



Marine and Tropical Sciences Research Facility

# Tourist Exit Survey Second Annual Report: January - December 2008

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



JAMES COOK  
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AUSTRALIA





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

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## Acronyms and abbreviations

<b>MTSRF</b> .....	Marine and Tropical Sciences Research Facility
<b>qtr</b> .....	Quarter
<b>TV</b> .....	Television
<b>UK</b> .....	United Kingdom
<b>USA</b> .....	United States of America
<b>yrs</b> .....	Years

## Acknowledgements

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

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Lastly, to the many research assistants that have put a large amount of time and energy into this project, Jonathan Sibtain, Bruce Dale and Daphne Yang, many thanks for your hard work.

# 1. Introduction

This annual report is a culmination of research conducted in 2008 through visitor exit surveys at the domestic and international terminals of Cairns Airport. This research was funded through the Australian Government's Marine and Tropical Sciences Research Facility (MTSRF). The exit survey explores both reef and rainforest tourism in North Queensland and as such this research has the potential to add another dimension and context to the following MTSRF 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 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 analysis of trends that are occurring in arrival patterns, motivations and experiences.

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

Throughout the annual report, data is provided on a quarterly and annual basis. Moreover, an annual comparison is provided with the 2007 data<sup>1</sup>. The quarters of data collection were January to March; April to June; July to September and October to December. A total of 1,510 surveys were completed by tourists at the Cairns Airport during 2008.

The results in the annual report are broadly grouped into the following three thematic areas:

- The socio-demographic characteristics of respondents;
- The motivations and behaviours of respondents; and
- The experiences and satisfaction of respondents.

The individual quarterly data that has already been released can be accessed at the MTSRF website<sup>2</sup>. This annual report analyses data from January to December 2008.

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<sup>1</sup> See McNamara, K. and Prideaux, B. (2008) [Tourist Exit Survey 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.](#)

<sup>2</sup> See [http://www.rrrc.org.au/publications/tourism\\_barometers.html](http://www.rrrc.org.au/publications/tourism_barometers.html)

## 2. Methodology

The primary method used for this research was self-completed surveys collected at the Cairns Airport. This site was selected because it provided a convenient place to collect exit surveys in a period where most visitors approached to take part in the survey had time to complete 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 individual places 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 a useful experience that allowed 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 start 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 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. 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.

### 2.1 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 datasets 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, 47% of visitors used air transport, 48% used private or company vehicle, and five percent made up other categories.

A second limitation is that visitors who are not proficient in English or Chinese were not surveyed. The concern here is that Japanese visitors who constitute a significant market for the region are not represented in this report.

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

### 3. 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 Airport.

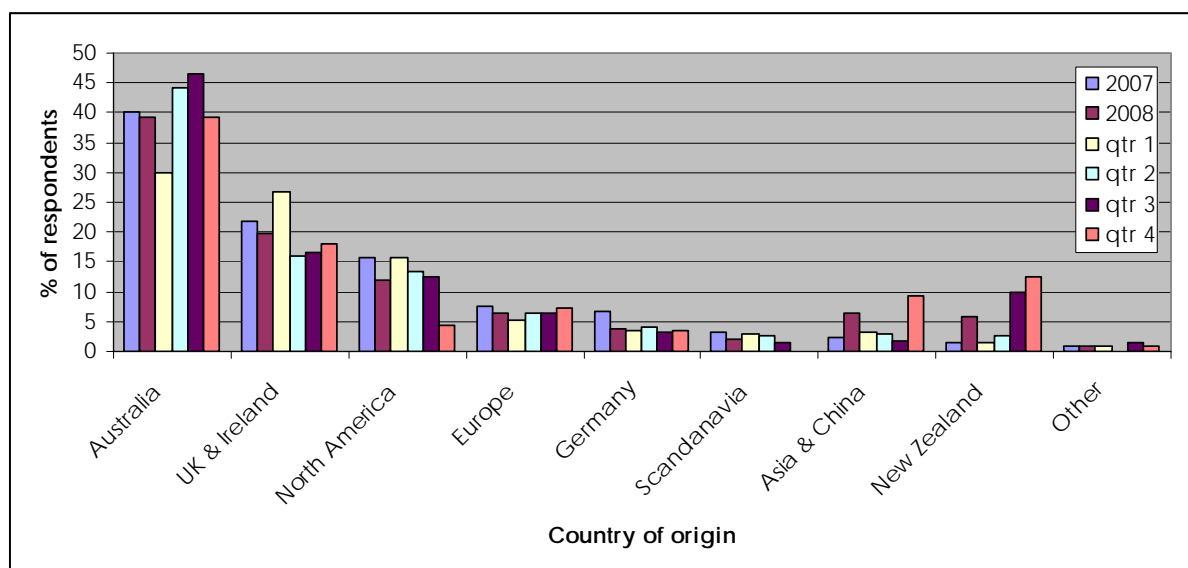
#### 3.1 Surveyed visitors' socio-demographic characteristics

##### *Gender and origin of surveyed visitors*

On a gender basis, 53.8% of completed surveys were collected from females (57.1% in 2007), compared to 46.2% from males (42.9% in 2007). This rate remained largely consistent throughout the year, with only a slight drop in females completing the survey in Quarter 4 (Oct-Dec; 48.1%).

On an annual basis, 39.5% of respondents were domestic visitors (40.2% in 2007) while 60.5% of respondents were international visitors (59.8% in 2007). This rate varied throughout the year. The percentage of domestic visitors completing the surveys dropped in Quarters 1 (Jan-Mar; 29.9%) and 4 (Oct-Dec; 39.6%), and increased substantially during Quarters 2 (Apr-Jun; 44.3%) and 3 (Jul-Sep; 46.5%), mirroring the same trend in 2007. The survey therefore follows the trend of the 'high season' in North Queensland, particularly for domestic visitors, as being the period April through to September.

Figure 1 shows visitor origins for 2008. After domestic visitors, the second largest group of respondents was from the United Kingdom (UK) and Ireland, followed by North America.

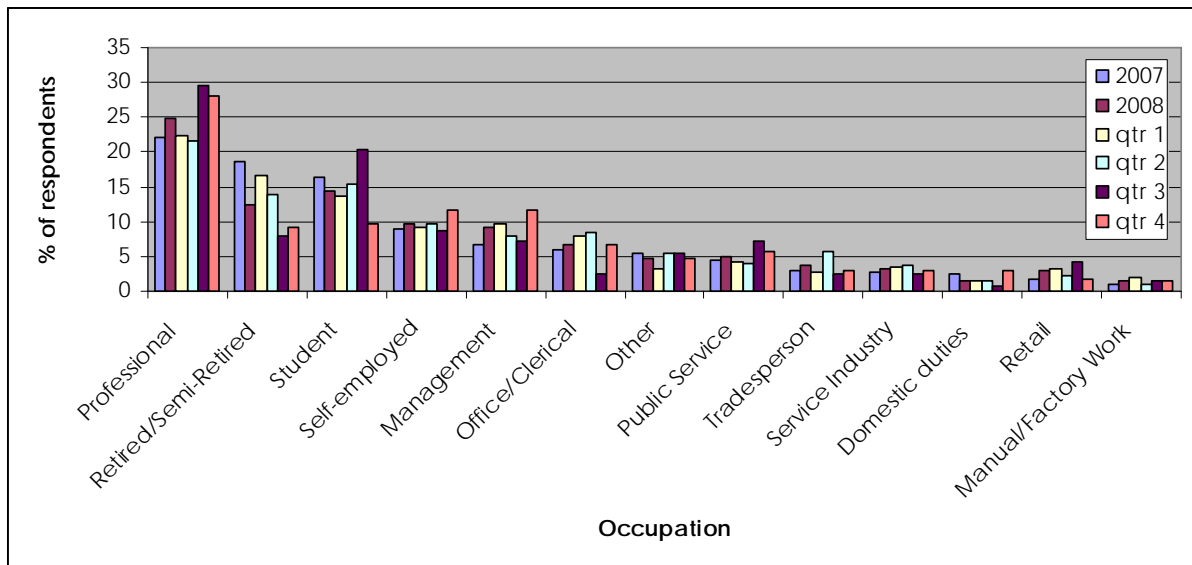


**Figure 1:** Origin of visitors surveyed (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

##### *Occupation*

By occupation the largest group of respondents were professionals (24.8%; 22.0% in 2007), followed by students (14.5%; 16.5% in 2007) and retirees/semi-retirees (12.4%; 18.6% in 2007). There were a number of seasonal variations in the quarterly results, as illustrated in Figure 2. For instance, there was an increase in the percentage of professionals surveyed in

Quarter 3 (Jul-Sep; 29.6%), while the percentage of students and retirees/semi-retirees rose during Quarters 1 (Jan-Mar; 13.6% and 16.6%) and 2 (Apr-Jun; 15.4 and 13.8%).



**Figure 2:** Occupation of visitors surveyed (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

Table 1 compares the occupations of both domestic and international respondents. Table 1 demonstrates that the number of retirees/semi-retirees, managers and students are higher in the international market in 2008, compared with professionals, retirees/semi-retirees, managers, clerics, service industry employees and students in 2007.

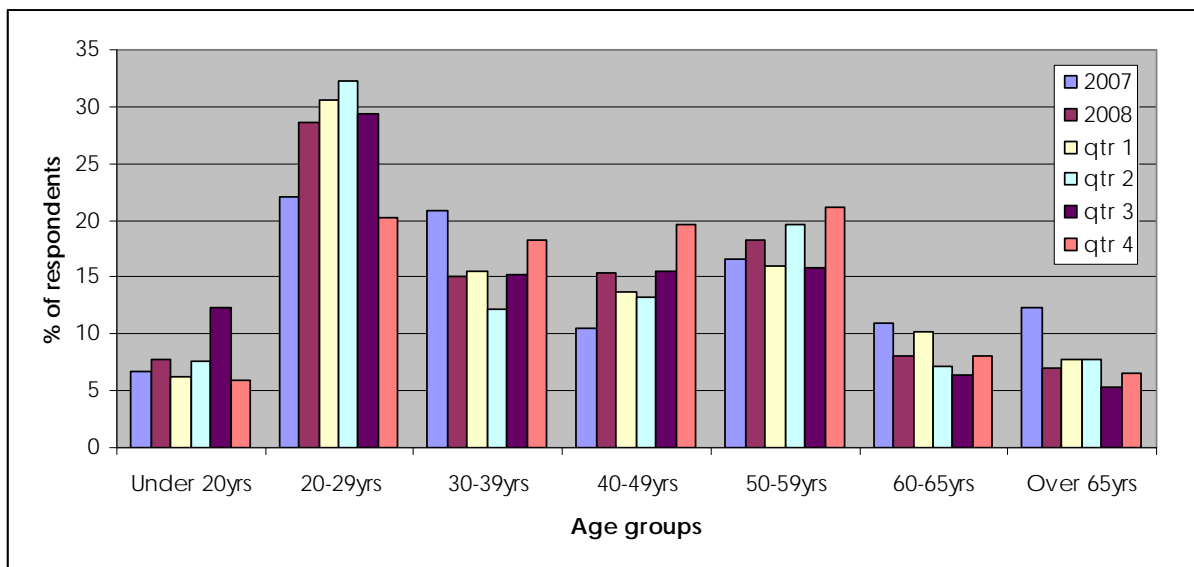
**Table 1:** Comparison of surveyed domestic and international visitors' occupations in 2007 and 2008.

Occupation	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Professional	20.8	<b>23.1</b>	<b>29.1</b>	21.9
Retired/Semi-Retired	17.3	<b>19.6</b>	11.2	<b>13.3</b>
Student	11.6	<b>19.8</b>	5.1	<b>20.4</b>
Self-employed	<b>13.7</b>	5.8	<b>10.9</b>	8.9
Management	6.2	<b>7.2</b>	9.1	<b>9.4</b>
Office/Clerical	5.5	<b>6.4</b>	<b>7.4</b>	6.4
Other	<b>5.9</b>	5.1	<b>4.7</b>	4.6
Public Service	<b>4.7</b>	4.3	<b>7.0</b>	3.7
Tradesperson	<b>4.3</b>	2.0	<b>3.9</b>	3.6
Service Industry	2.2	<b>3.0</b>	<b>3.3</b>	3.2
Domestic Duties	<b>4.2</b>	1.5	<b>1.8</b>	1.6
Retail	<b>2.6</b>	1.3	<b>4.9</b>	1.6
Manual/Factory Work	<b>1.0</b>	0.9	<b>1.6</b>	1.4

### Age of surveyed visitors

Figure 3 presents the overall annual age of respondents in 2007 and 2008, as well as data for each quarter in 2008. The combined brackets of 20-29 and 30-39 years (of age) make up over 43% of the sample (over 42% in 2007). This combined bracket fluctuates during the quarters. In Quarters 1 (Jan-Mar) and 2 (Apr-Jun), there was a strong increase in visitors aged 20-29 years (30.6% and 32.3% 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 comparatively. For example, in Quarter 4 (Oct-Dec), only 20.3% of visitors surveyed were aged 20-29 years, whereas 18.2% 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 years, 20-29 years, 60-65 year and over 65 years age groups in 2008 (and the 20-29 years and over 65 years age groups in 2007).



**Figure 3:** Age of visitors surveyed (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

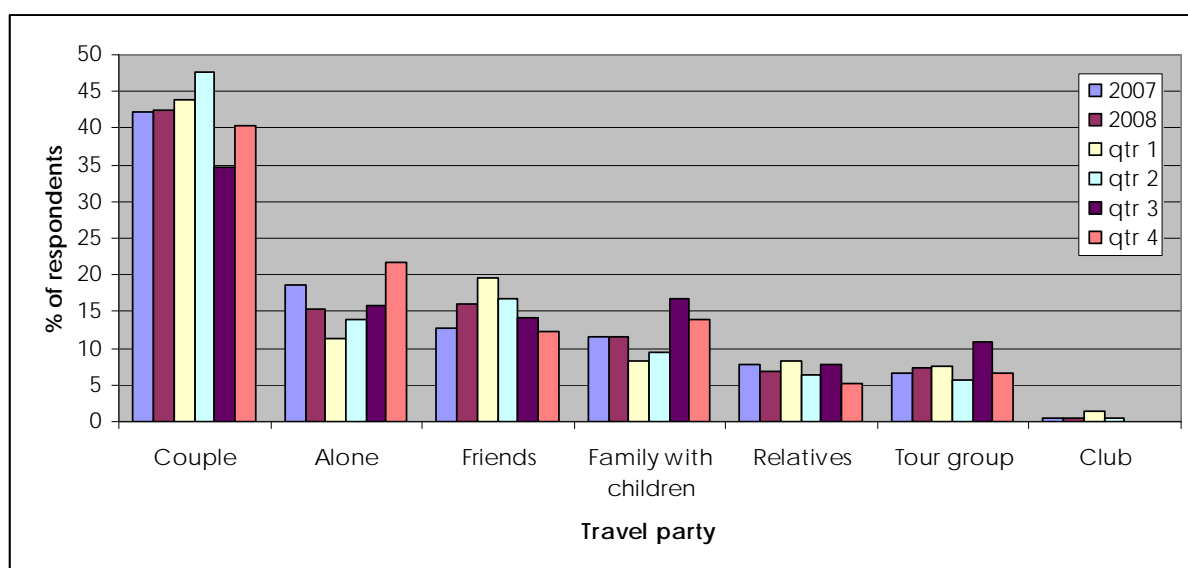
**Table 2:** Comparison of age groups of surveyed domestic and international visitors in 2007 and 2008.

Age group	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Under 20 yrs	8.4	5.5	4.2	9.9
20-29 yrs	16.0	26.1	24.5	31.2
30-39 yrs	21.5	20.4	16.8	13.5
40-49 yrs	14.1	8.0	17.7	13.8
50-59 yrs	17.6	15.8	23.1	15.4
60-65 yrs	11.4	10.9	8.1	8.2
Over 65 yrs	11.0	13.3	5.6	8.0

### 3.2 *Surveyed visitors' travel behaviour and motivations for travel*

#### *Travel party*

The largest travel party sector were couples (42.4%; 42.1% in 2007); a rate which remained consistent throughout the year (Figure 4). Following couples, the most significant travel parties were visitors travelling alone (15.3%; 18.6% in 2007), which peaked in Quarter 4 (Oct-Dec; 21.8%), and those travelling with friends (16.0%; 12.8% in 2007), which peaked in Quarter 1 (Jan-Mar; 19.5%). Results indicate that travel parties comprising a family with children (overall 11.5%; also 11.5% in 2007) exhibited a strong seasonal trend, with sharp declines in Quarter 1 (Jan-Mar; 8.2%) and higher rates through Quarters 3 (Jul-Sep; 16.8%) and 4 (Oct-Dec; 14.0%).



**Figure 4:** Travel party of visitors surveyed (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

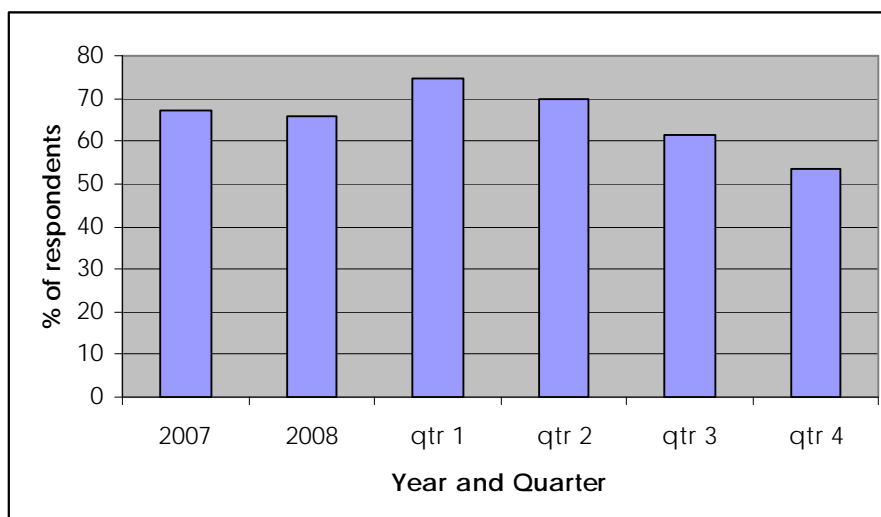
Based on travel party, more domestic visitors travelled as a couple than internationals in both 2007 and 2008. A similar pattern was identified with respondents travelling alone and travel parties consisting of a family with children in both 2007 and 2008 (see Table 3). International travellers in both 2007 and 2008 were more likely to travel as friends compared to domestic visitors.

**Table 3:** Comparison of chosen travel parties of surveyed domestic and international visitors in 2007 and 2008.

Travel Party	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Couple	<b>44.5</b>	40.4	<b>50.5</b>	37.4
Alone	<b>23.7</b>	15.3	<b>15.9</b>	14.8
With friends	7.4	<b>16.5</b>	11.6	<b>18.4</b>
Family with children	<b>13.8</b>	10.0	<b>12.5</b>	11.0
With relatives	<b>8.1</b>	7.8	<b>7.4</b>	6.6
Tour group	1.6	<b>9.9</b>	1.6	<b>11.2</b>
Club	<b>0.9</b>	0.1	0.5	<b>0.6</b>

### *First visit and length of stay*

Figure 5 illustrates that overall, 65.9% (67.3% in 2007) of respondents were first-time visitors to North Queensland. This figure fluctuated throughout the year, with drops in Quarters 3 (Jul-Sep; 61.5%) and 4 (Oct-Dec; 53.3%).



**Figure 5:** Percentage of respondents on their first visit to North Queensland (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

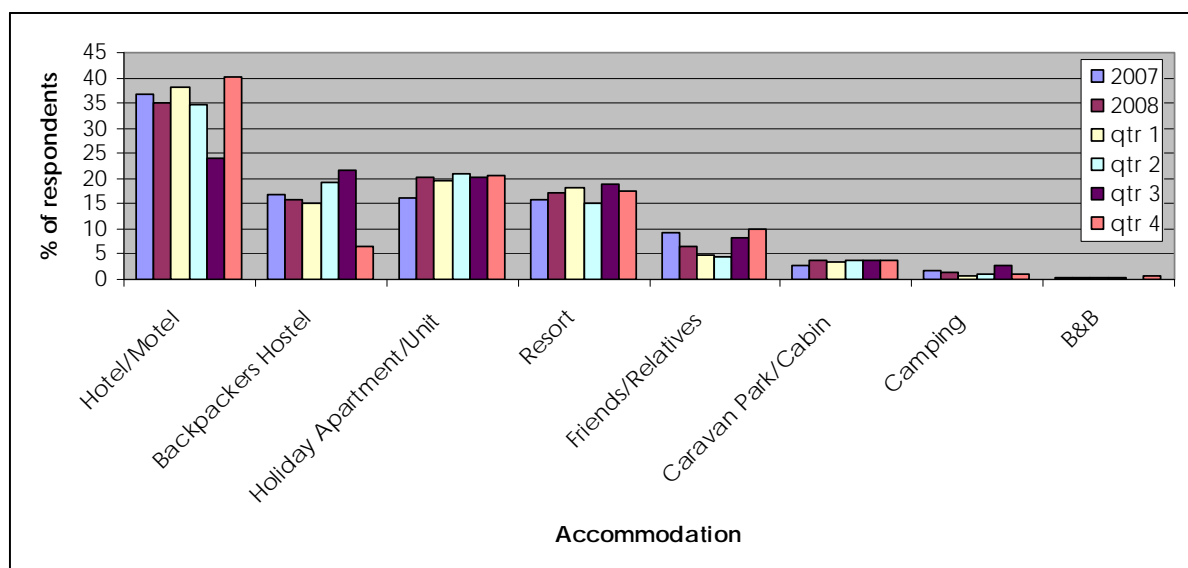
For the remaining 34.1% (32.7% in 2007) of respondents who had visited North Queensland previously, 63.16% (52.8% in 2007) had visited the region up to three times previously.

Over the survey period, the average length of stay was 7.02 nights (8.10 in 2007). In Quarter 1 (Jan-Mar) this decreased to 6.01 nights, and increased in Quarter 2 (Apr-Jun), 3 (Jul-Sep) and 4 (Oct-Dec) to 7.26, 7.92 and 7.26 nights respectively. For domestic visitors the average length of stay was 7.20 nights and slightly less for international visitors with the average being 7.00 nights.

### Accommodation

Patterns of accommodation also varied between domestic and international visitors although the overall pattern remained relatively consistent across the quarters. As Figure 6 illustrates, hotels/motels were the most popular form of accommodation (34.9%; 36.7% in 2007), peaking in Quarter 4 (Oct-Dec; 40.2%), during the Christmas and Australian school holiday periods.

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 in both 2007 and 2008; whereas domestic visitors preferred holiday apartments/units, resorts or staying with friends or relatives in both 2007 and 2008.



**Figure 6:** Chosen accommodation type of visitors surveyed (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

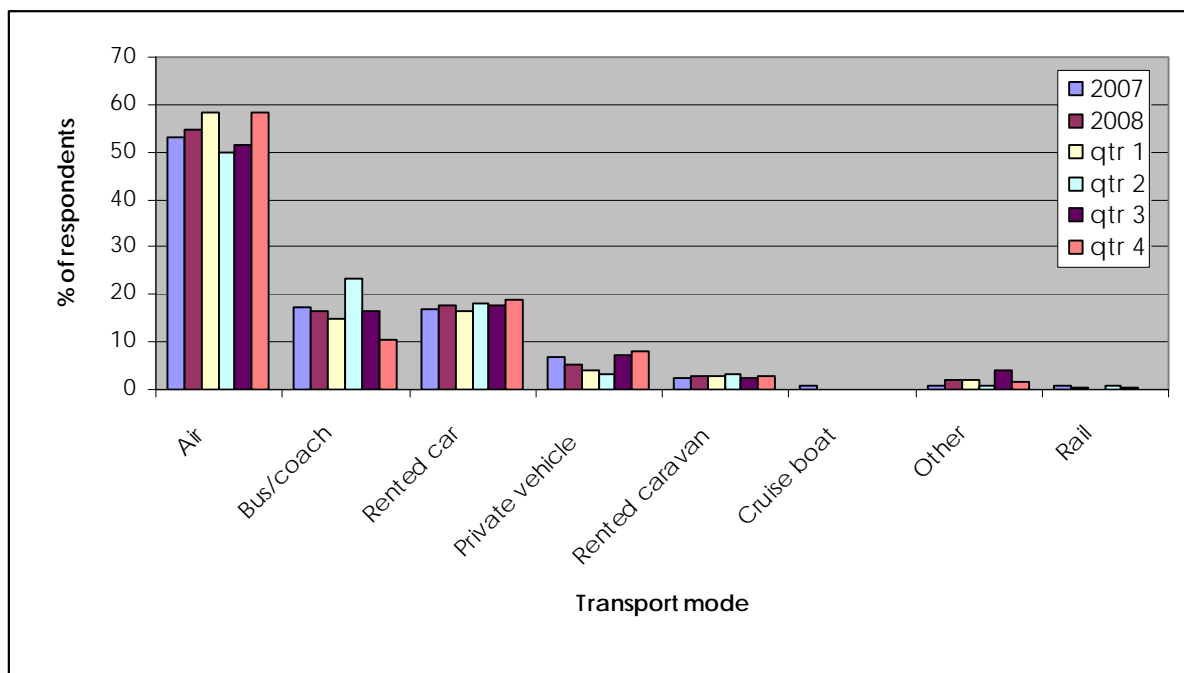
**Table 4:** Comparison of accommodation types chosen by surveyed domestic and international visitors in 2007 and 2008.

Accommodation type	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Hotel/Motel	24.3	<b>44.8</b>	26.7	<b>39.5</b>
Backpackers' Hostel	4.3	<b>25.1</b>	2.3	<b>24.4</b>
Holiday Apartment/Unit	<b>23.3</b>	11.6	<b>27.7</b>	15.9
Resort	<b>25.2</b>	9.7	<b>26.9</b>	11.2
Friends/Relatives	<b>18.4</b>	3.5	<b>11.6</b>	3.2
Caravan Park/Cabin	<b>3.0</b>	2.7	3.2	<b>4.1</b>
Camping	1.1	<b>2.0</b>	1.2	<b>1.5</b>
Bed 'n' Breakfast	0.4	<b>0.6</b>	<b>0.4</b>	0.2

### Transport

It is clear from Figure 7 that the dominant mode of transport for respondents was air transport (54.6%; 53.3% in 2007), but given that surveys were conducted at the Cairns Airport this was unsurprising. Other modes of transport used while visiting the region included buses/coaches (16.5%; 17.2% in 2007) and rental cars (17.8%; 17.0% in 2007).

In comparing international and domestic respondents, Table 5 reveals that rental cars and private vehicles were the preferred option for domestic visitors in both 2007 and 2008. For international visitors, buses/coaches and rented caravans were the preferred modes of travelling in and around the region in both 2007 and 2008.



**Figure 7:** Surveyed visitors' chosen mode of transport (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

**Table 5:** Comparison of surveyed domestic and international respondents' chosen modes of transport in 2007 and 2008.

Mode of transport	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Air	52.5	<b>54.0</b>	53.2	<b>54.8</b>
Bus/Coach	6.9	<b>24.2</b>	9.9	<b>20.9</b>
Rented car	<b>23.8</b>	12.4	<b>24.9</b>	13.4
Private vehicle	<b>12.5</b>	2.9	<b>7.4</b>	4.0
Rented campervan/caravan	0.7	<b>3.8</b>	1.1	<b>4.3</b>
Cruise boat	<b>1.0</b>	<b>1.0</b>	<b>0.5</b>	<b>0.5</b>
Other	<b>1.2</b>	0.9	<b>2.6</b>	1.6
Rail	<b>1.4</b>	0.8	0.4	<b>0.5</b>

### *Previous holidays and alternative destinations*

Table 6 lists the locations of the most popular holidays taken by respondents on their last holiday prior to visiting North Queensland. Comparisons are then made between these most popular destinations from the 2007 and 2008 annual samples.

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 in both 2007 and 2008 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 2007 and 2008 overall samples, and 2008 domestic and international samples).

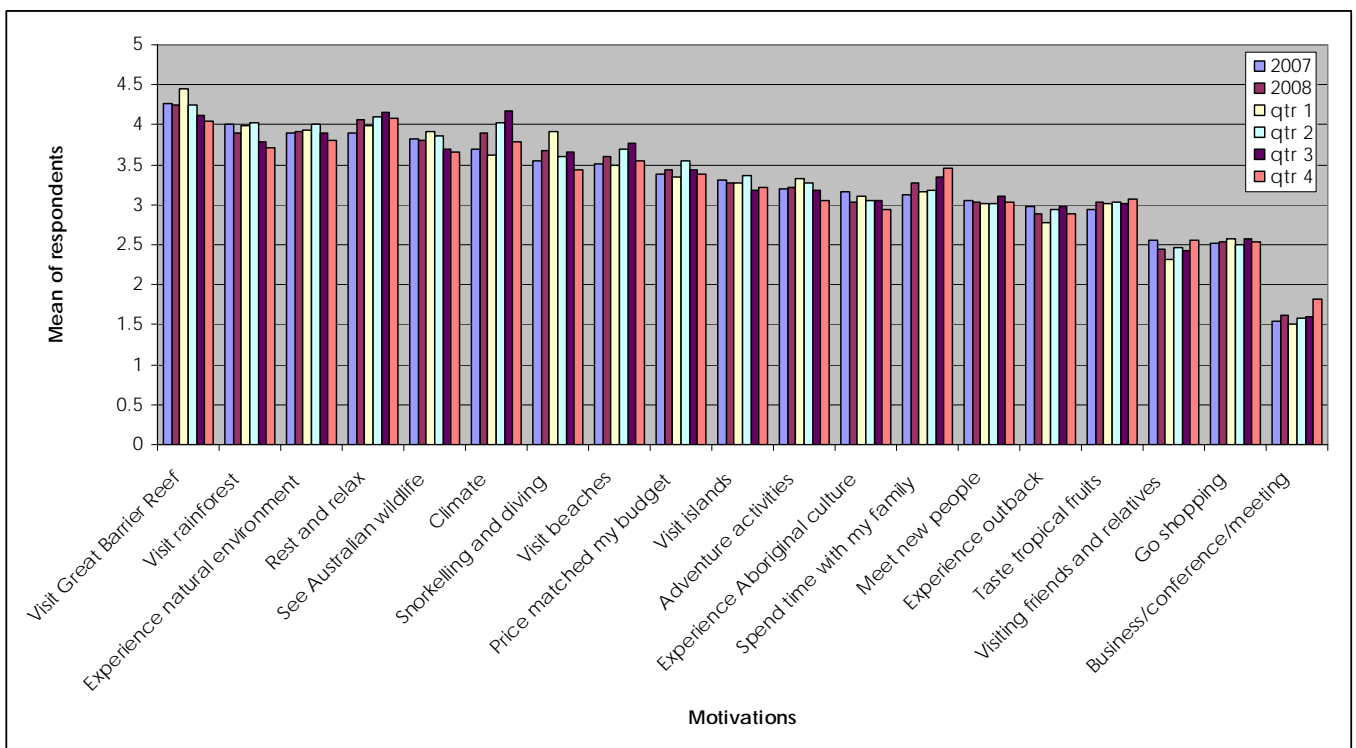
Destinations	2007 overall sample (%)	2008 overall sample (%)	2008 domestic visitors (%)	2008 international visitors (%)
United States of America	5.1	4.5		
New Zealand	4.1	4.9	4.7	4.8
Spain	3.6	3.1		
Cairns	3.0	1.8	2.8	1.1
France	2.7	2.3	0.5	3.4
Gold Coast	2.6	2.1	4.0	0.8
United Kingdom	2.6	1.5		
Thailand	2.3	2.9		
Italy	2.2	1.9	1.2	2.2
Europe	2.1	2.1	2.7	1.4
Sydney	2.0	2.7		

**Table 7:** Alternative destinations considered by surveyed visitors (as percentages of annual 2007 and 2008 samples).

Destinations	2007 overall sample (%)	2008 overall sample (%)
New Zealand	4.9	12.9
Sydney	4.0	10.7
Melbourne	2.6	7.3
Thailand	2.2	5.4
Fiji	2.1	8.2
Brisbane	2.0	6.8
Perth	2.0	4.9
Darwin	1.6	3.9
USA	1.6	4.7
Gold Coast	1.5	5.1
Tasmania	1.5	4.1
Uluru	1.5	1.0

### 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 relax, tasting tropical fruits and climate. From Figure 8, it is clear that visiting the Great Barrier Reef (mean = 4.24; 4.26 in 2008) and the rainforest (mean = 3.90; 4.0 in 2007) were among the most important motivations for visiting North Queensland. Interestingly, these figures increased during the wet season and beginning of the dry season (Quarters 1, Jan-Mar; and 2, April-June), which parallels the region's low tourist season and start of the high 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 = 3.92; 3.90 in 2007) or wildlife (mean = 3.80; 3.82 in 2007) and relaxation (mean = 4.07; 3.89 in 2007).



**Figure 8:** Surveyed visitors' motivations for visiting North Queensland (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

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 Tropical North Queensland.

**Table 8:** Comparison of surveyed domestic and international visitors' motivations for visiting North Queensland 2007 and 2008.

Motivations	2007 sample		2008 sample	
	Domestic (mean)	International (mean)	Domestic (mean)	International (mean)
Visit Great Barrier Reef	3.70	<b>4.62</b>	3.75	<b>4.54</b>
Visit rainforests	3.76	<b>4.16</b>	3.72	<b>4.03</b>
Experience natural environment	3.75	<b>4.00</b>	3.82	<b>4.00</b>
Rest and relaxation	<b>4.17</b>	3.17	<b>4.34</b>	3.90
See Australian wildlife	3.27	<b>4.17</b>	3.22	<b>4.16</b>
Climate	<b>3.76</b>	3.66	<b>4.00</b>	3.81
Snorkelling and diving	3.15	<b>3.81</b>	3.27	<b>3.91</b>
Visit beaches	3.47	<b>3.53</b>	3.50	<b>3.68</b>
Price matched my budget	<b>3.46</b>	3.34	<b>3.48</b>	3.38
Visit Islands	3.21	<b>3.36</b>	3.11	<b>3.37</b>
Adventure activities	2.95	<b>3.34</b>	2.99	<b>3.38</b>
Experience Aboriginal culture	2.74	<b>3.43</b>	2.59	<b>3.32</b>
Spend time with my family	<b>3.57</b>	2.86	<b>3.44</b>	3.14
Meet new people	2.84	<b>3.18</b>	2.70	<b>3.25</b>
Experience outback	2.58	<b>3.24</b>	2.54	<b>3.10</b>
Taste tropical fruits	<b>3.04</b>	2.87	2.88	<b>3.12</b>
Visiting friends and relatives	<b>2.84</b>	2.38	<b>2.54</b>	2.38
Go shopping	<b>2.57</b>	2.48	2.51	<b>2.55</b>
Business/conference/meeting	<b>1.79</b>	1.37	<b>1.73</b>	1.53
Walk in the rainforest	Not asked	Not asked	3.57	<b>3.72</b>
Visit a World Heritage Area	Not asked	Not asked	3.43	<b>3.68</b>

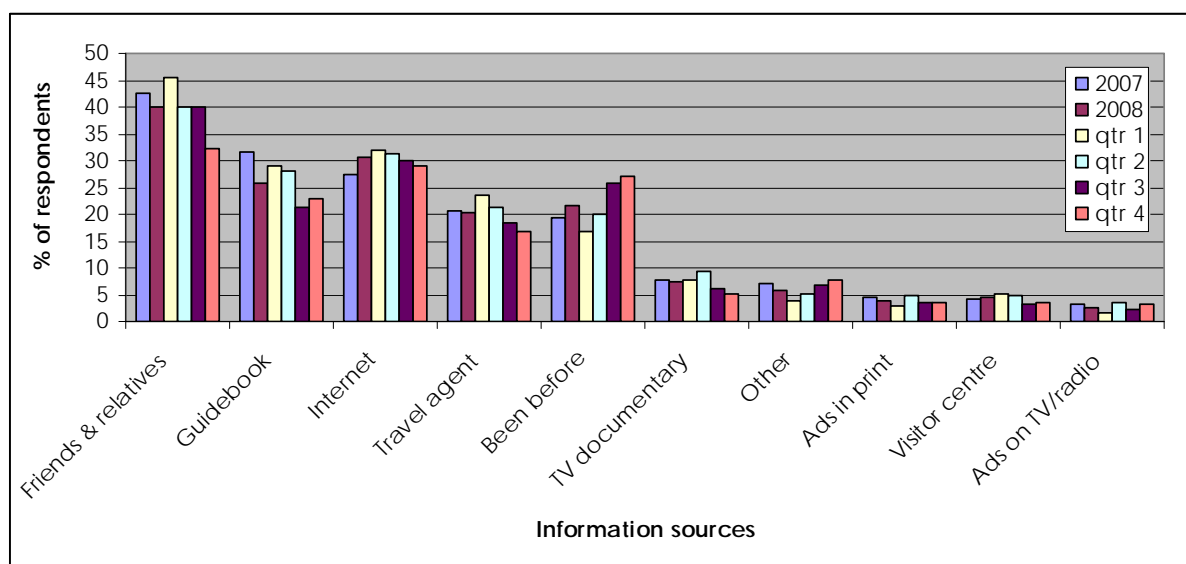
Table 9 illustrates the total rank for each motivation from the 2008 sample, followed by the overall rank by domestic and international visitors.

**Table 9:** The rank for each travel motivation by overall sample, and by domestic and international visitors.

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

### Information sources

The most popular source of information on Tropical North Queensland was friends and relatives (39.9%; 42.7% in 2007). Figure 9 illustrates that friends and relatives were a particularly popular source of information during Quarter 1 (Jan-Mar; 45.6%).



**Figure 9:** Information sources used by surveyed visitors (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

Table 10 highlights some notable differences in the information sources used by domestic and international visitors. For example, domestic visitors in both 2007 and 2008 relied more on previous visits to the region for information, as well as ads in print, and on TV or radio.

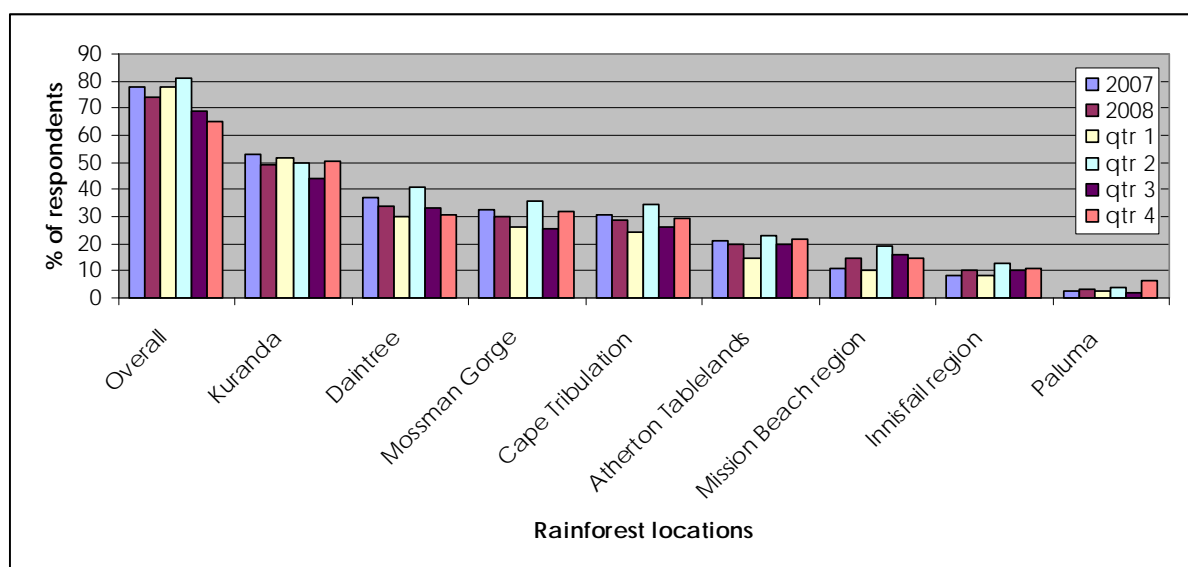
**Table 10:** Comparison of surveyed domestic and international visitors' information sources in 2007 and 2008.

Information sources	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Friends and relatives	40.7	<b>43.9</b>	37.8	<b>40.6</b>
Guidebook	12.8	<b>44.3</b>	12.5	<b>34.5</b>
Internet	22.2	<b>31.2</b>	28.0	<b>32.2</b>
Travel agent	10.3	<b>27.3</b>	12.2	<b>25.4</b>
Have been before	<b>36.2</b>	7.8	<b>38.2</b>	11.4
TV documentary	6.6	<b>8.7</b>	6.4	<b>8.0</b>
Other	<b>9.5</b>	5.8	<b>7.1</b>	4.9
Ads in print	<b>6.6</b>	3.2	<b>5.9</b>	2.5
Visitor centre	2.9	<b>5.2</b>	3.0	<b>5.2</b>
Ads on television/radio	<b>5.0</b>	2.1	<b>4.3</b>	1.5

### 3.3 Surveyed visitors' experiences in and satisfaction with Tropical North Queensland

#### Visits to rainforests of the Wet Tropics

Overall, 74.0% (77.6% in 2007) 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 peaking in Quarters 1 (Jan-Mar; 77.6%) and 2 (Apr-Jun; 81.0%). As Figure 10 shows, the key hotspots for experiencing the rainforest included Kuranda (49.3%; 53.0% in 2007), Daintree (34.0%; 37.3% in 2007) and Mossman Gorge (30.1%; 32.5% in 2007). There was little variation in visitation rates across the seasons at the visited rainforest locations.



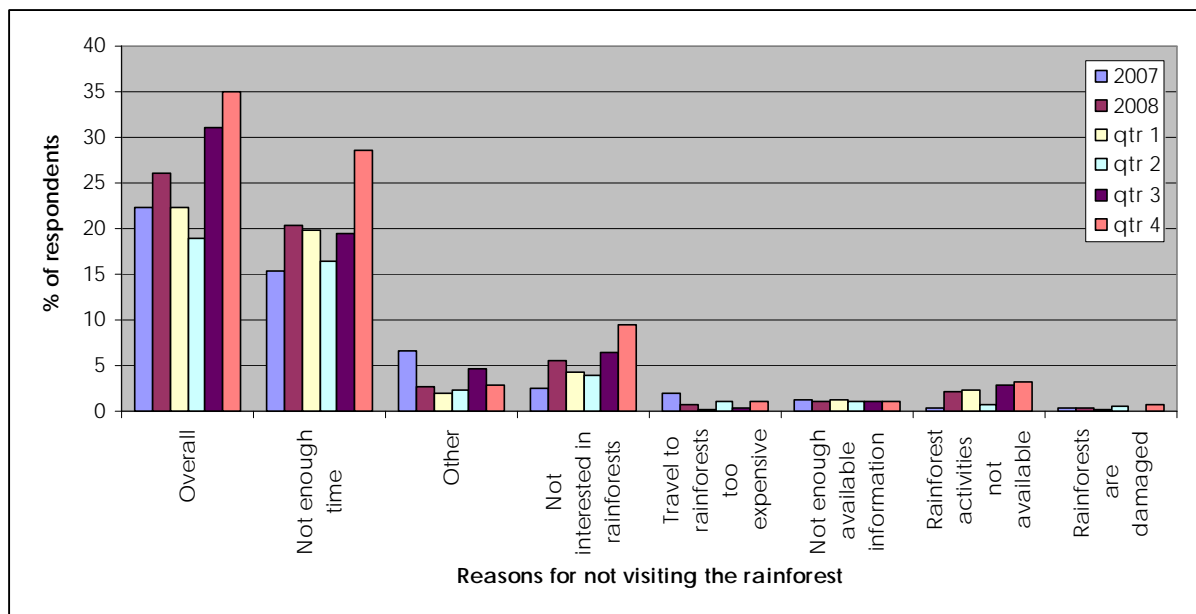
**Figure 10:** Rainforest locations visited by surveyed tourists (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

Table 11 provides a comparison between domestic and international visitors of rainforest visitation patterns. While international visitors were more likely overall to visit the Wet Tropics rainforests in Kuranda, Cape Tribulation, the Mission Beach area, and Paluma in 2007, domestic visitors were more likely to visit all rainforest sites in 2008.

**Table 11:** Comparison of rainforest locations visited by surveyed domestic and international visitors in 2007 and 2008.

Rainforest locations	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Overall	68.8	<b>83.4</b>	68.7	<b>77.8</b>
Kuranda	47.1	<b>57.0</b>	<b>50.8</b>	48.9
Daintree	<b>37.2</b>	<b>37.2</b>	<b>39.1</b>	31.2
Mossman Gorge	<b>34.1</b>	31.3	<b>36.6</b>	26.2
Cape Tribulation	27.6	<b>32.7</b>	<b>29.3</b>	28.9
Atherton Tablelands	<b>27.8</b>	16.5	<b>27.9</b>	14.8
Mission Beach region	8.8	<b>11.8</b>	<b>16.5</b>	14.0
Innisfail region	<b>10.7</b>	6.6	<b>16.7</b>	6.4
Paluma	1.4	<b>3.1</b>	<b>5.3</b>	2.3
Lakes area	Not asked	Not asked	<b>11.4</b>	8.0
Waterfalls circuit	Not asked	Not asked	<b>15.3</b>	9.6
Misty Mountains	Not asked	Not asked	<b>4.3</b>	2.9

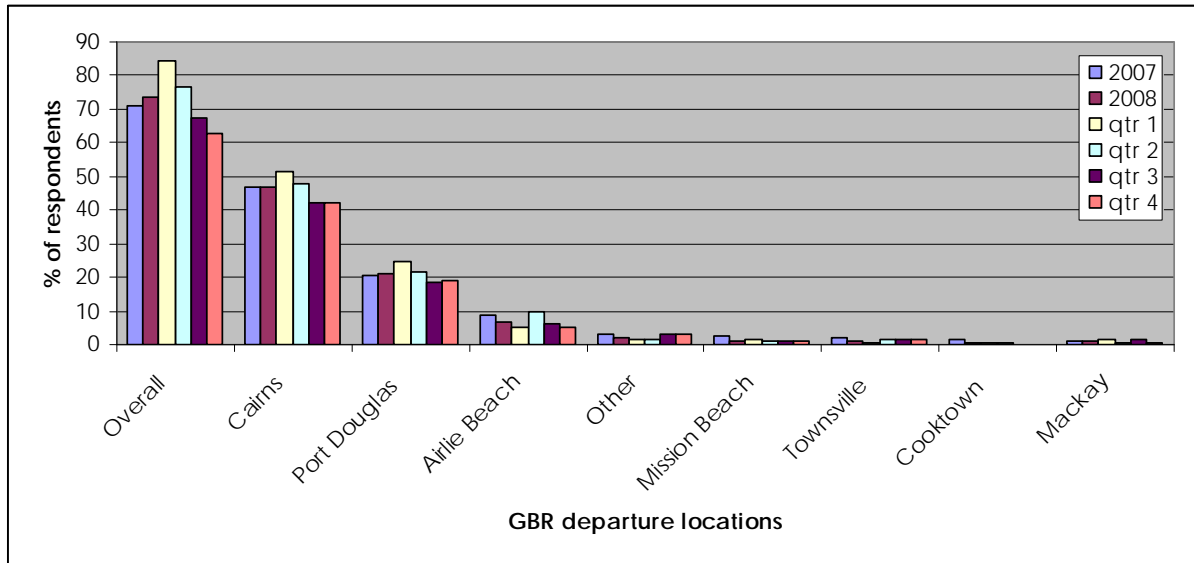
According to Figure 11, for the remaining 26% (22.4% in 2007) of respondents, the key reason for not visiting the Wet Tropics rainforest was not enough time (20.4% of total visitors; 15.4% in 2007), followed by not interested in the rainforest (5.5%; 2.5% in 2007).



**Figure 11:** Visitors' reasons for not visiting the rainforests of North Queensland (as percentages of 2007 and 2008 annual samples, and 2008 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, 73.7% (70.9% in 2007) of respondents visited the Great Barrier Reef on their trip to Tropical North Queensland with the majority of visitors departing from Cairns (46.6%; also 46.6% in 2007) and to a lesser extent Port Douglas (21.2%; 20.6% in 2007). In terms of seasonality, there were some slight increases in overall visitation to the reef in Quarter 1 (Jan-Mar; 84.2%), which is somewhat surprising given that this is the low season and consequently poor weather conditions.



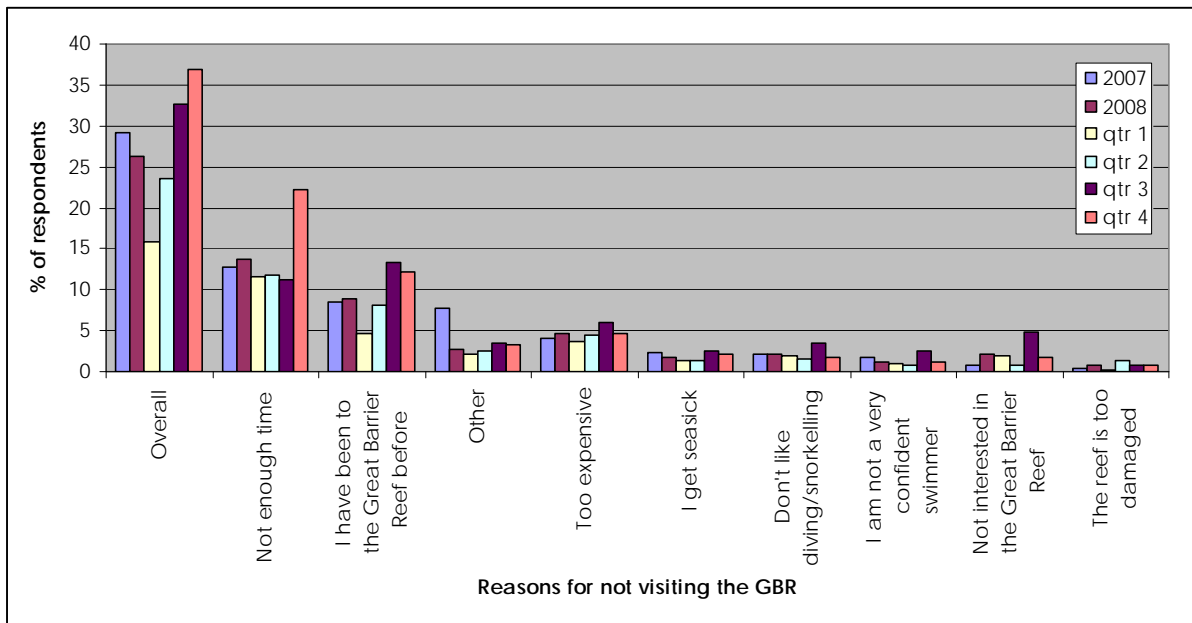
**Figure 12:** Departure locations for the Great Barrier Reef as used by surveyed visitors (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

In general, international visitors were much more likely to visit the Great Barrier Reef in both 2007 and 2008 – at a rate almost double that of domestic visitors (see Table 12). Furthermore, as Table 12 illustrates, international visitors were more likely in both 2007 and 2008 than domestic visitors to depart from places including Cairns (at a rate almost double), Port Douglas, Airlie Beach and Townsville.

**Table 12:** Comparison of departure locations for the Great Barrier Reef as used by surveyed domestic and international visitors in 2007 and 2008.

Departure location	2007 sample		2008 sample	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Overall	44.5	<b>88.5</b>	52.7	<b>87.2</b>
Cairns	27.6	<b>59.2</b>	30.7	<b>56.5</b>
Port Douglas	15.5	<b>24.1</b>	19.1	<b>22.8</b>
Airlie Beach	1.2	<b>13.7</b>	3.5	<b>8.8</b>
Other	2.9	<b>3.4</b>	<b>3.3</b>	1.7
Mission Beach	<b>2.6</b>	2.5	<b>1.5</b>	0.9
Townsville	1.0	<b>2.5</b>	<b>1.3</b>	<b>1.3</b>
Cooktown	<b>1.7</b>	1.2	0.2	<b>0.6</b>
Mackay	0.2	<b>1.6</b>	<b>1.5</b>	0.9

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 13:** Visitors' reasons for not visiting the Great Barrier Reef (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples).

## Service quality

Visitors were asked to reflect on their satisfaction with service quality during their holiday in the region using a scale of 1 ('Very unsatisfied') to 5 ('Very satisfied'). On this scale, a mean score less than 4 indicates a general view that the item being rated has failed to reach a satisfactory standard. A score below 3 indicates dissatisfaction. Ideally, the benchmark for service quality is a mean of 4 or more which indicates that on average respondents viewed the item being assessed as satisfactory or better. Table 13 provides a summary of respondents' ranking of various service quality aspects during their stay, and provides a comparison between domestic and international visitors.

**Table 13:** Comparison of domestic and international visitors' attitudes to service quality in North Queensland in 2008.

Service quality aspects	Mean		
	Overall	Domest.	Internat.
<b>Accommodation</b> – friendly staff	4.19	4.13	4.24
Accommodation – value for money	3.92	3.93	3.92
Accommodation – service standard	3.91	3.92	3.91
<b>Tours</b> – guides were informative	4.08	3.93	4.15
Tours – value for money	3.80	3.65	3.89
Tour – service standards	3.95	3.82	4.03
Tours – were on-time	4.13	3.97	4.22
<b>Attractions</b> – value for money	3.78	3.63	3.87
<b>Restaurants</b> – staff were efficient	3.75	3.79	3.72
Restaurants – value for money	3.45	3.47	3.44
Restaurants – menu selections	3.60	3.62	3.58
<b>Shopping</b> – was good	3.44	3.42	3.45
Shopping – good variety	3.38	3.33	3.41
Shopping – closing times	3.33	3.37	3.31
<b>Public transport</b> – was accessible	3.45	3.41	3.47
Public transport – was on time	3.43	3.35	3.48
<b>Visitor information</b> – was accurate	3.89	3.82	3.92
Visitor information – was accessible	3.96	3.89	3.99
Felt <b>safe/secure</b> moving around	4.29	4.16	4.37

### ***Budget of surveyed visitors and where they travelled during their trip***

The exit survey posed a question on respondents' overall budget for their travel party for this trip (including airfares, accommodation, tours and all other expenses). The average overall budget for respondents was \$5,747 (\$3,748 in 2007). This average budgeted amount supported on average 2.73 adults and 1.03 children (1.83 adults and 0.2 children in 2007). Table 14 provides a breakdown of the overall budgets for domestic and international visitors, and visitor occupation.

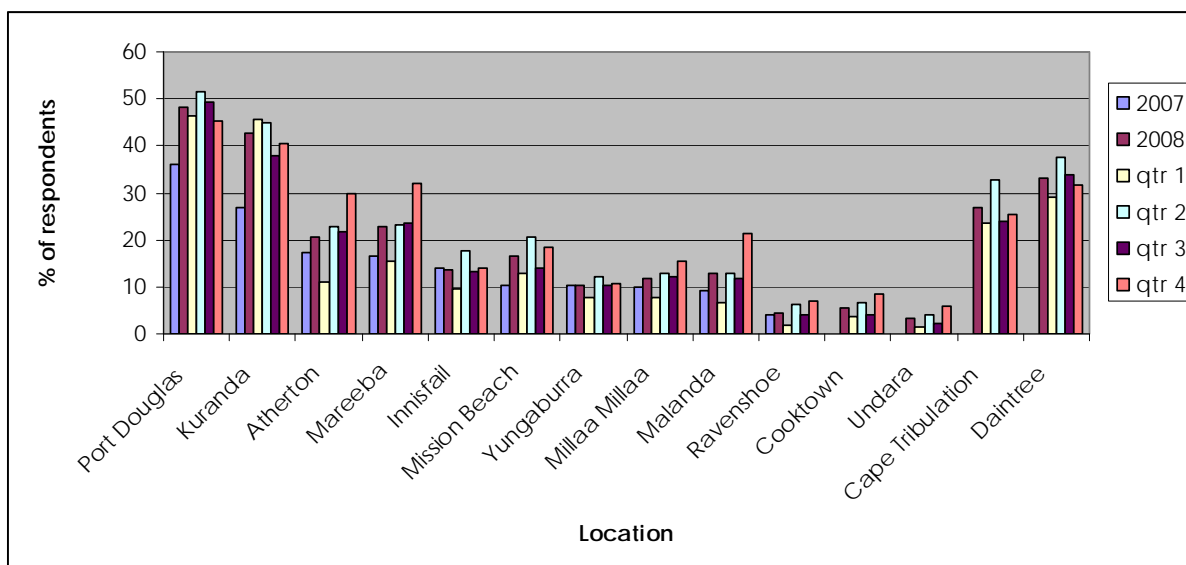
One of the final questions in the exit survey related to where visitors with access to either a rental car or a private vehicle travelled through or to during their trip in North Queensland. The most popular places included Port Douglas (48.2%; 36.0% in 2007) and Kuranda (42.8%; 26.7% in 2007). Figure 14 shows the percentage of respondents who travelled to these locations (annually and quarterly). Table 15 shows the gender of those surveyed, and the locations they travelled through or to on their trip in North Queensland.

As demonstrated 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 budget for surveyed visitors according to origin or occupation in 2008.

<b>Origin or occupation</b>	<b>Overall budget (\$AUD)</b>	<b>Adults</b>	<b>Children</b>
International	7,460	1.94	0.31
Domestic	3,246	3.89	2.21
Manual/Factory Work	3,167	1.54	0.07
Retired/Semi-retired	7,485	2.11	0.05
Self-employed	5,230	1.98	0.32
Retail	5,082	2.13	0.19
Tradesperson	6,894	1.64	0.13
Professional	5,047	5.15	3.39
Domestic duties	6,163	2.28	0.32
Other	5,187	1.67	0.13
Management	12,313	2.39	0.87
Office-Clerical	4,287	1.89	0.10
Student	3,368	1.57	0.42
Public Service	4,217	1.71	0.06
Service Industry	3,814	1.79	0.10



**Figure 14:** Locations travelled through or to during visitors' trips to North Queensland (as percentages of 2007 and 2008 annual samples, and 2008 quarterly samples). In 2007 visitors were not asked if they had visited Cooktown, Undara, Cape Tribulation or Daintree.

**Table 15:** Comparison of male and female visitors' chosen locations to travel through or to in North Queensland in 2008.

Locations	Male visitors (%)	Female visitors (%)
Port Douglas	46.8	49.0
Kuranda	43.6	41.8
Atherton	19.0	21.8
Mareeba	22.9	22.7
Innisfail	13.3	13.9
Mission Beach	16.3	16.5
Yungaburra	8.8	11.4
Millaa Millaa	12.7	11.0
Malanda	12.3	12.9
Cooktown	6.3	4.7
Undara	3.6	2.8
Ravenshoe	5.4	3.7
Cape Tribulation	25.0	28.2
Daintree	31.5	34.1

**Table 16:** Comparison of locations travelled through or to by surveyed domestic and international visitors in 2008.

Locations	Domestic visitors (%)	International visitors (%)
Port Douglas	58.1	42.5
Kuranda	47.3	40.7
Daintree	39.2	29.6
Mareeba	32.9	16.4
Atherton	31.8	13.8
Cape Tribulation	29.0	26.1
Malanda	19.3	8.4
Innisfail	19.1	10.1
Mission Beach	18.7	15.5
Millaa Millaa	17.0	8.7
Yungaburra	14.5	7.8
Cooktown	8.1	4.3
Ravenshoe	7.4	2.8
Undara	4.2	2.7

**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	54.9	56.8	40.4	53.5	43.3	40.4	48.5	45.1	26.9	46.8	50.0
Kuranda	39.3	50.3	28.6	51.4	44.8	49.5	47.1	39.7	51.9	51.1	33.3
Atherton	20.9	28.4	10.3	26.8	20.1	20.2	20.6	19.4	15.4	27.7	12.5
Mareeba	25.9	31.1	9.4	28.9	23.9	26.3	17.6	26.4	13.5	23.4	16.7
Innisfail	13.6	21.9	9.4	13.4	14.2	10.1	10.3	9.7	13.5	19.1	4.2
Mission Beach	16.7	18.6	18.8	14.8	13.4	12.1	22.1	15.3	15.4	14.9	8.3
Yungaburra	10.9	17.5	3.3	14.1	9.0	10.1	16.2	12.5	5.8	10.6	0.0
Millaa Millaa	13.1	17.5	4.7	15.5	9.7	11.1	14.7	13.9	13.5	10.6	4.2
Malanda	14.2	16.9	3.8	19.0	14.2	12.1	14.7	8.3	13.5	12.8	4.2
Ravenshoe	4.2	9.3	0.9	7.0	5.2	2.0	5.9	1.4	1.9	8.5	0.0
Cooktown	5.0	9.8	3.3	7.8	6.0	1.0	8.8	4.2	5.8	6.4	0.0
Undara	3.9	4.9	1.9	2.8	3.0	1.0	4.4	1.4	1.9	6.4	0.0
Cape Tribulation	31.2	31.1	28.2	28.2	23.9	17.2	25.0	26.4	15.4	25.5	16.7
Daintree	39.6	37.7	31.0	39.4	29.9	22.2	29.4	32.4	19.2	25.5	33.3

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

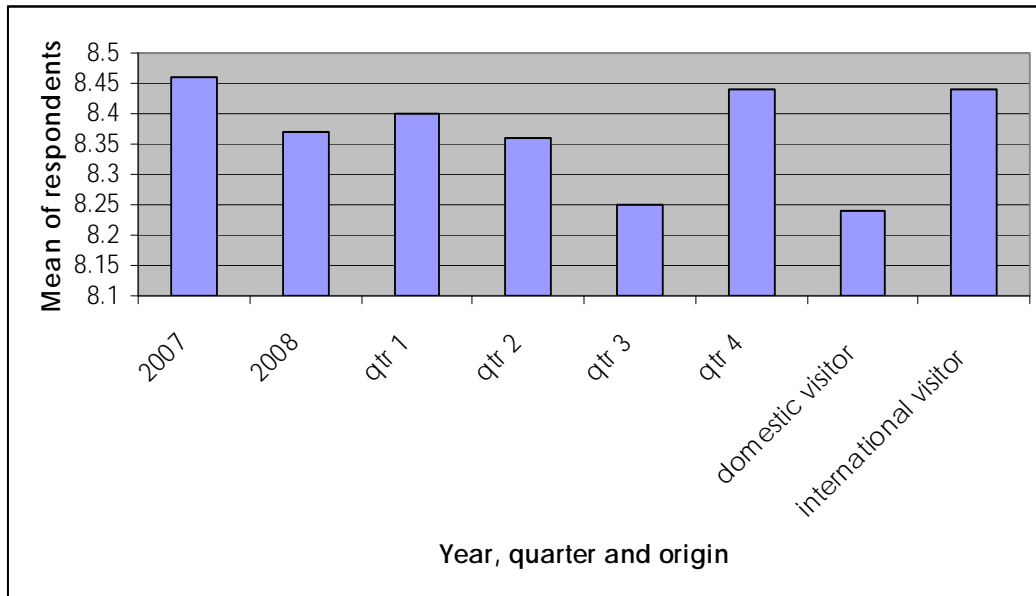
Locations	Under 20 yrs (%)	20-29 yrs (%)	30-39 yrs (%)	40-49 yrs (%)	50-59 yrs (%)	60-65 yrs (%)	Over 65 yrs (%)
Port Douglas	47.4	40.3	51.4	47.1	52.3	55.0	59.6
Kuranda	36.8	32.5	39.0	51.6	54.3	43.3	50.0
Atherton	14.0	12.4	20.6	24.7	32.7	19.2	23.1
Mareeba	16.7	13.1	22.9	30.9	31.2	25.0	28.8
Innisfail	10.5	9.3	13.0	12.1	20.7	17.5	15.4
Mission Beach	21.1	19.3	14.3	10.8	19.9	13.3	13.5
Yungaburra	7.0	5.0	10.3	11.2	17.3	12.5	11.5
Millaa Millaa	7.0	7.9	12.1	14.8	16.5	12.5	12.5
Malanda	7.9	6.5	12.6	21.1	16.5	14.2	14.4
Ravenshoe	1.8	2.6	4.9	4.9	6.8	2.5	11.5
Cooktown	7.9	1.9	4.0	4.0	9.4	10.8	10.7
Undara	3.5	1.2	2.2	2.7	6.4	4.2	6.7
Cape Tribulation	32.5	26.7	29.6	23.3	24.4	27.5	28.8
Daintree	34.2	28.6	34.2	35.9	33.1	32.5	41.3

**Table 19:** Comparison of locations travelled through or to by visitors, and their source(s) of information about North Queensland destinations.

Locations	Friends and relatives (%)	Guidebook (%)	Internet (%)	Travel agent (%)	Been before (%)	TV documentary (%)	Other (%)	Ads in print (%)	Visitor centre (%)	Ads on TV/radio (%)
Port Douglas	53.0	47.3	53.9	47.3	52.7	46.3	40.2	60.7	50.8	52.6
Kuranda	43.1	40.0	46.6	46.2	39.2	45.0	42.7	49.1	49.2	51.3
Atherton	20.0	20.3	24.0	16.9	28.5	21.3	13.4	37.5	35.4	31.6
Mareeba	22.4	20.3	26.9	17.3	30.4	25.0	18.3	35.7	38.5	28.9
Innisfail	13.7	15.6	12.8	12.0	18.5	17.6	8.5	17.9	30.8	26.3
Mission Beach	16.3	24.2	16.7	17.3	19.1	16.7	11.0	25.0	30.8	13.2
Yungaburra	10.4	12.5	13.7	9.3	13.5	13.9	3.7	16.1	18.5	18.4
Millaa Millaa	11.9	12.8	14.5	10.0	15.7	13.0	7.3	14.3	20.0	10.5
Malanda	12.2	13.3	15.6	10.6	15.0	16.7	11.0	16.1	20.0	10.5
Ravenshoe	4.2	5.7	4.4	4.3	8.2	5.6	3.7	10.7	10.8	5.3
Cooktown	5.9	4.4	5.1	6.3	6.3	5.6	4.9	8.9	9.2	2.6
Undara	2.9	3.9	3.5	4.7	5.0	4.6	2.4	7.1	4.6	2.6
Cape Tribulation	30.0	33.1	33.3	30.9	29.2	27.8	13.4	35.7	43.1	18.4
Daintree	37.0	34.7	39.5	33.7	36.1	35.2	19.5	44.6	43.1	34.2

**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 2008 was 8.37 (8.46 in 2007), as shown in Figure 15. This score drops slightly in Quarter 3 (Jul-Sep) to 8.25 (out of 10). Furthermore, in comparing domestic and international surveyed visitors, domestic visitors to the region provided a lower overall annual score (8.24; 8.34 in 2007) than international visitors (8.44; 8.55 in 2007).



**Figure 15:** Overall surveyed visitors' satisfaction with their trip to North Queensland (as means of 2007 and 2008 annual, 2008 quarterly, domestic visitor and international visitor samples).

## 4. Publication List – Year Two

### *Quarterly 'Tourism Barometers'*

2008 Rainforest Tourism Barometers – Quarters 1, 2, 3 and 4

Available for download: [http://www.rrrc.org.au/publications/tourism\\_barometers.html](http://www.rrrc.org.au/publications/tourism_barometers.html)

### *Survey Fact Sheets*

Available for download: [http://www.rrrc.org.au/publications/tnq\\_factsheets.html](http://www.rrrc.org.au/publications/tnq_factsheets.html)

- [Visitors who visited the Great Barrier Reef](#) (Jan-Dec 2007)
- [Visitors who visited the Wet Tropics rainforests](#) (Jan-Dec 2007)
- [Visitors who stayed in a hotel / motel](#) (Jan-Dec 2007)
- [Visitors who stayed in a holiday apartment / unit](#) (Jan-Dec 2007)
- [Visitors who stayed in a backpacker hostel](#) (Jan-Dec 2007)
- [Visitors who traveled to Atherton](#) (Jan-Dec 2007)
- [Visitors who traveled to Mission Beach](#) (Jan-Dec 2007)
- [Visitors who traveled to Port Douglas](#) (Jan-Dec 2007)
- [Solo female visitors](#) (Jan-Sep 2008)
- [Service quality](#) (Jan-Sep 2008)
- [Repeat visitors](#) (Jan-Sep 2008)

### *Peer-Reviewed Articles*

McNamara, K.E. and Prideaux, B. (Accepted) A typology of solo independent women travellers. *International Journal of Tourism Research*.

McNamara, K.E. and Prideaux, B. (In review) It's where the reef meets the rainforest, but is there more to the Tropical North Queensland destination? *Journal of Ecotourism*.

McNamara, K.E. and Prideaux, B. (2009) *Exploring the motivations and behaviours of solo women travelers in Tropical North Queensland*. Council for Australian University Tourism and Hospitality Education (CAUTHE) 2009 Conference, 10-13 February, Fremantle WA.

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## Further Information

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