



Commonwealth Environment Research Facilities

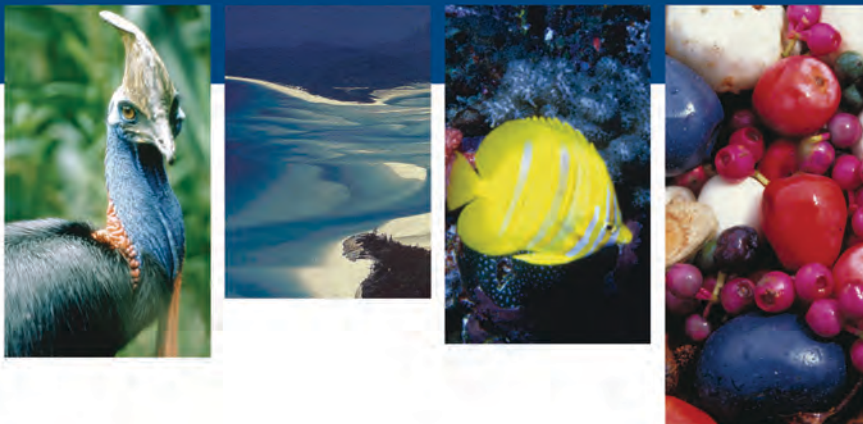
Marine and Tropical Sciences Research Facility



Tourist Exit Survey First Annual Report: January - December 2007

Annual and Quarterly Patterns of Reef and Rainforest
Tourism in North Queensland from Exit Surveys
Conducted at Cairns Domestic Airport

Karen McNamara and Bruce Prideaux



Australian Government
Department of the Environment,
Water, Heritage and the Arts

Tourist Exit Survey First Annual Report: January – December 2007

Annual and Quarterly Patterns of Reef and Rainforest Tourism in North Queensland from Exit Surveys Conducted at Cairns Domestic Airport

Karen McNamara and Bruce Prideaux
School of Business, James Cook University



Australian Government

**Department of the Environment,
Water, Heritage and the Arts**

Supported by the Australian Government's
Marine and Tropical Sciences Research Facility
Project 4.9.2 Sustainable nature based tourism: planning and management

© James Cook University

ISBN 9781921359163

This report should be cited as:

McNamara, K.. and Prideaux, B. (2008) *Tourist Exit Survey First Annual Report: January – December 2007. Annual and Quarterly Patterns of Reef and Rainforest Tourism in North Queensland from Exit Surveys Conducted at Cairns Domestic Airport*. Report to the Marine and Tropical Sciences Research Facility. Reef and Rainforest Research Centre Limited, Cairns (43pp).

Published by the Reef and Rainforest Research Centre on behalf of the Australian Government's Marine and Tropical Sciences Research Facility.

The Australian Government's Marine and Tropical Sciences Research Facility (MTRSF) supports world-class, public good research. The MTRSF is a major initiative of the Australian Government, designed to ensure that Australia's environmental challenges are addressed in an innovative, collaborative and sustainable way. The MTRSF investment is managed by the Department of the Environment, Water, Heritage and the Arts (DEWHA), and is supplemented by substantial cash and in-kind investments from research providers and interested third parties. The Reef and Rainforest Research Centre Limited (RRRC) is contracted by DEWHA to provide program management and communications services for the MTRSF.

This publication is copyright. The Copyright Act 1968 permits fair dealing for study, research, information or educational purposes subject to inclusion of a sufficient acknowledgement of the source.

The views and opinions expressed in this publication are those of the authors and do not necessarily reflect those of the Australian Government or the Minister for the Environment, Water, Heritage and the Arts.

While reasonable effort has been made to ensure that the contents of this publication are factually correct, the Commonwealth does not accept responsibility for the accuracy or completeness of the contents, and shall not be liable for any loss or damage that may be occasioned directly or indirectly through the use of, or reliance on, the contents of this publication.

This report is available for download from the Reef and Rainforest Research Centre Limited website:
http://www.rrrc.org.au/publications/research_reports.html



September 2008

Contents

| | |
|---|-----------|
| List of Figures | ii |
| List of Tables | ii |
| Acronyms Used in this Report..... | iii |
| Acknowledgements | iv |
| Introduction | 1 |
| Methodology | 2 |
| Limitations | 2 |
| Findings | 3 |
| 1. Surveyed visitors' socio-demographic characteristics | 3 |
| Gender and origin of surveyed visitors | 3 |
| Occupation | 4 |
| Age of surveyed visitors | 6 |
| 2. Surveyed visitors' travel behavior and motivations for travel | 7 |
| Travel party | 7 |
| First visit and length of stay | 9 |
| Accommodation..... | 10 |
| Transport..... | 12 |
| Previous holidays and alternative destinations | 13 |
| Motivations | 14 |
| Information sources | 17 |
| 3. Surveyed visitors' experiences in and satisfaction with Tropical North Queensland | 19 |
| Visits to rainforests of the Wet Tropics | 19 |
| Visits to the Great Barrier Reef | 22 |
| Rainforest activities | 25 |
| Budget of surveyed visitors and where they travelled during their trip | 27 |
| Overall satisfaction with visit to Tropical North Queensland | 32 |
| Publications List – Year One..... | 33 |
| Appendix A – Survey Instrument..... | 34 |

List of Figures

| | | |
|-------------------|--|----|
| Figure 1: | Origin of visitors surveyed | 3 |
| Figure 2: | Occupation of visitors surveyed..... | 4 |
| Figure 3: | Age of visitors surveyed | 6 |
| Figure 4: | Travel party of visitors surveyed..... | 7 |
| Figure 5: | Percentage of respondents on their first visit to TNQ..... | 9 |
| Figure 6: | Chosen accommodation type of visitors surveyed | 10 |
| Figure 7: | Surveyed visitors' chosen mode of transport..... | 12 |
| Figure 8: | Surveyed visitors' motivations for visiting TNQ | 14 |
| Figure 9: | Information sources used by surveyed visitors..... | 17 |
| Figure 10: | Rainforest locations visited by surveyed tourists..... | 19 |
| Figure 11: | Visitors' reasons for not visiting the rainforests of North Queensland | 21 |
| Figure 12: | Departure locations for the Great Barrier Reef as used by surveyed visitors.... | 22 |
| Figure 13: | Visitors' reasons for not visiting the Great Barrier Reef..... | 23 |
| Figure 14: | Visitors' level of interest in rainforest activities | 25 |
| Figure 15: | Locations travelled through or to during visitors' trips to North Queensland | 28 |
| Figure 16: | Overall surveyed visitors' satisfaction with their trip to TNQ..... | 32 |

List of Tables

| | | |
|------------------|---|----|
| Table 1: | Comparison of surveyed domestic and international visitors' occupations | 4 |
| Table 2: | Comparison of age groups of surveyed domestic and international visitors | 6 |
| Table 3: | Comparison of chosen travel parties of surveyed domestic and international visitors | 8 |
| Table 4: | Comparison of accommodation types chosen by surveyed domestic and international visitors..... | 10 |
| Table 5: | Comparison of surveyed domestic and international respondents' chosen modes of transport..... | 12 |
| Table 6: | Most popular and recent holiday destinations for surveyed visitors | 13 |
| Table 7: | Alternative destinations considered by surveyed visitors | 13 |
| Table 8: | Comparison of surveyed domestic and international visitors' motivations for visiting TNQ | 15 |
| Table 9: | The rank for each motivation of the overall sample, domestic and international visitors..... | 16 |
| Table 10: | Comparison of surveyed domestic and international visitors' information sources | 14 |
| Table 11: | Comparison of rainforest locations visited by surveyed domestic and international visitors..... | 20 |
| Table 12: | Comparison of departure locations for the Great Barrier Reef as used by surveyed domestic and international visitors..... | 23 |
| Table 13: | Comparison of surveyed domestic and international visitors' interests in rainforest activities..... | 25 |
| Table 14: | Overall trip budget for surveyed visitors according to origin and occupation | 27 |

| | | |
|------------------|--|----|
| Table 15: | Comparison of visitors' chosen locations to travel through or to in North Queensland, and gender | 28 |
| Table 16: | Comparison of locations travelled through or to by surveyed domestic and international visitors..... | 29 |
| Table 17: | Comparison of locations travelled through or to by visitors, and their occupation | 29 |
| Table 18: | Comparison of locations travelled through or to by visitors, and their age | 30 |

Acronyms Used in this Report

MTSRFMarine and Tropical Sciences Research Facility

TNQ.....Tropical North Queensland

Acknowledgements

A number of individuals and organisations assisted in the development of this research project, providing their time to review the project and the approach taken, for which we are grateful:

- Wet Tropics Management Authority – in particular, Max Chappell and Campbell Clarke;
- Tropical Tourism North Queensland – in particular, Rob Giason, Melinda Connelly and Annie Riddett; and
- The Alliance for Sustainable Tourism.

A special mention to the Cairns Domestic Airport – without their support and partnership, it would not have been possible for us to collect on-site tourist exit surveys. We are very grateful to the airport staff, particularly Alicia Prince, for their on-going cooperation and collaboration.

Lastly, to the many research assistants who have injected a large amount of time and energy into this project – Iris Kaeslin Grogg, Jonathan Sibtain, Lisa King, Lynn (Dan) Dai and Vanessa Eden – many thanks for all your hard work. And thank you to former project manager Dr Fay Falco-Mammone, who administered the day-to-day running of this project throughout most of 2007.

Introduction

This Annual Report is a culmination of research conducted in 2007 through tourist exit surveys at Cairns Domestic Airport. This research was funded through the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF). The exit surveys help in exploring both reef and rainforest tourism in North Queensland. As such, this research has the potential to add another dimension and context to the following MTRSF Projects:

- Project 4.9.2 *Sustainable nature based tourism: planning and management*; and
- Project 4.8.6 *Analysis of recreational and tourism use and impact on the Great Barrier Reef for managing sustainable tourism*.

The aim of the survey was to develop a comprehensive data set, on a monthly basis, that would allow the research team to investigate a range of issues including tourists' demographic profiles, motivations, activities, segmentation and seasonality on an annual basis. The data contained in this report will provide a baseline against which future trends can be measured. To date, data has been released on a quarterly basis. This will continue into the future. Importantly future barometers and annual reports will track changes in a number of reporting categories providing readers with up-to-date analyses of trends that are occurring in arrival patterns, motivations and experiences.

The Cairns Domestic Airport was selected as the survey site because it is the major exit point from the region.

Throughout this Annual Report, data is provided for each quarter as well as on an annual basis. The quarters of data collection were as follows: January-March; April-June; July-September and; October-December. A total of 1,451 surveys were completed by tourists at the Cairns Domestic Airport during this period.

The results in the Annual Report are broadly grouped into the following three thematic areas:

- Socio-demographic characteristics of surveyed visitors;
- Surveyed visitors' travel behaviour throughout the region and motivations for travel; and
- The experiences, satisfaction and recommendations of surveyed visitors.

The individual quarterly data that has already been released can be accessed at the MTRSF website¹. Given that fieldwork for this project began in November 2006, the first four quarterly barometers have been as follows: November to January (Q1); February to April (Q2); May to July (Q3); and August to October (Q4). For 2008 onwards, the quarters will be shifted so that they align with the calendar year, and as such this Annual Report for 2007 will analyse data from January to December.

¹ http://www.rrrc.org.au/publications/tourism_barometers.html

Methodology

The primary method used for this research was self-completed surveys issued and collected at the Cairns Domestic Airport. This site was selected because it provided a convenient place to collect exit surveys in a period where most persons approached had time to fill in the form. Surveys were distributed twice each month by trained research assistants. During each survey period, visitors were approached and asked if they were residents of North Queensland or visitors to the region. After identifying their place of residence, only visitors to the region were asked if they wished to participate in the survey. Many of the respondents reported that they found the experience of completing the survey useful, allowing them to reflect on their experiences and contribute their opinions to the research and broader project.

The survey instrument was developed through a rigorous consultative phase and was piloted before the commencement of the annual monitoring program. During the consultation phase, meetings were held with the Wet Tropics Management Authority, Tourism Tropical North Queensland, the University of Queensland, and the Alliance for Sustainable Tourism. This ensured that the questions and issues covered in the survey were relevant, useful and timely for stakeholders including government, industry and academia. From these meetings and on-site piloting at Cairns Domestic Airport, specific content was determined, including: socio-demographics; motivational questions; travel patterns; and a rapid response section to emerging issues and topics of interest to stakeholders. The survey, as described above, also has the capability of collecting data for other projects funded by the MTSRF.

To randomise results, the survey days were varied between weekdays and weekends. No other methods of randomisation were used. This method ensured that a wide cross section of visitors was surveyed. Improvements however for 2008 will include having the survey translated into both Mandarin and Japanese to service both these large and booming visitor markets throughout the region.

The survey instrument is attached in Appendix A. The results from the surveys were scanned, manually entered and coded into SPSS (*Statistical Package for the Social Sciences*, version 14.0). As a token of appreciation, respondents were given a complementary postcard to thank them for completing the survey.

Limitations

The collection method adopted has several limitations. Firstly, only visitors exiting the region from the airport were surveyed. As a consequence visitors departing by car, bus or train were not surveyed. Other data sets indicate that the overall numbers using modes other than air are quite small and as a consequence the inability to survey these visitors is not seen as a major limitation. For example, based on the results of the National Visitors survey, year ending September 2007, forty-seven percent of visitors used air transport, forty-eight percent used private or company vehicle, with five percent making up other categories.

A second limitation is that visitors who are not proficient in English were not surveyed. The concern here is that Japanese and Chinese visitors who constitute a significant market for the region are not represented in this report. This will be rectified in 2008 with surveys being conducted in Japanese and Chinese.

Because of these limitations, some care will be required when generalising the results.

Findings

This section presents the overall annual and quarterly findings of reef and rainforest tourism in North Queensland, based on exit surveys undertaken at Cairns Domestic Airport.

1. Surveyed visitors' socio-demographic characteristics

Gender and origin of surveyed visitors

On a gender basis, 57.1% of completed surveys were collected from female visitors, compared to 42.9% from male visitors. This rate remained largely consistent throughout the year, with only a slight drop in females completing the survey in Quarter 1 (January to March, 55.7%) and a slight rise in Quarter 4 (October to December, 58.4%).

On an annual basis, 40.2% of respondents were domestic visitors while 59.8% of respondents were international visitors. This rate varied throughout the year. The percentage of domestic tourists completing the surveys dropped in Quarters 1 (January to March, 35.7%) and 4 (October to December, 32.5%), and increased substantially during Quarters 2 (April to June, 42.8%) and 3 (July to September, 47.3%). The survey therefore follows the trend of the 'high season' in North Queensland, particularly for domestic tourists, as being the period April through to September.

Figure 1 shows the origins of visitors for the 2007 data collection. After domestic visitors, the second largest group of respondents was from the United Kingdom and Ireland, followed by North America.

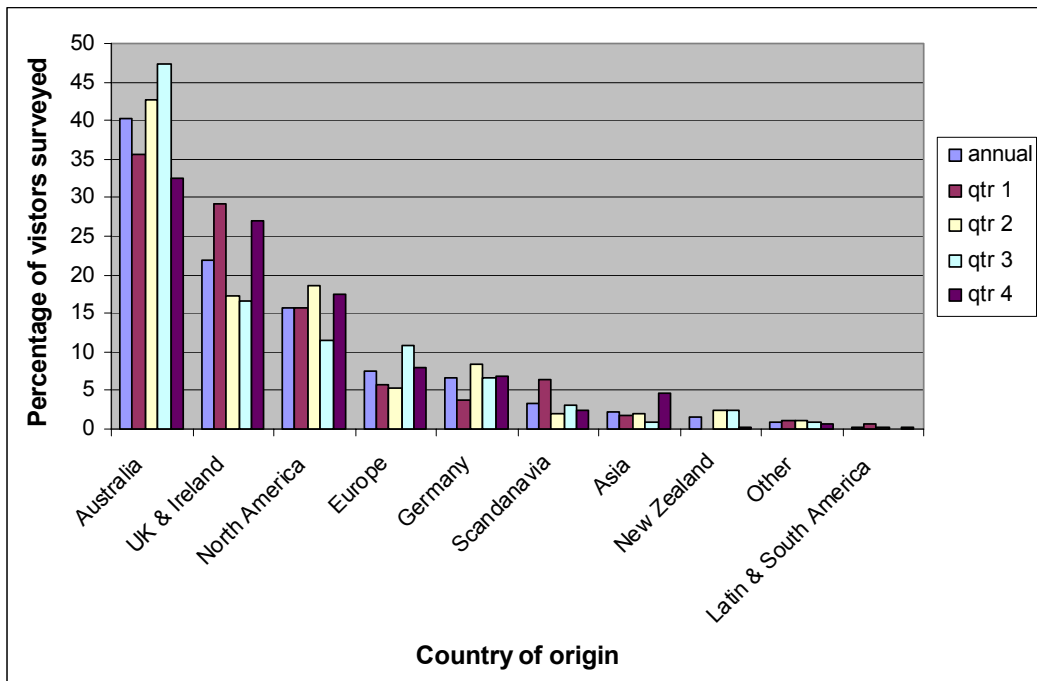


Figure 1: Origin of visitors surveyed (as percentages of annual and quarterly samples).

Occupation

By occupation, the largest group of respondents was professionals (22.0%), followed by retirees / semi-retirees (18.6%) and students (16.5%). There were a number of seasonal variations in the quarterly results. While there was an increase in the percentage of professionals surveyed in Quarter 4 (October to December, 25.8%), the percentage of retirees rose during Quarters 1 (January to March, 21.4%) and 2 (April to June, 21.8%) for students.

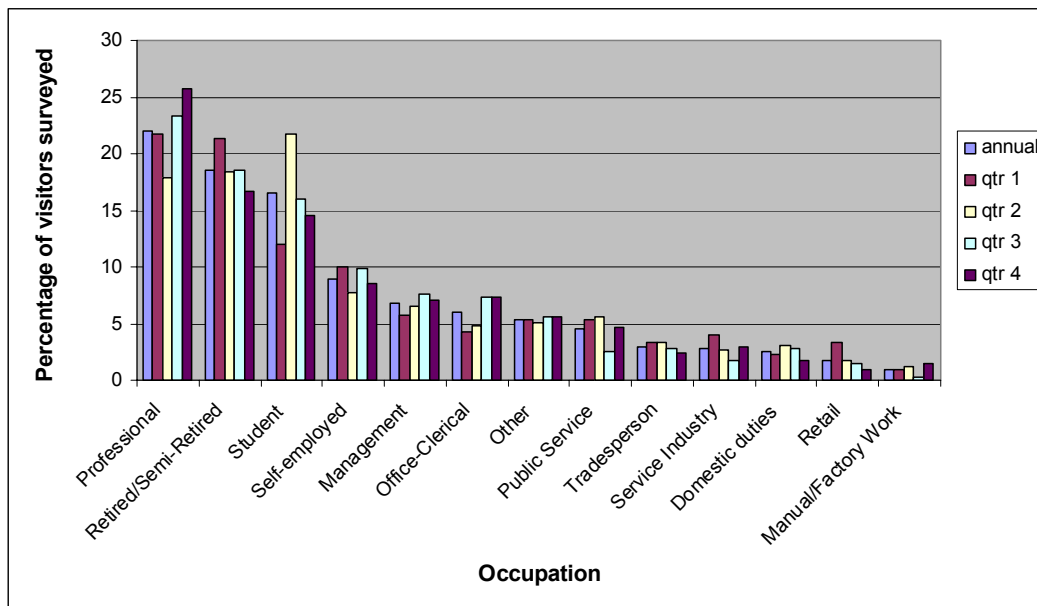


Figure 2: Occupation of visitors surveyed (as percentages of annual and quarterly samples).

Table 1: Comparison of surveyed domestic and international visitors' occupations.

| Occupation | Domestic visitors (%) | International visitors (%) |
|----------------------|-----------------------|----------------------------|
| Professional | 20.8 | 22.9 |
| Retired/Semi-Retired | 17.3 | 19.6 |
| Student | 11.6 | 19.8 |
| Self-employed | 13.7 | 5.8 |
| Management | 6.2 | 7.2 |
| Office-Clerical | 5.5 | 6.4 |
| Other | 5.9 | 5.1 |
| Public Service | 4.7 | 4.3 |
| Tradesperson | 4.3 | 2.0 |
| Service Industry | 2.2 | 3.0 |
| Domestic Duties | 4.2 | 1.5 |
| Retail | 2.6 | 1.3 |
| Manual/Factory Work | 1.0 | 0.9 |

**Box 1: Socio-demographics similarities
between professionals and retirees / semi-retirees**

A profile based on socio-demographics indicates that visitors who selected 'professionals' as their occupation (22.0% of sample) comprised an almost equal make up of females (21.5%) and males (22.7%), and were:

- Slightly more likely to be international visitors (22.9%);
- Aged between 30-39 years (32.6%);
- Travelling alone (26.1%);
- Staying in a caravan park/cabin (32.5%); and
- Travelling by cruise boat (40.0%).

These demographics were very similar to those visitors who indicated that they were 'semi-retired/retired' (18.6% of sample). This group comprised an almost equal make up of females (17.6%) and males (20.1%), and were:

- Slightly more likely to be international visitors (19.6%);
- Aged over 65 years (56.1%);
- Travelling as part of a tour group (43.3%);
- Staying in a hotel or motel (25.5%); and
- Travelling by rail (46.7%).

Age of surveyed visitors

Figure 3 below presents the overall annual age of respondents as well as data for each quarter. The combined bracket of 20-39 years makes up over 42% of the sample. This combined bracket fluctuates during the seasons. In Quarters 1 (January to March) and 2 (April to June), there was a strong increase in visitors surveyed aged 20-29 years (29.4% and 32.0% respectively). Towards the later part of the year, the 20-29 years age group declined in numbers, and the 30-39 years age group increased. For example, in Quarter 4 (October to December), only 10.1% of visitors surveyed were aged 20-29 years, whereas 31.7% of visitors surveyed were aged 30-39 years.

Table 2 illustrates the main difference between domestic and international visitors. Compared to domestic visitors, there were more international respondents in the 20-29 years age group and the over 65 years age group.

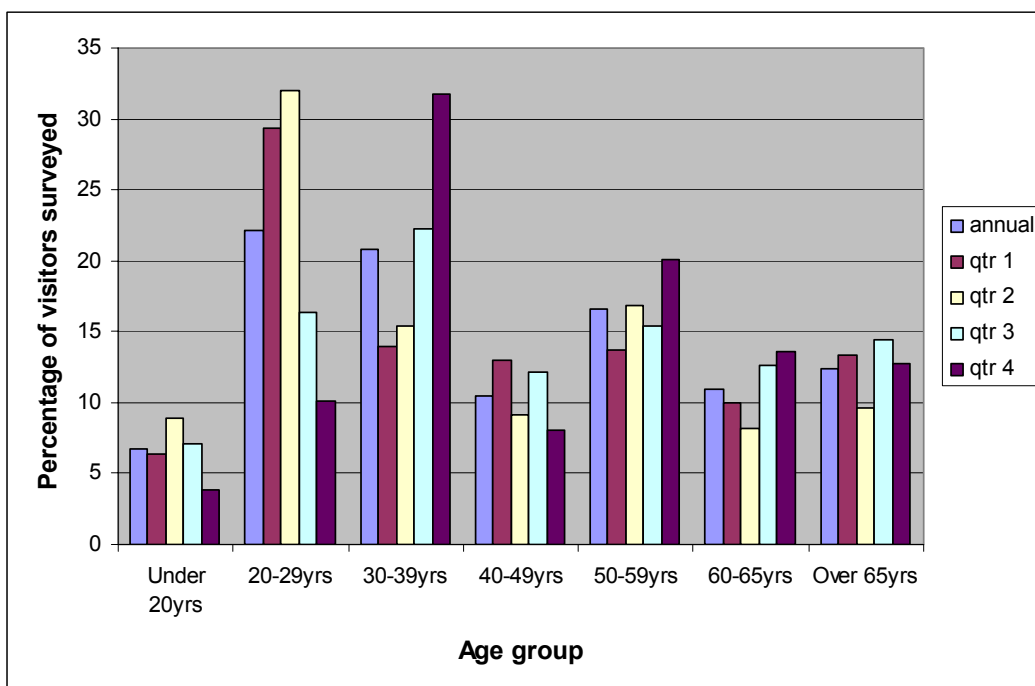


Figure 3: Age of visitors surveyed (as percentages of annual and quarterly samples).

Table 2: Comparison of age groups of surveyed domestic and international visitors.

| Age group | Domestic visitors (%) | International visitors (%) |
|--------------|-----------------------|----------------------------|
| Under 20 yrs | 8.4 | 5.5 |
| 20-29 yrs | 16.0 | 26.1 |
| 30-39 yrs | 21.4 | 20.4 |
| 40-49 yrs | 14.1 | 8.0 |
| 50-59 yrs | 17.6 | 15.8 |
| 60-65 yrs | 11.4 | 10.9 |
| Over 65 yrs | 11.0 | 13.3 |

2. Surveyed visitors' travel behaviour and motivations for travel

Travel party

The largest travel party sector were couples (42.1 %); a figure which remained consistent throughout the year (see Figure 4). Following couples, the most significant travel parties were visitors travelling alone (18.6%), which peaked in Quarter 1 (January to March, 23.4%), and those traveling with friends (12.8%), which also peaked in Quarter 1 (16.4%). Results indicated that travel parties comprising a family with children (overall 11.4%) exhibited a strong seasonal trend – with sharp declines in Quarter 1 (January to March, 4.3%) and higher rates through Quarters 2 (April to June, 12.8%), 3 (July to September, 13.6%) and 4 (October to December, 13.6%).

Based on travel party, more domestic visitors traveled as a couple than internationals. A similar pattern was identified with respondents travelling alone and travel parties consisting of a family with children (see Table 3). International travelers were more likely to travel as friends compared to domestic visitors.

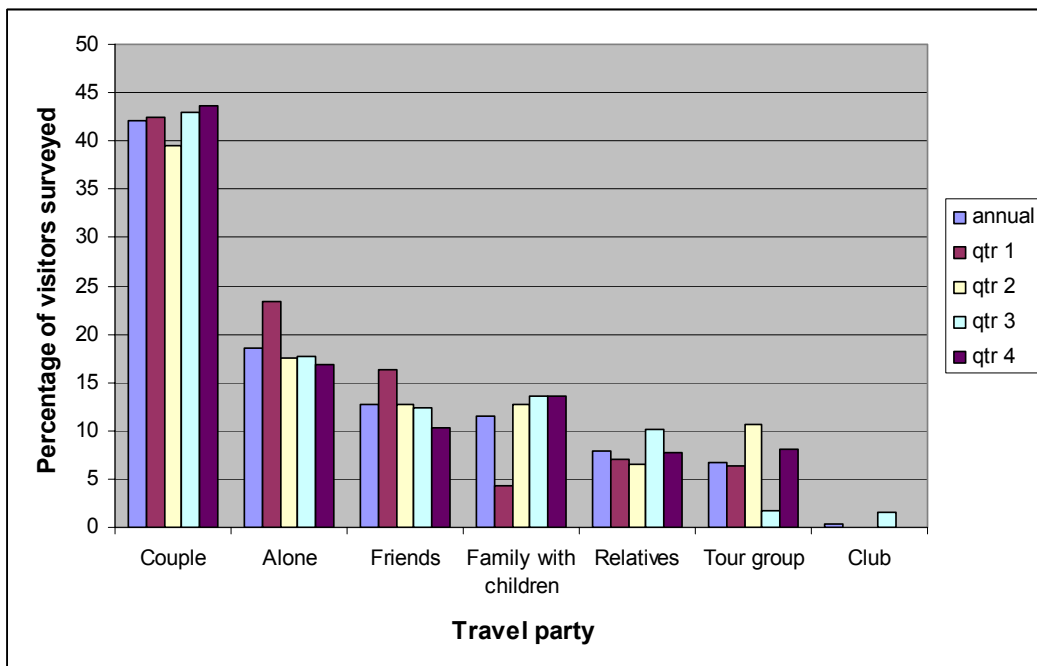


Figure 4: Travel party of visitors surveyed (as percentages of annual and quarterly samples).

Table 3: Comparison of chosen travel parties of surveyed domestic and international visitors.

| Travel Party | Domestic visitors (%) | International visitors (%) |
|----------------------|------------------------------|-----------------------------------|
| Couple | 44.5 | 40.5 |
| Alone | 23.7 | 15.3 |
| With friends | 7.4 | 16.5 |
| Family with children | 13.8 | 10.0 |
| With relatives | 8.1 | 7.8 |
| Tour group | 1.6 | 9.9 |
| Club | 0.9 | 0.1 |

First visit and length of stay

Figure 5 illustrates that overall, 67.3% of respondents were first time visitors to North Queensland. This figure fluctuated throughout the year, with drops in Quarters 2 (April to June, 67.2%) and 3 (July to September 61.5%).

For the remaining 32.7% of respondents who had visited North Queensland previously, 52.8% had visited the region up to three times previously.

Over the survey period the average length of stay was 8.1 nights. In Quarter 1 (January to March) this increased just slightly to 8.4 nights, and increased further in Quarter 2 (April to June) to 9.3 nights. In Quarter 3 (July to September) the average number of nights spent in North Queensland dropped to 7.9 nights, and again in Quarter 4 (October to December) to 6.5 nights.

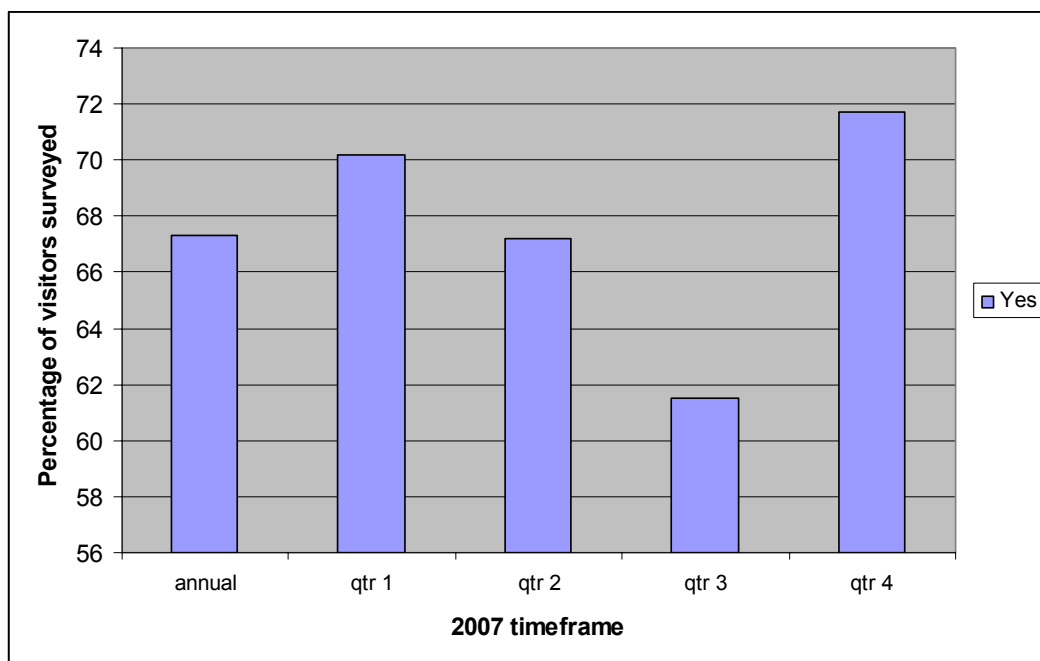


Figure 5: Percentage of respondents on their first visit to TNQ (as percentages of annual and quarterly samples, and rainforest location).

Accommodation

Patterns of accommodation also varied between domestic and international visitors although the overall pattern remained relatively constant across the quarters. As Figure 6 illustrates, hotels/motels were the most popular form of accommodation (36.7%), peaking in Quarter 4 (October to December, 40.3%), during the Christmas and school holidays period.

As with the other travel behaviour variables, the domestic and international visitor markets are compared in Table 4 in relation to accommodation preferences. Of note is the much larger preference of international visitors for hotels/motels and backpackers' hostels; whereas domestic visitors preferred holiday apartments/units, resorts or staying with friends or relatives.

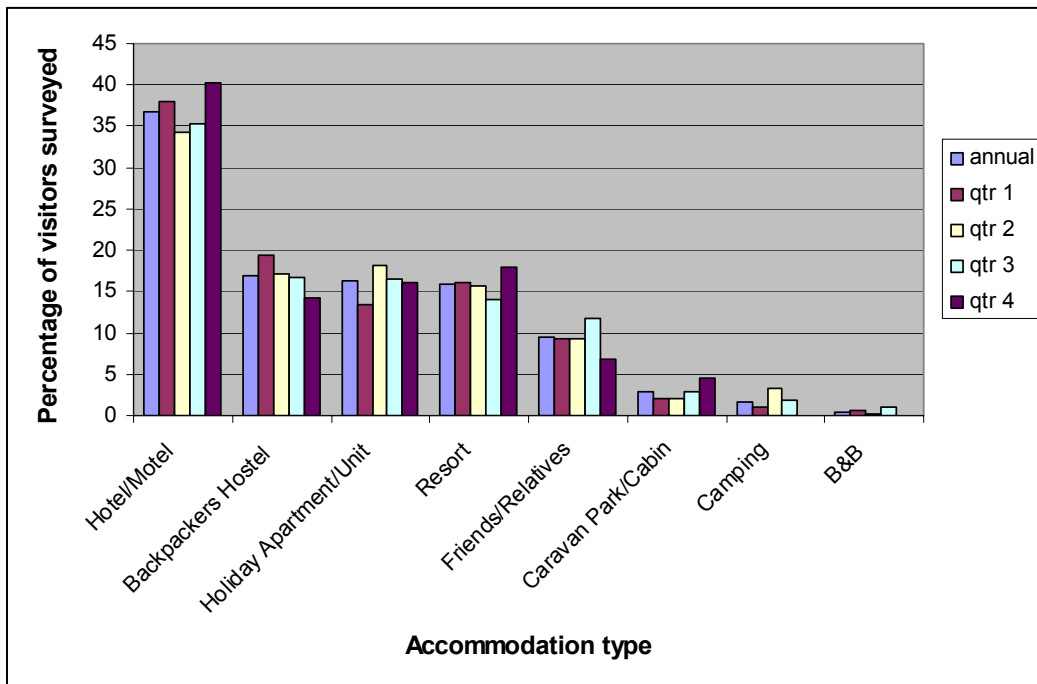


Figure 6: Chosen accommodation type of visitors surveyed (as percentages of annual and quarterly samples).

Table 4: Comparison of accommodation types chosen by surveyed domestic and international visitors.

| Accommodation type | Domestic visitors (%) | International visitors (%) |
|------------------------|-----------------------|----------------------------|
| Hotel/Motel | 24.3 | 44.9 |
| Backpackers' Hostel | 4.3 | 25.1 |
| Holiday Apartment/Unit | 23.3 | 11.6 |
| Resort | 25.2 | 9.7 |
| Friends/Relatives | 18.4 | 3.5 |
| Caravan Park/Cabin | 3.0 | 2.7 |
| Camping | 1.1 | 2.0 |
| Bed 'n' Breakfast | 0.4 | 0.6 |

Box 2: Who stayed where? The socio-demographics of domestic and international visitors who stayed in apartments and with friends

A profile based on socio-demographics indicates that domestic visitors who stayed in holiday apartments were largely: female (65.4%); travelling as a couple (52.7%) and by air (58.1%); aged between 20-29 or 50-59 years (both 16.2%); not on their first visit to the region (53.1%); and retired/semi-retired (23.8%). Whereas, domestic visitors who stayed with friends were more likely to be: female (60.2%); aged 30-39 years (19.4%); travelling alone (48.5%) and by air (51%); not on their first visit to the region (85.4%); and retired/semi-retired (22.3%).

A profile based on socio-demographics indicates that international visitors who stayed in holiday apartments tended to be: female (57%); from the United Kingdom and Ireland (57%); aged 30-39 years (18%); travelling as a couple (42%) and by air (62.6%); on their first visit to the region (84%); and retired/semi-retired (24%). Whereas, international visitors who stayed with friends were more likely to be: female (56.7%); from the United Kingdom and Ireland (30%); aged between 20-29 or 30-39 years, and over 65 years (all 23.3%); travelling alone (43.3%) and by air (51%); on their first visit to the region (53.3%); and students (26.7%).

Transport

It is clear from Figure 7 that the dominant mode of transport for surveyed visitors was air transport (53.3%), but given that surveys were conducted at the Cairns Domestic Airport this was not surprising. Other modes of transport used by visitors while touring the region included buses/coaches (17.2%) and rental cars (17.0%).

In comparing international and domestic respondents, Table 5 reveals that rental cars and private vehicles were the preferred option for domestic visitors. For international visitors, buses/coaches were the preferred mode of travelling in and around the region.

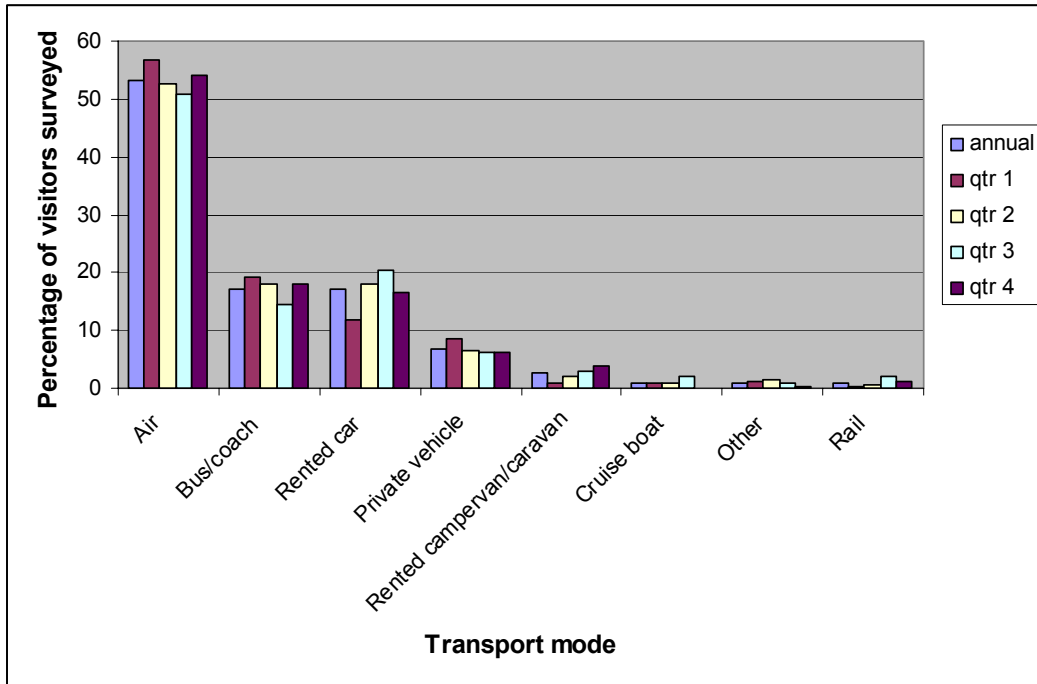


Figure 7: Surveyed visitors’ chosen mode of transport (as percentages of annual and quarterly samples).

Table 5: Comparison of surveyed domestic and international respondents’ chosen modes of transport.

| Mode of transport | Domestic visitors (%) | International visitors (%) |
|--------------------------|-----------------------|----------------------------|
| Air | 52.4 | 53.8 |
| Bus/Coach | 6.9 | 24.2 |
| Rented car | 23.8 | 12.4 |
| Private vehicle | 12.5 | 2.9 |
| Rented campervan/caravan | 0.7 | 3.8 |
| Cruise boat | 1.0 | 1.0 |
| Other | 1.2 | 0.9 |
| Rail | 1.4 | 0.8 |

Previous holidays and alternative destinations

Table 6 lists the locations of the most popular holidays taken by those respondents surveyed on their last holiday prior to visiting North Queensland. Comparisons are then made between these most popular destinations for domestic and international respondents.

The exit survey also posed a question to visitors on the alternative destinations they considered when planning their current trip (to North Queensland). The most popular of these destinations are shown in Table 7 which indicates a strong focus on Australian capital cities, and the Asia-Pacific region.

Table 6: Most popular and recent holiday destinations for surveyed visitors (as percentages of annual and, domestic and international visitors).

| Destinations | Overall visitors (%) | Domestic visitors (%) | International visitors (%) |
|--------------------------|-----------------------------|------------------------------|-----------------------------------|
| United States of America | 5.1 | 0.5 | 7.3 |
| New Zealand | 4.1 | 4.0 | 4.2 |
| Spain | 3.6 | 0.2 | 5.9 |
| Cairns | 3.0 | 4.8 | 1.7 |
| France | 2.7 | 0.7 | 4.1 |
| Gold Coast | 2.6 | 5.5 | 0.8 |
| United Kingdom | 2.6 | 1.8 | 3.1 |
| Thailand | 2.3 | 2.1 | 2.4 |
| Italy | 2.2 | 0.7 | 3.0 |
| Europe | 2.1 | 3.0 | 1.4 |
| Sydney | 2.0 | 2.9 | 1.4 |

Table 7: Alternative destinations considered by surveyed visitors (as percentages of annual).

| Destinations | Overall visitors (%) |
|--------------------------|-----------------------------|
| New Zealand | 4.9 |
| Sydney | 4.0 |
| Melbourne | 2.6 |
| Thailand | 2.2 |
| Fiji | 2.1 |
| Brisbane | 2.0 |
| Perth | 2.0 |
| Darwin | 1.6 |
| United States of America | 1.6 |
| Gold Coast | 1.5 |
| Tasmania | 1.5 |
| Uluru | 1.5 |
| Uluru | 4.9 |

Motivations

The exit survey contained a question that listed a number of motivations for visiting North Queensland. Respondents were asked to rate the importance of each motivation on a scale from 1 (not at all important) to 5 (very important). Some of these motivations included rest and relaxation, tasting tropical fruits, and climate. From Figure 8, it is clear that visiting the Great Barrier Reef (mean = 4.26) and the rainforest (mean = 4.0) were among the most important motivations for visiting North Queensland. Interestingly, these figures increased during the wet season (Quarters 1, January to March; and 4, October to December), which coincides with the region’s *low* tourist season. During this period, bad weather had the potential to reduce the number of favourable days for visiting these areas. Other motivations listed with a high importance by respondents revolved around seeing the natural environment (mean = 3.90) or wildlife (mean = 3.89), and relaxation (mean = 3.89).

A comparison of motivations between international and domestic visitors is presented in Table 8. Results indicate that natural features and surrounds were the primary drivers for visiting North Queensland.

Table 9 illustrates the total rank for each motivation, followed by the overall rank by domestic and international visitors.

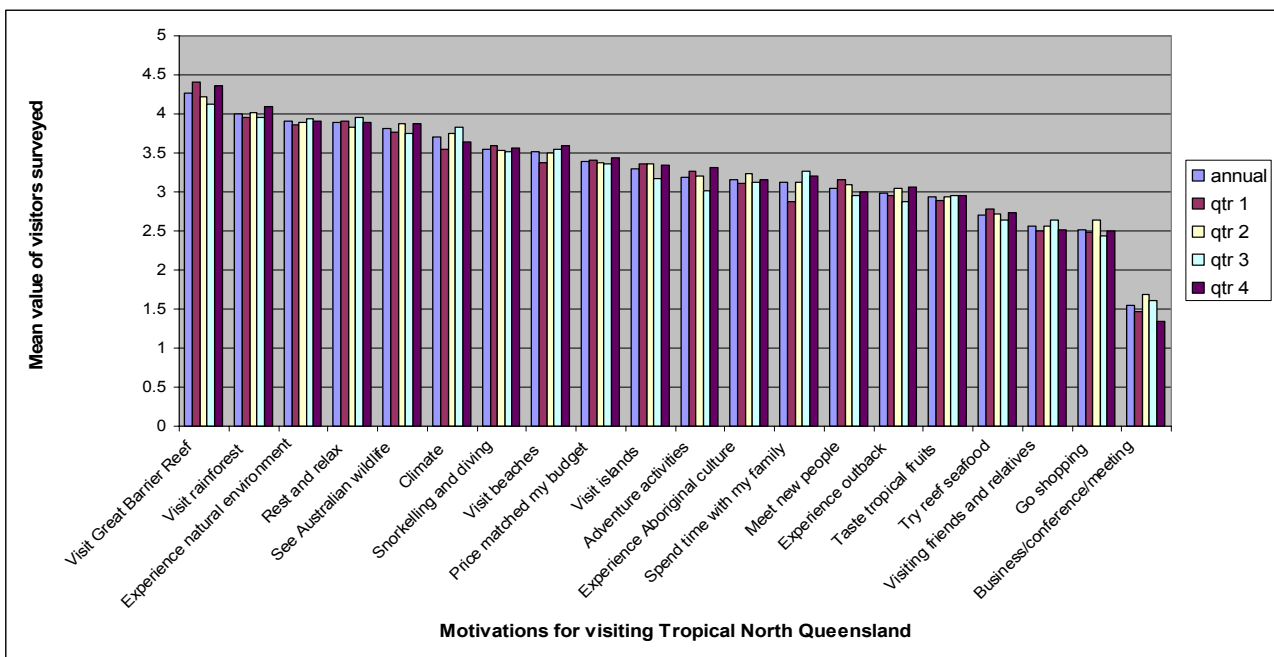


Figure 8: Surveyed visitors’ motivations for visiting TNQ (as percentages of annual and quarterly samples).

Table 8: Comparison of surveyed domestic and international visitors' motivations for visiting TNQ.

| Motivations | Domestic visitors (mean) | International visitors (mean) |
|--------------------------------|--------------------------|-------------------------------|
| Visit Great Barrier Reef | 3.70 | 4.62 |
| Visit rainforest | 3.76 | 4.16 |
| Experience natural environment | 3.75 | 4.00 |
| Rest and relax | 4.17 | 3.17 |
| See Australian wildlife | 3.27 | 4.17 |
| Climate | 3.76 | 3.66 |
| Snorkelling and diving | 3.15 | 3.81 |
| Visit beaches | 3.47 | 3.53 |
| Price matched my budget | 3.46 | 3.34 |
| Visit Islands | 3.21 | 3.36 |
| Adventure activities | 2.95 | 3.34 |
| Experience Aboriginal culture | 2.74 | 3.43 |
| Spend time with my family | 3.57 | 2.86 |
| Meet new people | 2.84 | 3.18 |
| Experience outback | 2.58 | 3.24 |
| Taste tropical fruits | 3.04 | 2.87 |
| Try reef seafood | 2.91 | 2.58 |
| Visiting friends and relatives | 2.84 | 2.38 |
| Go shopping | 2.57 | 2.48 |
| Business/conference/meeting | 1.79 | 1.37 |

Box 3: Experiencing Aboriginal culture as a motivator for visiting North Queensland

A profile based on socio-demographics and travel behaviour indicates that experiencing Aboriginal culture was highest amongst surveyed visitors who were:

- From Germany (mean=3.56), and the UK and Ireland (mean=3.5);
- Over 65 years (mean=3.39), and in the age group 60-65 years (mean=3.23);
- Employed as a manual/factory worker (mean=3.5), and retired/semi-retired (mean=3.43);
- Travelling as part of a tour group (mean=3.87);
- On their first visit to Tropical North Queensland (mean=3.31);
- Staying in a hotel or motel during their visit (mean=3.34) and;
- Travelling by bus or coach (mean=3.42).

Table 9: The rank for each motivation of the overall sample, domestic and international visitors.

| Rank | Overall sample | Domestic visitors surveyed | International visitors surveyed |
|------|--------------------------------|--------------------------------|---------------------------------|
| 1 | Visit Great Barrier Reef | Rest and relax | Visit Great Barrier Reef |
| 2 | Visit rainforest | Climate | See Australian wildlife |
| 3 | Experience natural environment | Visit rainforest | Visit rainforest |
| 4 | Rest and relax | Experience natural environment | Experience natural environment |
| 5 | See Australian wildlife | Visit Great Barrier Reef | Snorkelling and diving |
| 6 | Climate | Spend time with family | Climate |
| 7 | Snorkelling and diving | Visit beaches | Visit beaches |
| 8 | Visit beaches | Price matched my budget | Experience Aboriginal culture |
| 9 | Price matched my budget | See Australian wildlife | Visit islands |
| 10 | Visit Islands | Visit islands | Adventure activities |
| 11 | Adventure activities | Snorkelling and diving | Price matched my budget |
| 12 | Experience Aboriginal culture | Taste tropical fruits | Experience outback |
| 13 | Spend time with my family | Adventure activities | Meet new people |
| 14 | Meet new people | Try reef seafood | Rest and relax |
| 15 | Experience outback | Meet new people | Taste tropical fruits |
| 16 | Taste tropical fruits | Visiting friends and relatives | Spend time with family |
| 17 | Try reef seafood | Experience Aboriginal culture | Try reef seafood |
| 18 | Visiting friends and relatives | Experience outback | Go shopping |
| 19 | Go shopping | Go shopping | Visiting friends and relatives |
| 20 | Business/conference/meeting | Business/conference/meeting | Business/conference/meeting |

Box 4: Who does price motivate to this region?

Based on socio-demographic characteristics and travel behaviour, those most motivated by price for a visit to the region were:

- Female (mean=3.48);
- From Asia (mean=3.76);
- Over 65 years (mean=3.57);
- Employed doing domestic duties (mean=4.03);
- Travelling with friends (mean=3.53);
- On their first visit to North Queensland (mean=3.42);
- Staying in a Bed 'n' Breakfast (mean=3.57); and
- Travelling by rail (mean=3.73).

Information sources

Tourists' most popular source of information on North Queensland was friends and relatives (42.7%). Figure 9 illustrates that friends and relatives maintained relatively consistent as an information source across the four quarters. This differed from *other information sources*, in terms of popularity – guidebook, internet, travel agent and “have been before” – which all exhibited seasonal peaks and drops.

Table 10 highlights some notable differences in the information sources used by domestic and international visitors. For example, domestic visitors relied more on previous visits to the region for information, as well as ads in print, and on TV or radio.

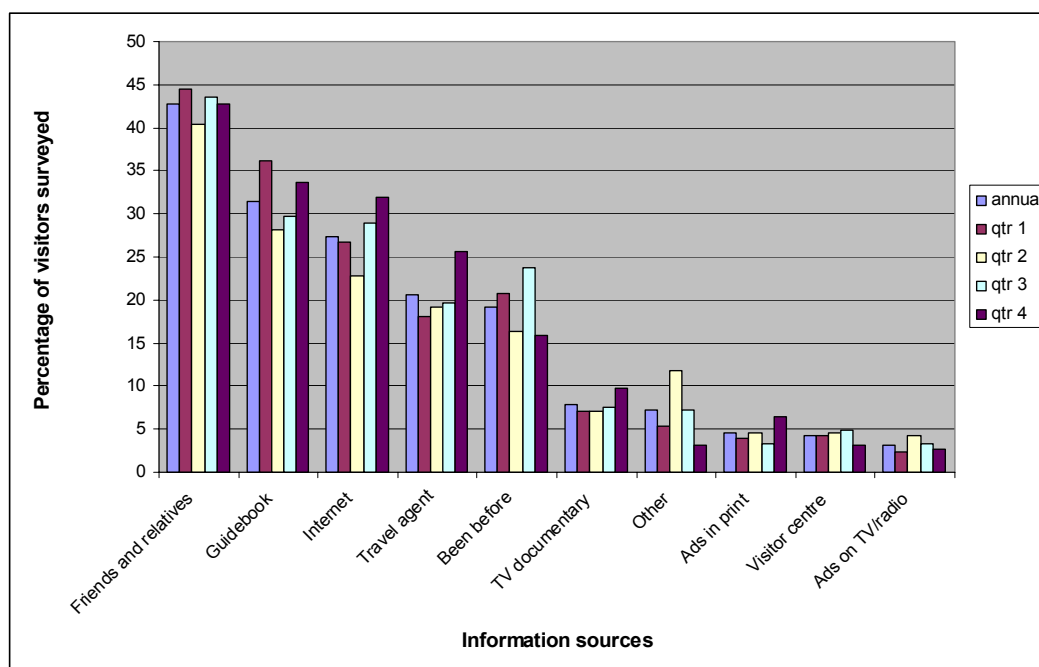


Figure 9: Information sources used by surveyed visitors (as percentages of annual and quarterly samples).

Box 5: So who uses the Guidebook?

Interestingly, the guidebook was used by a number of visitors surveyed as an information source to assist in their travels in North Queensland (31.5%).

So, who are the visitors who use guidebooks?

- Equally male or female (32.2% and 31.0% respectively);
- Scandinavians (66%) and Germans (65.3%);
- Those aged 20-29 yrs (40.6%);
- Those employed in office/clerical work (41.4%);
- Visitors travelling with friends (42.5%);
- Visitors on their first visit to North Queensland (40.6%);
- Visitors who are camping (65.2%) and staying at a backpackers' hostel (55.6%); and
- Visitors renting a campervan or caravan (78.4%).

Table 10: Comparison of surveyed domestic and international visitors' information sources.

| Information sources | Domestic visitors (%) | International visitors (%) |
|----------------------------|------------------------------|-----------------------------------|
| Friends and relatives | 40.7 | 43.9 |
| Guidebook | 12.8 | 44.3 |
| Internet | 22.2 | 31.2 |
| Travel agent | 10.3 | 27.3 |
| Been before | 36.2 | 7.8 |
| TV documentary | 6.6 | 8.7 |
| Other | 9.5 | 5.8 |
| Ads in print | 6.6 | 3.2 |
| Visitor centre | 2.9 | 5.2 |
| Ads on television/radio | 5.0 | 2.1 |

3. Surveyed visitors' experiences in and satisfaction with Tropical North Queensland

Visits to rainforests of the Wet Tropics

Overall, 77.6% of respondents reported visiting the Wet Tropics World Heritage rainforests as part of their trip to the region. This figure remained largely consistent throughout the year with only a minor peak in Quarter 4 (October to December, 80.2%). As Figure 10 shows, the key hotspots for experiencing the rainforest included Kuranda (53.0%), Daintree (37.3%) and Mossman Gorge (32.5%). There was little variation in visitation rates across the seasons at the visited rainforest locations.

Table 11 provides a comparison between domestic and international visitors of rainforest visitation patterns. International visitors were more likely overall to visit the Wet Tropics rainforests in Kuranda, Cape Tribulation, the Mission Beach area, and Paluma, while domestic visitors were more likely to visit the Daintree, Mossman Gorge, Atherton Tablelands, and Innisfail region.

According to Figure 11, for the remaining 22.4% of respondents, the key reason for not visiting the Wet Tropics rainforests was *not enough time* (15.4% of total visitors), followed by *other* (6.6%). Within *other*, surveyed visitors noted that they had been before (1.7%), or were on a business trip (0.5%) or family visit (0.6%).

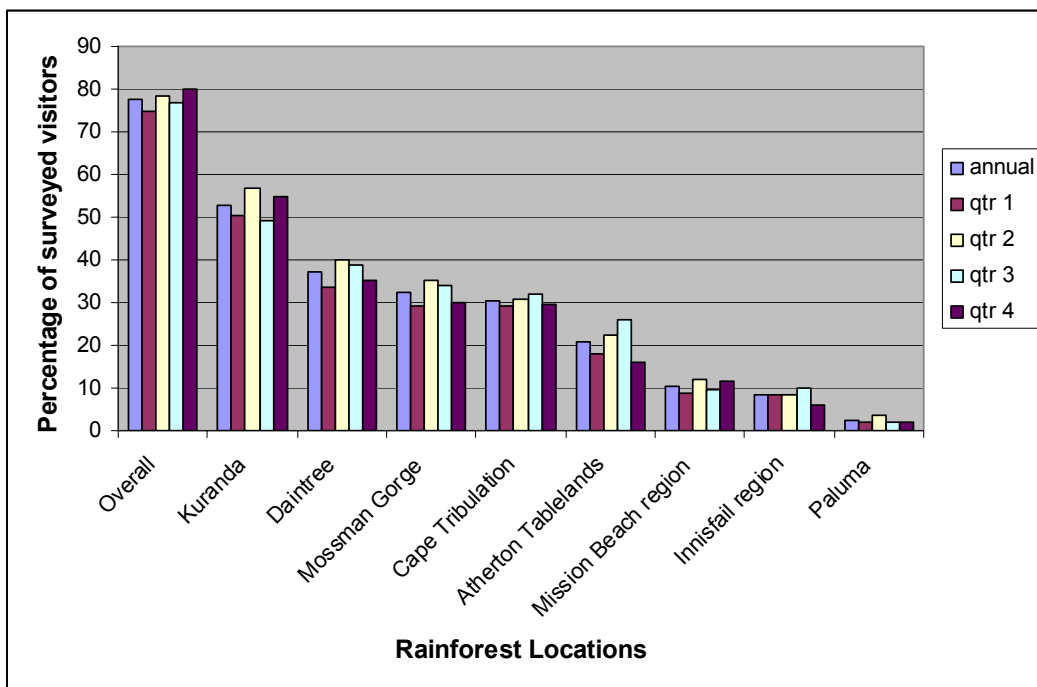


Figure 10: Rainforest locations visited by surveyed tourists.

Table 11: Comparison of rainforest locations visited by surveyed domestic and international visitors.

| Rainforest locations | Domestic visitors (%) | International visitors (%) |
|----------------------|-----------------------|----------------------------|
| Overall | 68.8 | 83.4 |
| Kuranda | 47.1 | 57.0 |
| Daintree | 37.2 | 37.2 |
| Mossman Gorge | 34.1 | 31.3 |
| Cape Tribulation | 27.6 | 32.7 |
| Atherton Tablelands | 27.8 | 16.5 |
| Mission Beach region | 8.8 | 11.8 |
| Innisfail region | 10.7 | 6.6 |
| Paluma | 1.4 | 3.1 |

Box 6: Profile of visitors to key rainforest locations

Below are the socio-demographic characteristics of visitors to key rainforest locations. Visitors surveyed in these locations were largely:

- **Kuranda:** Male (51.7%), North American (67.8%) and aged over 65 years (68.3%);
- **Atherton Tablelands:** Male (21.9%), European (28.4%) and aged 60-65 years (26.2%);
- **Cape Tribulation:** Female (32.0%), European (51.4%) and aged 30-39 years (35.2%);
- **Daintree:** Female (39.7%), European (48.6%) and aged 30-39 years (40.9%);
- **Mossman Gorge:** Female (34.5%), European (43.1%) and aged 30-39 years (35.9%);
- **Innisfail region:** Male (9.0%), Latin and/or South American (50.0%) and aged 40-49 years (9.2%);
- **Mission Beach region:** Female (11.4%), European (19.3%) and aged 20-29 years (16.9%); and
- **Paluma:** Male (3.1%), German (9.5%) and aged 20-29 years (3.4%).

Box 7: Who didn't visit the rainforest?

Those visitors (22.4%) who didn't visit the Wet Tropics rainforest were most likely to be:

- Males (23.9%);
- Domestic visitors (31.2%);
- Those aged 30-39 years (28.0%);
- Those working as a tradesperson (35.7%);
- Repeat visitors (35.7%);
- Those staying with friends or relatives (43.6%); and
- Those not visiting the Great Barrier Reef either (41.2%).

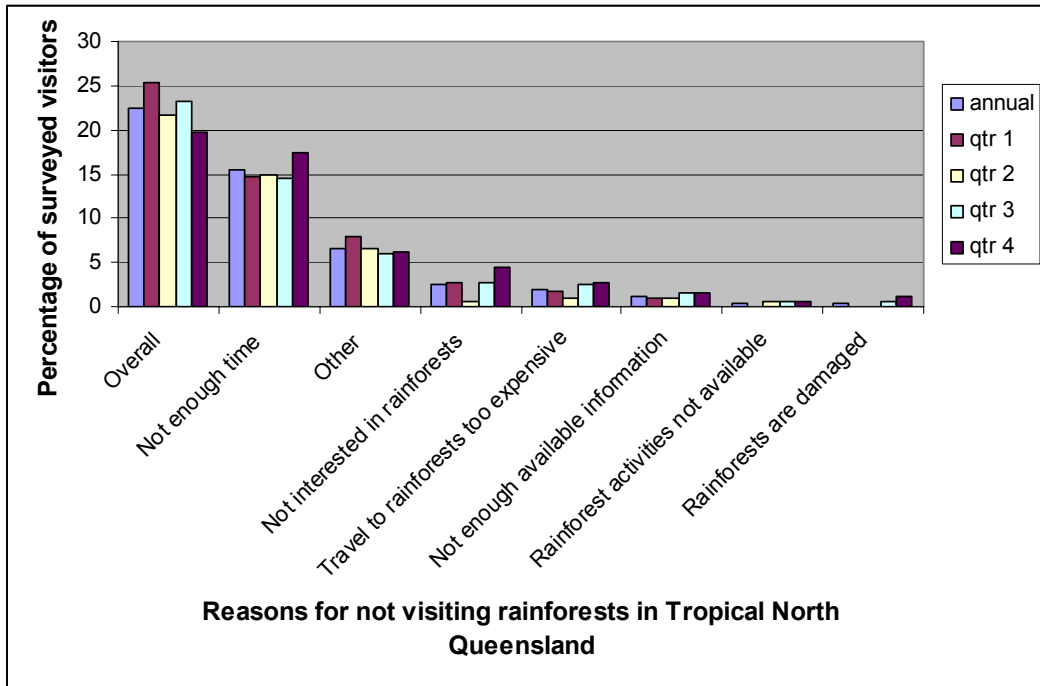


Figure 11: Visitors' reasons for not visiting the rainforests of North Queensland (as percentages of annual and quarterly samples).

Visits to the Great Barrier Reef

This section outlines the rates of visitation to the Great Barrier Reef. Figure 12 displays the overall rates of visitation, as well as the departure locations for reef visits. Overall, 70.9% of surveyed visitors visited the Great Barrier Reef on their trip to North Queensland with the majority of visitors departing from Cairns (46.6%) and to a lesser extent Port Douglas (20.6%). In terms of seasonality, there were some slight increases in overall visitation to the reef in Quarters 1 (January to March, 72.5%) and 4 (October to December, 74.8%), which is surprising given that this is the low season.

In general, international visitors were more likely to visit the Great Barrier Reef – at a rate almost double that of domestic visitors (see Table 12). Furthermore, as Table 12 illustrates, international visitors were more likely than domestic visitors to depart from places including Cairns (at a rate more than double), Port Douglas, Airlie Beach, *Other* and Townsville. Domestic visitors who were surveyed had higher rates than international visitors of choosing to depart from Mission Beach and Cooktown to visit the Great Barrier Reef during their trip to the region.

Figure 13 outlines the key reasons (overall and quarterly) given by respondents for not visiting the Great Barrier Reef. The most significant response was lack of time (12.7% of visitors) and previous visits to the Great Barrier Reef (8.5%).

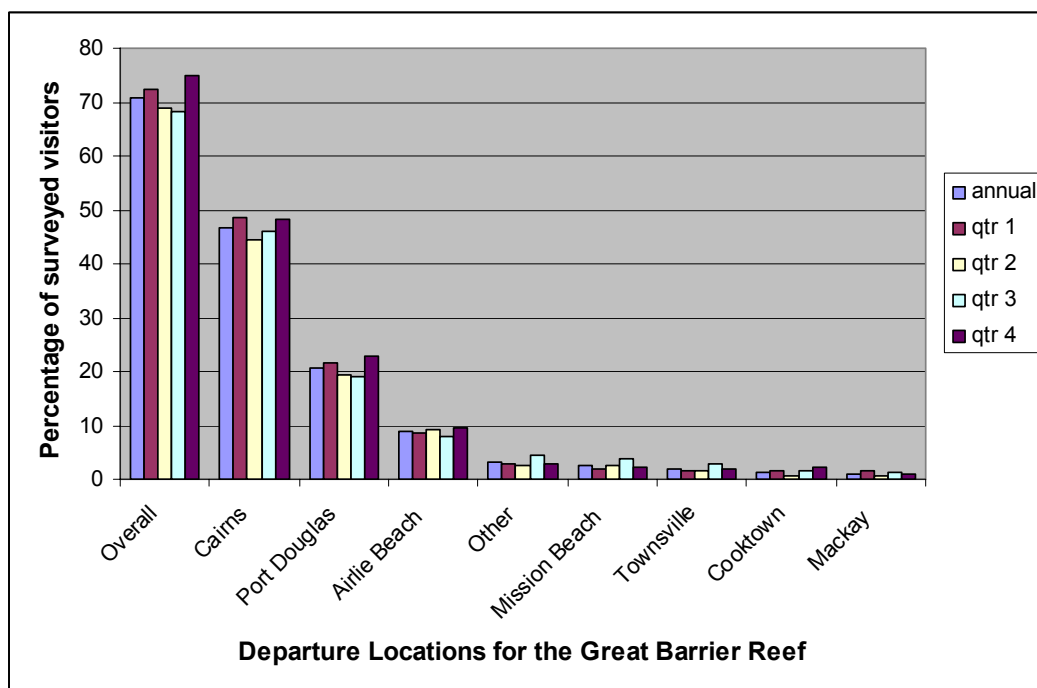


Figure 12: Departure locations for the Great Barrier Reef as used by surveyed visitors (as percentages of annual and quarterly samples).

Table 12: Comparison of departure locations for the Great Barrier Reef as used by surveyed domestic and international visitors.

| Rainforest locations | Domestic visitors (%) | International visitors (%) |
|----------------------|-----------------------|----------------------------|
| Overall | 44.5 | 88.5 |
| Cairns | 27.6 | 59.2 |
| Port Douglas | 15.5 | 24.1 |
| Airlie Beach | 1.2 | 13.7 |
| Other | 2.9 | 3.4 |
| Mission Beach | 2.6 | 2.5 |
| Townsville | 1.0 | 2.5 |
| Cooktown | 1.7 | 1.2 |
| Mackay | 0.2 | 1.6 |

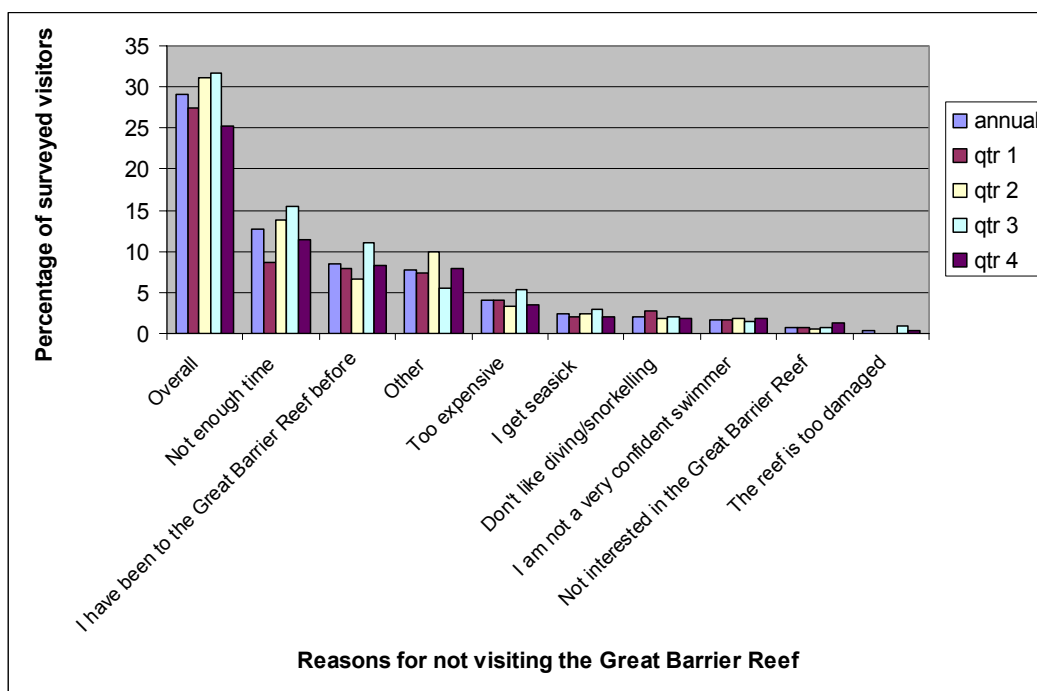


Figure 13: Visitors’ reasons for not visiting the Great Barrier Reef (as percentages of annual and quarterly samples).

Box 8: Who didn’t visit the reef?

Those surveyed visitors (29.1%) who didn’t visit the Great Barrier Reef were most likely to be:

- Females (29.5%);
- Domestic visitors (55.5%);
- Those aged 40-49 years (36.5%);
- Those working in domestic duties (43.2%);
- Repeat visitors (57.3%);
- Those staying with friends or relatives (69.4%); and
- Those not visiting the rainforest either (53.9%).

Box 9: Why such a staggering drop in domestic visitors to the Great Barrier Reef?

The 2007 survey results illustrate that only 44.5% of domestic visitors to North Queensland visited the Great Barrier Reef. So why is this figure so low, compared with 88.5% of international visitors surveyed who visited the Great Barrier Reef during their stay in the region?

In the survey, visitors could select as many reasons that applied for not visiting the Great Barrier Reef (or list their own in *other*). For this 55.5% of domestic visitors, reasons for not visiting the reef included:

- Not enough time (42.9%);
- I have been to the Great Barrier Reef before (28.6%);
- Too expensive (12.1%);
- I get seasick (8.1%);
- Don't like diving/snorkelling (6.9%);
- Other (26%);
- I am not a very confident swimmer (5.7%);
- Not interested in the Great Barrier Reef (2.6%); and
- The reef is too damaged (1.2%).

Rainforest activities

The exit survey also posed a question on visitors' level of interest in participating in a number of rainforest activities during their visit to North Queensland. Figure 14 outlines the mean of these activities, where 0 equals not all interested and 4 equals very interested. According to surveyed visitors, the rainforest activity incurring the most interest was a short rainforest walk (mean = 3.25), followed by a self-drive along a rainforest road (mean = 2.69). From Figure 14, seasonality did not greatly influence the interest in any of the rainforest activities.

International visitors were more interested than domestic visitors in participating in all of the listed rainforest activities other than a self-drive along a rainforest road. These comparisons are listed in Table 13.

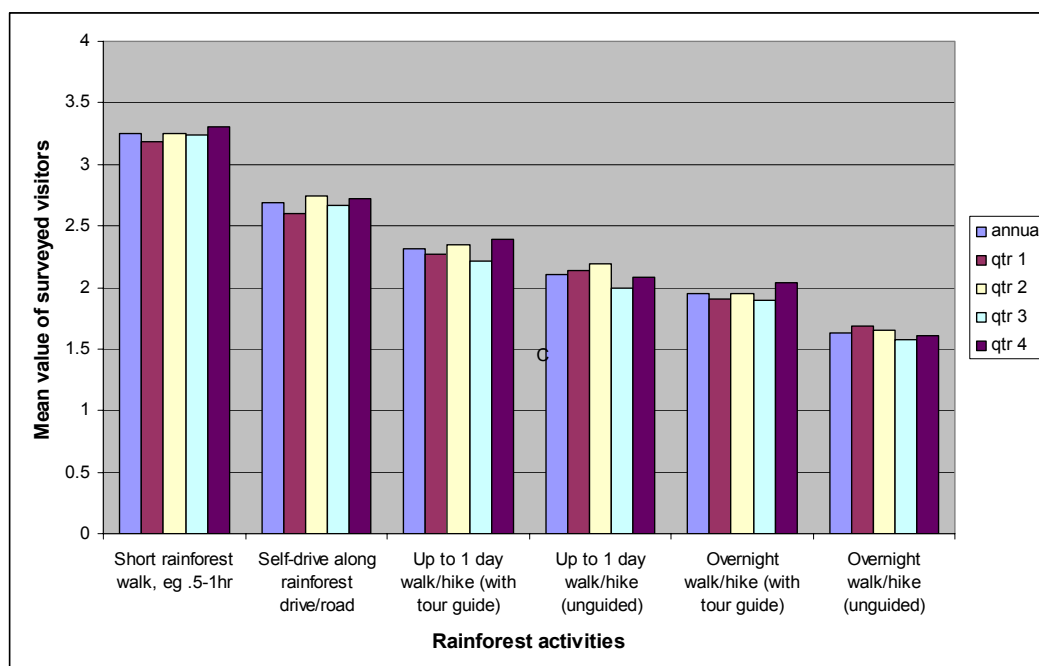


Figure 14: Visitors' level of interest in rainforest activities (as mean values of annual and quarterly samples).

Table 13: Comparison of surveyed domestic and international visitors' interests in rainforest activities.

| Rainforest activities | Domestic visitors (mean) | International visitors (mean) |
|---|--------------------------|-------------------------------|
| Short rainforest walk, e.g. ½ to 1 hour | 3.15 | 3.32 |
| Self-drive along rainforest drive/road | 2.96 | 2.49 |
| Up to 1 day walk/hike (unguided) | 1.99 | 2.51 |
| Up to 1 day walk/hike (with tour guide) | 2.06 | 2.12 |
| Overnight walk/hike (with tour guide) | 1.71 | 2.10 |
| Overnight walk/hike (unguided) | 1.61 | 1.64 |

Box 10: Profile of one-day unguided hikers

The results from the survey revealed that visitors most interested in a one-day unguided hike were from Scandinavian (mean = 2.40), German (mean = 2.41) and European (mean = 2.35). Those least interested in a one-day unguided hike were from the United Kingdom and Ireland (mean = 1.85) and Latin and South America (mean = 1.67). From the visitors surveyed those most interested in a one-day unguided hike through the rainforest were travelling alone (mean = 2.40) and with friends (mean = 2.22). They were also those within the age group of 20-29 years (mean = 2.25) and 30-39 years (mean = 2.23).

Budget of surveyed visitors and where they travelled during their trip

The exit survey posed a question on visitors' overall budget for their travel party for this trip (including airfares, accommodation, tours and all other expenses). The average overall budget for surveyed visitors was \$3,748 AUD. This average amount budgeted for on average 1.83 adults and 0.2 children. Table 14 provides a breakdown of the overall budgets for domestic and international visitors, and visitor occupation.

One of the final questions in the exit survey related to where visitors with access to either a rental car or a private vehicle traveled through or to during their trip in North Queensland. Figure 15 shows the percentage of respondents who had traveled to the locations noted (annually and quarterly). The most popular places included Port Douglas (36.0%), Kuranda (26.7%) and Atherton (17.4%). Interestingly, these most popular places dropped in Quarter 1 (January to March, 29.8%, 18.7% and 14.4% respectively), and Innisfail and Mission Beach rose slightly above their annual averages during this same period.

Table 15 shows the gender of those surveyed, and the locations that they travelled through or to on their trip in North Queensland.

The only most common place to drive through or to for international visitors surveyed, compared with their domestic visitor counterpart, was Mission Beach. For all other locations listed in Table 16, domestic visitors drove through or to a variety of locations throughout North Queensland at a much higher rate than international visitors.

Tables 17, 18 and 19 all provide comparisons between the locations that visitors have travelled through or to on their trip to North Queensland, and their occupation (Table 17), age (Table 18) and the information sources used for this trip (Table 19).

Table 14: Overall trip budget for surveyed visitors according to origin and occupation.

| Origin or occupation | Overall budget (\$AUD) | Adults | Children |
|-----------------------------|-------------------------------|---------------|-----------------|
| International | 4,071 | 1.82 | 0.13 |
| Domestic | 3,280 | 1.84 | 0.30 |
| Manual/Factory Work | 5,254 | 1.62 | 0.15 |
| Retired/Semi-retired | 5,082 | 2.10 | 0.04 |
| Self-employed | 4,211 | 1.90 | 0.34 |
| Retail | 4,101 | 2.28 | 0.04 |
| Tradesperson | 3,914 | 1.71 | 0.32 |
| Professional | 3,635 | 1.82 | 0.20 |
| Domestic duties | 3,602 | 2.00 | 0.61 |
| Other | 3,325 | 1.75 | 0.19 |
| Management | 3,276 | 1.91 | 0.32 |
| Office-Clerical | 3,182 | 1.79 | 0.21 |
| Student | 3,095 | 1.51 | 0.22 |
| Public Service | 2,944 | 1.87 | 0.10 |
| Service Industry | 2,576 | 1.62 | 0.07 |

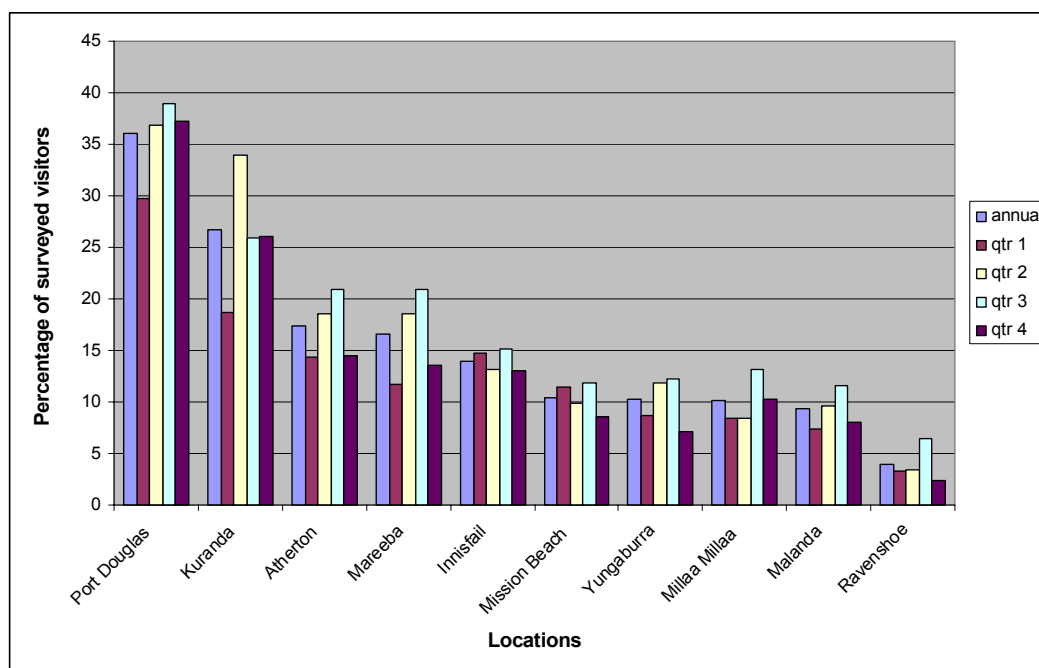


Figure 15: Locations travelled through or to during visitors' trips to North Queensland (as percentages of annual and quarterly samples).

Table 15: Comparison of visitors' chosen locations to travel through or to in North Queensland, and gender.

| Locations | Female visitors (%) | Male visitors (%) |
|---------------|---------------------|-------------------|
| Port Douglas | 35.9 | 36.3 |
| Kuranda | 24.9 | 29.1 |
| Atherton | 16.5 | 18.5 |
| Mareeba | 15.8 | 17.7 |
| Innisfail | 12.2 | 16.4 |
| Mission Beach | 9.8 | 11.3 |
| Yungaburra | 9.9 | 10.6 |
| Millaa Millaa | 9.5 | 10.9 |
| Malanda | 8.3 | 10.6 |
| Ravenshoe | 3.6 | 4.5 |

Table 16: Comparison of locations travelled through or to by surveyed domestic and international visitors.

| Locations | Domestic visitors (%) | International visitors (%) |
|---------------|-----------------------|----------------------------|
| Port Douglas | 46.9 | 28.9 |
| Kuranda | 33.3 | 22.5 |
| Atherton | 27.1 | 10.9 |
| Mareeba | 25.9 | 10.4 |
| Innisfail | 17.2 | 11.8 |
| Mission Beach | 9.1 | 11.4 |
| Yungaburra | 14.3 | 7.5 |
| Millaa Millaa | 12.4 | 8.7 |
| Malanda | 13.3 | 6.7 |
| Ravenshoe | 5.7 | 2.9 |

Table 17: Comparison of locations travelled through or to by visitors, and their occupation.

| Locations | Professional (%) | Retired / Semi-retired (%) | Student (%) | Self-employed (%) | Management (%) | Office / Clerical (%) | Other (%) | Public service (%) | Trades (%) | Service industry (%) | Domestic duties (%) |
|---------------|------------------|----------------------------|-------------|-------------------|----------------|-----------------------|------------|--------------------|-------------|----------------------|---------------------|
| Port Douglas | 33.6 | 32.7 | 34.0 | 44.6 | 42.9 | 34.5 | 32.1 | 32.3 | 46.5 | 37.5 | 56.8 |
| Kuranda | 25.5 | 27.5 | 25.6 | 28.5 | 31.6 | 18.4 | 25.6 | 26.2 | 27.9 | 22.5 | 48.6 |
| Atherton | 17.0 | 16.7 | 13.9 | 22.3 | 14.3 | 13.8 | 23.1 | 23.1 | 18.6 | 5.0 | 35.1 |
| Mareeba | 15.7 | 18.2 | 12.2 | 20.2 | 14.3 | 12.6 | 20.5 | 16.9 | 16.3 | 10.0 | 40.5 |
| Innisfail | 11.3 | 13.4 | 10.9 | 20.0 | 12.2 | 12.6 | 17.9 | 12.3 | 27.9 | 7.5 | 18.9 |
| Mission Beach | 8.8 | 7.8 | 11.8 | 14.6 | 13.3 | 6.9 | 10.3 | 7.7 | 23.3 | 7.5 | 10.8 |
| Yungaburra | 11.3 | 11.2 | 9.2 | 10.0 | 5.1 | 11.5 | 15.4 | 9.2 | 2.3 | 0.0 | 16.2 |
| Millaa Millaa | 10.4 | 7.8 | 10.5 | 13.1 | 5.1 | 8.0 | 15.4 | 12.3 | 9.3 | 7.5 | 18.9 |
| Malanda | 9.7 | 9.3 | 9.2 | 12.3 | 3.1 | 5.7 | 10.3 | 12.3 | 9.3 | 5.0 | 8.1 |
| Ravenshoe | 3.8 | 4.8 | 4.2 | 5.4 | 0.0 | 5.7 | 7.7 | 3.1 | 0.0 | 0.0 | 2.7 |

Table 18: Comparison of locations travelled through or to by visitors and their age.

| Locations | Under 20 yrs (%) | 20-29 yrs (%) | 30-39 yrs (%) | 40-49 yrs (%) | 50-59 yrs (%) | 60-65 yrs (%) | Over 65 yrs (%) |
|---------------|------------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| Port Douglas | 45.4 | 28.4 | 35.2 | 42.8 | 40.4 | 37.5 | 33.3 |
| Kuranda | 34.0 | 20.6 | 25.6 | 32.9 | 31.7 | 22.5 | 27.8 |
| Atherton | 16.5 | 15.9 | 17.3 | 22.4 | 17.5 | 14.4 | 18.9 |
| Mareeba | 14.4 | 13.8 | 16.9 | 19.1 | 18.3 | 13.8 | 20.6 |
| Innisfail | 10.3 | 13.4 | 15.6 | 17.1 | 17.5 | 10.0 | 10.6 |
| Mission Beach | 8.2 | 14.4 | 9.6 | 11.2 | 11.3 | 6.9 | 7.2 |
| Yungaburra | 10.3 | 8.8 | 9.0 | 14.5 | 10.4 | 10.0 | 11.1 |
| Millaa Millaa | 8.2 | 9.7 | 11.6 | 11.8 | 10.8 | 9.4 | 7.8 |
| Malanda | 8.2 | 7.8 | 10.3 | 13.2 | 9.2 | 9.4 | 7.8 |
| Ravenshoe | 4.1 | 3.1 | 2.3 | 5.9 | 4.6 | 5.0 | 5.0 |

Table 19: Comparison of locations travelled through or to by visitors, and the information sources used.

| Locations | Friends and relatives (%) | Guidebook (%) | Internet (%) | Travel agent (%) | Been before (%) | TV documentary (%) | Other (%) | Ads in print (%) | Visitor centre (%) | Ads on TV/radio (%) |
|---------------|---------------------------|---------------|--------------|------------------|-----------------|--------------------|-----------|------------------|--------------------|---------------------|
| Port Douglas | 41.7 | 34.8 | 41.5 | 24.7 | 42.1 | 39.8 | 20.0 | 30.3 | 51.6 | 42.6 |
| Kuranda | 30.0 | 23.9 | 29.4 | 20.7 | 29.5 | 23.0 | 22.9 | 30.3 | 35.5 | 25.5 |
| Atherton | 18.3 | 15.5 | 19.3 | 8.4 | 24.5 | 21.2 | 17.1 | 15.2 | 33.9 | 21.3 |
| Mareeba | 18.3 | 12.9 | 19.1 | 8.7 | 23.0 | 17.0 | 18.1 | 15.4 | 35.5 | 21.3 |
| Innisfail | 15.7 | 16.4 | 16.1 | 10.0 | 16.9 | 17.7 | 11.4 | 10.6 | 32.3 | 17.0 |
| Mission Beach | 12.3 | 13.3 | 11.8 | 7.4 | 12.6 | 9.7 | 5.7 | 7.6 | 25.8 | 10.6 |
| Yungaburra | 10.3 | 9.4 | 11.3 | 4.7 | 15.1 | 11.5 | 10.5 | 6.1 | 27.4 | 10.6 |
| Millaa Millaa | 10.5 | 10.5 | 11.6 | 6.7 | 10.8 | 11.5 | 9.5 | 4.5 | 27.4 | 12.8 |
| Malanda | 9.9 | 8.1 | 10.1 | 5.0 | 12.6 | 13.3 | 8.6 | 6.1 | 19.4 | 17.0 |
| Ravenshoe | 3.4 | 3.3 | 4.0 | 2.7 | 5.8 | 1.8 | 3.8 | 1.5 | 14.5 | 4.3 |

Box 11: Visitor profile at Port Douglas

The results from the survey revealed visitors who travelled through or to Port Douglas were:

- Domestic visitors (46.9%), compared with only 28.9% of international visitors (with exceptions such as those from New Zealand, 52.4%);
- Equally male (36.3%) and female (35.9%);
- Those aged less than 20 years (45.4%) and 40-49 years (42.8%);
- Those employed in domestic duties (56.8%);
- Those travelling as a family with children (55.4%);
- Repeat visitors (42.4%);
- Staying at a Bed 'n' Breakfast (85.7%); and
- Those renting a car to travel around the region (80.4%).

Overall satisfaction with visit to Tropical North Queensland

Visitors were asked to rate the overall quality of their visit to the region. This satisfaction rating was measured on a scale of 1 (not at all satisfactory) to 10 (highly satisfactory). The overall annual mean score for 2007 was 8.46, as shown in Figure 16. This score drops slightly in Quarter 3 (July to September) to 8.38 (out of 10). Furthermore, in comparing domestic and international surveyed visitors, domestic visitors to the region provided a lower overall annual score (8.34) than international visitors (8.55).

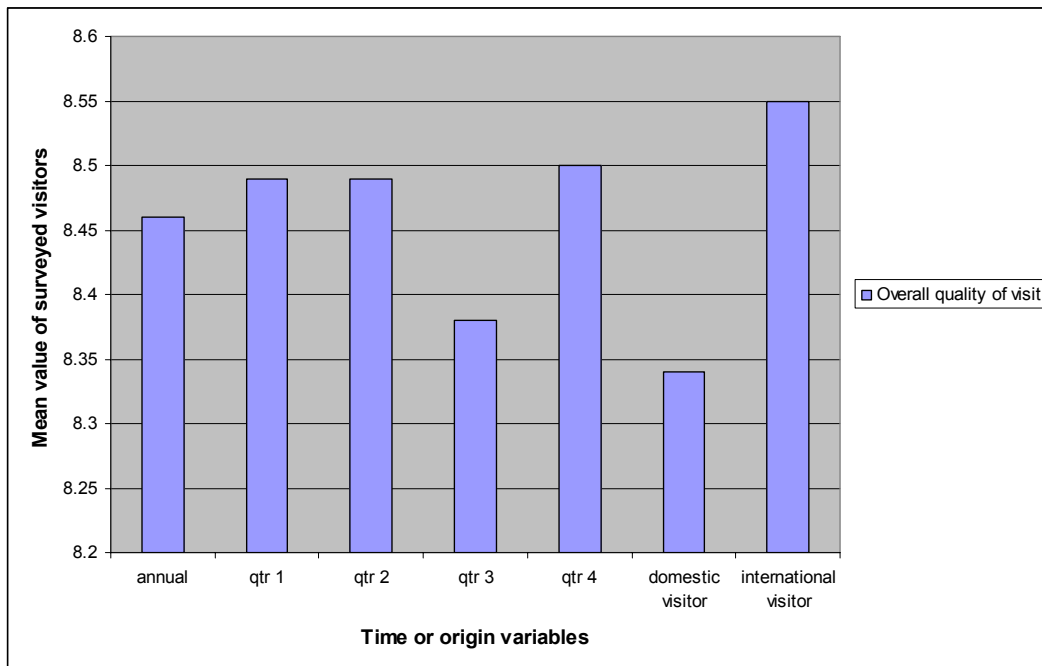


Figure 16: Overall surveyed visitors' satisfaction with their trip to TNQ (as means of annual, quarterly, domestic visitor and international visitor samples).

Publication List – Year One

Quarterly ‘Tourism Barometers’

2007 Tourist Exit Survey Barometers – Quarters 1, 2, 3 and 4

Available for download: http://www.rrrc.org.au/publications/tourism_barometers.html

Technical Reports

Prideaux, B. and Falco-Mammone, F. (2007) *Rainforest Tourism: Establishment of a Visitor Monitoring Structure*. Unpublished report to the Marine and Tropical Sciences Research Facility. Reef and Rainforest Research Centre Limited, Cairns (17pp.).

Available for download: http://www.rrrc.org.au/mtsrfr/theme_4/project_4_9_2.html

For information about this project, contact the project team:

Prof Bruce Prideaux, Project Leader
Bruce.Prideaux@jcu.edu.au Phone (07) 4042 1039

Dr Karen McNamara, Project Manager
Karen.McNamara@jcu.edu.au Phone (07) 4042 1762

These and related reports are available for download from the
Marine and Tropical Sciences Research Facility website:

<http://www.rrrc.org.au/publications/index.html>

Appendix A

Survey Instrument

Q1. Are you:

- Male Female

Q2. Where do you usually live?

Australia (postcode) _____ Overseas (country) _____

Q3. Please indicate your age group:

- Under 20 yrs 20 to 29 30 to 39 40 to 49 50 to 59
 60 to 65 Over 65 yrs

Q4. How would you best describe your occupation: (Please choose only one)

- Self-employed Professional Retail Domestic duties
 Management Office/Clerical Public Service Manual/Factory worker
 Service Industry Tradesperson Student Retired / Semi-retired
 Other: _____

Q5. Which of these best describes your immediate travel party:

- Alone Couple (partner/spouse) Tour group Club
 Friends Family with children Relatives

Q6. Is this your first visit to Tropical North Queensland (TNQ)?

- Yes No *If No, how many times have you visited TNQ?* _____

Q7. How many nights do you intend spending in TNQ? _____ nights

Q8. What is your main type of accommodation during your visit to TNQ?

- Hotel/motel Resort Backpackers hostel Holiday apartment/unit
 Caravan park/cabin Camping Bed & breakfast Friends/relatives

Q9. What is your main type of transportation to Tropical North Queensland (TNQ)?

- Air Private vehicle Rented car Rented campervan/caravan
 Bus/coach Rail Cruise boat Other: _____

Q10. Where did you find out about Tropical North Queensland? (Select all that apply)

- Internet Tourist guide books Friends/family Advertisements in print
 Travel Agent TV documentary Visitor centres Advertisements on TV/radio
 Been before Other (please specify): _____

Q11. Please tell us where you spent your last holiday: _____

Q12. Please list up to 3 other destinations you considered while planning your current holiday:

(1) _____ (2) _____ (3) _____

Q13. Please indicate how important each of the features was in your decision to visit TNQ:

| | Not at all | Unimportant | Neutral | Important | Very Important |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Visit the Great Barrier Reef | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Visit the rainforest | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| See Australian wildlife | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Experience Aboriginal culture | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Climate | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The price matched my budget | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Experience the natural environment | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Rest & relax | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Snorkelling & diving | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Spend time with my family | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Meet new people | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Visit the beaches | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tropical fruits | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Visiting friends & relatives | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Experience the outback | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Go shopping | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Visit the islands | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Adventure activities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Business/conference/meeting | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reef seafood | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tropical fruit wines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Q14. Did you visit rainforests during this trip to Tropical North Queensland?

Yes

➔ At which locations?

- Kuranda
- Atherton Tablelands
- Cape Tribulation
- Daintree
- Mossman Gorge
- Innisfail/Wooroonooran/Palmerston
- Mission Beach/Tully/Cardwell
- Paluma (near Townsville)

No

➔ Why not? (Choose as many as apply)

- Not enough time
- Not interested in rainforests
- Travel to rainforests too expensive
- Not enough information available
- The rainforest activities I wanted to do were not available
- Rainforests are damaged
- Other – please specify: _____

Q15. Did you visit the Great Barrier Reef during this trip to Tropical North Queensland?

- | | |
|---|--|
| <p><input type="radio"/> Yes → Where did you depart from?</p> <p><input type="radio"/> Cook Town</p> <p><input type="radio"/> Port Douglas</p> <p><input type="radio"/> Cairns</p> <p><input type="radio"/> Mission Beach</p> <p><input type="radio"/> Townsville</p> <p><input type="radio"/> Airlie Beach</p> <p><input type="radio"/> Mackay</p> <p><input type="radio"/> Other – please specify:</p> <hr/> | <p><input type="radio"/> No → Why not? (Choose as many as apply)</p> <p><input type="radio"/> Not enough time</p> <p><input type="radio"/> I get seasick</p> <p><input type="radio"/> I have been to Great Barrier Reef before</p> <p><input type="radio"/> Not interested in the Great Barrier Reef</p> <p><input type="radio"/> Too expensive</p> <p><input type="radio"/> The reef is too damaged</p> <p><input type="radio"/> I am not a very confident swimmer</p> <p><input type="radio"/> Don't like diving/snorkelling</p> <p><input type="radio"/> Other – please specify:</p> <hr/> |
|---|--|

Q16. Below is list of potential rainforest activities. Please indicate how interested you are in participating in these activities during your holidays in the region.

| <u>Rainforest Activities</u> | Not at all | A Little Interested | Somewhat Interested | Very Interested |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Self-drive along a rainforest drive/road | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Short rainforest walk - e.g. ½ hour to 1 hour | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Up to 1 day walk/hike – unguided | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Up to 1 day walk/hike – with tour guide | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overnight walk/hike – unguided | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overnight walk/hike – with tour guide | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Q17. Thinking about this trip to the TNQ region, what is the overall budget for your travel party for this trip (including airfares, accommodation, tours, & all other expenses)?

AU\$ _____ How many people does this amount budget for? Adults ____ Children ____

Q18. If you used a private or rented vehicle during your trip to TNQ, please indicate which of the following locations that you have travelled through/to during this holiday:

- | | | | | |
|-------------------------------------|------------------------------------|---------------------------------|----------------------------------|-------------------------------------|
| <input type="radio"/> Kuranda | <input type="radio"/> Mareeba | <input type="radio"/> Atherton | <input type="radio"/> Malanda | <input type="radio"/> Millaa Millaa |
| <input type="radio"/> Mission Beach | <input type="radio"/> Port Douglas | <input type="radio"/> Innisfail | <input type="radio"/> Yungaburra | <input type="radio"/> Ravenshoe |

Q19. On the scale below, where 1 = Not At All Satisfactory and 10 = Highly Satisfactory, how would you rate the overall quality of your visit to this region?

- | | | | | | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Further information

Marine and Tropical Sciences Research Facility
PO Box 1762
CAIRNS QLD 4870

or

Marine and Tropical Sciences Research Facility
PO Box 772
TOWNSVILLE QLD 4810

This document is available for download at <http://www.rrrc.org.au/publications>

Credits: **Southern cassowary** Wet Tropics Management Authority; **Hill Inlet in the Whitsundays** Department of Foreign Affairs and Trade - Overseas Information Branch; **Butterfly fish** Robert Thorn; **Rainforest fruits** Wet Tropics Management Authority; **Cover image strip** Shannon Hogan, Adelpha Publishing and Design.