

Airport Exit Survey 2009 and Final Report: January 2007 – December 2009

**2007–2009 Patterns of Reef and Rainforest Tourism
in North Queensland from Exit Surveys Conducted
at Cairns Domestic Airport**

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Executive Summary

The specific aim of this research was to develop a comprehensive data set, on a quarterly basis, that facilitates investigation of a range of issues, including demographic profiles, motivations, activities, segmentation and seasonality of visitors in the Tropical North Queensland Region (TNQ). Data has been released on a quarterly basis as a barometer and on an annual basis as an Annual Report (<http://www.rrrc.org.au>) and as occasional fact sheets. In this final annual report for the MTSRF program, data is provided on an annual, as well as a whole of project, time scale. Comparisons of annual data are provided for 2007, 2008, 2009 and for the overall 2007-2009 survey results. Results are based on 4672 completed surveys collected from tourists in the departure lounge of the Cairns Domestic Airport.

The first three years of data has been aggregated to create a three year average against which future changes in visitor characteristics may be measured.

The data was collected only at the airport and, as a consequence, does not report on visitors who used other transport modes to travel to and from the destination.

The research was not designed to provide information on the overall numbers of visitors who visit the region or how these figures vary on a yearly basis. Readers are referred to Tourism Research Australia which publishes high quality data on visitor numbers.

Findings for the 2007–2009 research period

Visitor characteristics

- After domestic visitors, the second largest group of respondents was from the United Kingdom (UK) and Ireland, followed by North America and Europe.
- By occupation the largest group of respondents was professionals, who comprised 23.5% of all respondents, followed by students (16.8%). A further 14.3% of respondents in the 2007-2009 survey period were retirees/semi-retirees.
- Combined, the 20-29 and 30-39 year age groups make up over 43.8% of the 2007-2009 survey period. The 60-65 and the 65+ groups together totalled 19.5% over the same period.
- The largest travel party sector was couples, who accounted for 42.6% of the 2007-2009 survey period; a rate which remained constant for each year of this survey. The next most significant travel party groups were respondents travelling alone (16.2%) and with friends (15.5%).
- Two-thirds of respondents (66.6%) were first-time visitors to North Queensland. Of the remaining 33.4% of respondents who had visited North Queensland on a previous occasion, 62.7% had visited the region up to three times previously.
- Patterns of accommodation showed considerable variability over the period of the survey. Hotels/motels were the most popular form of accommodation (31.2%), followed by holiday apartments, backpacker hostels and resorts. One form of accommodation that shows a consistent pattern of growth is the caravan park/cabin sector.

Motivations for visiting the region

There were considerable differences in the ranking given to motivations by domestic and international visitors. The top seven motives for visiting the region during the 2007-2009 survey period for domestic visitors were rest and relax (1), climate (2), experience the natural environment (3), visit the rainforest (4), visit the Great Barrier Reef (5), visit the beaches (6) and in equal seventh place, price matched my budget and to visit friends and relatives. For international visitors the top seven motives were: to visit the rainforest (1), see Australian

wildlife (2), visit the Great Barrier Reef (3), experience the natural environment (4), snorkelling and diving (5), rest and relax (6) and climate (7). Analysis of the remaining motives indicates that there is relatively strong interest by international visitors in indigenous culture ($m=3.4$) and adventure activities ($m=3.39$).

Activities

During the 2007-2009 survey period, 76.1% of respondents reported visiting the Wet Tropics World Heritage rainforests. The key hotspots for experiencing the rainforest included Kuranda (51.3% in the 2007-2009 survey period), Daintree (35.7% in the 2007-2009 survey period) and Mossman Gorge (32.5% in the 2007-2009 survey period).

The reasons given by respondents for not visiting the rainforest (23.9%) were not enough time followed by not interested and that activities they wished to participate in were not available.

For the survey period 74.2% (79.0% in 2009) of respondents visited the Great Barrier Reef with the majority of respondents departing from Cairns.

The key reasons given by respondents for not visiting the Great Barrier Reef were lack of time (13.5%) and because they had been before (8.5%).

Respondents' opinions on the region's service quality standards have been relatively constant over 2008 and 2009. A number of results are positive, including accommodation, tours and, particularly, respondents' perceptions of safety and security while in the destination. A number of responses are, however, of concern, including public transport, restaurants and shopping. The relatively low score for public transport is of particular concern given that the majority of visitors rely on either public transport or tour coaches to visit attractions in the region.

Satisfaction

The overall annual mean for the 2007-2009 survey period was 8.45. Domestic respondents reported a lower level of satisfaction during the 2007-2009 survey period than their international counterparts ($m=8.51$).

1. Introduction

A recent report (Cummings, 2009) highlighted the significant role that the tourism industry plays in the regional economy of Tropical North Queensland. According to the report, the tourism sector generates approximately 25% of jobs in the Cairns region, making the region the most tourism dependent economy in Australia. However our level of knowledge about tourists who visit the region each year is limited. To assist fill this serious knowledge gap the Marine and Tropical Sciences Research Facility (MTSRF) funded a project that, along with other objectives, was designed to develop a greater understanding of the reasons why tourists visit the region and what activities they undertake. While extensive reporting of tourism statistics is undertaken by Tourism Research Australia neither the International Visitors Survey nor the National Visitors Survey provide extensive information on the specific motives for travel to Tropical North Queensland nor give specific information on a range of visitor activities and characteristics. To address this gap, a long-term visitor monitoring system based on monthly airport surveying was developed to provide both a baseline against which to measure changes in tourist attitudes and behaviours and a monitoring system that enables changes in visitor characteristics and behaviour to be identified. This report has two purposes. Firstly it reports on 2009 data and secondly it presents data collected for the entire survey period (2007–2009).

The specific aim of the research was to develop a comprehensive data set, on a quarterly basis, that facilitates investigation of a range of issues including demographic profiles, motivations, activities, segmentation and seasonality. Data has been released on a quarterly basis as a barometer and on an annual basis as annual reports (<http://www.rrrc.org.au>) and occasional fact sheets. During the period of the project, barometers and annual reports have tracked changes in a number of reporting categories, providing users with up-to-date analysis of trends that are occurring in arrival patterns, motivations and experiences.

In this final annual report for the MTSRF program, data is provided on an annual as well as a whole-of-project time scale. Comparisons of annual data are provided for 2007, 2008, 2009 and the overall 2007–2009 survey results. Results are based on 4672 completed surveys collected from tourists in the departure lounge of the Cairns Domestic Airport.

The results in the final report are broadly grouped into the following four thematic areas:

- Socio-demographic characteristics of respondents
- Motivations and behaviours of respondents
- Experiences and satisfaction of respondents
- Case studies.

The data collected during the three year survey period is extensive and rich. The following results report on major elements of the data but the data set is able to provide more extensive information than is reported here. To demonstrate the potential for other uses of the data, the report concludes with a series of single issue reports including the couples' market, backpackers and New Zealand visitors. The potential exists for many more single issue reports of this nature.

Uses of the research

The airport survey captured a range of data from visitors departing from Cairns. This included motivations for travelling to the region and information on who visited and did not visit the region's key icons, including the Great Barrier Reef and the Wet Tropics Rainforests. It gives a broad overview of visitors that was not captured by companion surveys that investigated visitor patterns on the Great Barrier Reef (GBR) and the Wet Tropics Rainforests. Because these surveys only captured data on visitors to the specific icon, differences between the surveys can be expected.

As previously highlighted, the aim of this project was to create a comprehensive database that could be used to identify a wide range of visitor characteristics and that could be used as a baseline against which to measure annual changes in visitor characteristics. The first three years of data has been aggregated to create a three-year average against which future changes in visitor characteristics may be measured. Why three years of data? While care has been taken to ensure that sampling was robust, under or over reporting can be expected and will create annual variations in data. By taking a three-year average, these yearly variations can be smoothed and the average used as a baseline against which to measure change in the future.

However, it should also be noted that the data was collected only at the airport and, as a consequence, does not report on visitors who used other transport modes to travel to and from the destination. Companion reports profile visitor patterns in the Wet Tropics Rainforests and the Great Barrier Reef.

It should also be noted that results are reported as an aggregated destination figure and in a disaggregated form to at least domestic and international visitor level. A careful reading of the report will highlight considerable differences between the domestic and international sector and between various visitor categories within the report. This information should be of specific interest to tourism operators in the study region.

What this research does not report

The research was not designed to provide information on the overall numbers of visitors who visit the region or how these figures vary on a yearly basis. Research funded by Tourism Research Australia is able to provide high-quality data on visitor numbers and, to a limited extent, knowledge about visitor activities.

2. Methodology

The primary method used for this research was self-completed surveys administered to departing visitors at the Domestic terminal of the Cairns Airport. This site was selected because it provided a convenient place to collect exit surveys at a time when most people approached had time to complete the survey. Surveying was undertaken twice monthly by trained research assistants. Visitors were approached and asked if they wished to participate. If a positive response was received, a follow up question was asked to determine if the potential respondent was a resident of North Queensland or a visitor to the region. If the person indicated they were a local resident they were thanked for their time and the interview was terminated. A cover page with the aims of the study and instructions was provided to every respondent. The researcher remained close to the participants to clarify any questions during the completion of the questionnaire. Many respondents reported finding that the experience of completing a survey was a useful exercise that allowed them to reflect on their experiences, and contribute their opinions on aspects of their holiday.

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 of the survey instrument 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 had the capability to collect data for other projects funded by the MTSRF.

As with all surveys of this nature there is of necessity a trade-off between the needs for detailed information and the quality of the data harvested. If respondents consider that the survey is too long, the response rate will fall, as will the accuracy of responses. For this reason there were many issues that could not be included in the survey. In recognition of this limitation the survey was updated annually, new questions inserted and existing questions deleted if required.

To randomize results, the survey days were varied between weekdays and weekends. No other methods of randomization were used. This method ensured that a wide cross section of visitors was surveyed. A copy of the 2009 survey is attached as Annex 1. As a token of appreciation, respondents were given a complimentary postcard.

Information collected in the surveys included visitors' socio-demographic characteristics, travel patterns, motivations, activities, alternative destinations considered, previous reef and rainforest tourism experiences and satisfaction, measures of expectations, best and worst experiences, recommendations to others, and value for money. Responses are collected through a mix of closed ended, Likert-scale and open ended questions. Following discussions with relevant stakeholders 21 travel motives were identified. Lack of space in the survey instrument prevented an expansion of the number of possible motives beyond this number. The results from the surveys were checked for outliers, scanned, manually entered and coded into SPSS (*Statistical Package for the Social Sciences*, version 18.0).

2.1 Limitations

The collection method adopted has several limitations. Firstly, only visitors exiting the region from the airport were surveyed because of cost and the difficulty in gaining access to those departing by car, rail and coach. Other datasets indicate that the overall numbers using modes other than air is quite small and so the inability to survey these visitors is not seen as a major limitation. However, it may mean there are differences between the results reported here and in research reported by Tourism Research Australia.

A second limitation is that visitors who were not proficient in English were not surveyed. Given the number of visitors from Japan and China this is a significant research gap that has been partly addressed in specific surveys of Japanese and Chinese visitors which are reported separately.

It should also be noted that the data collected in this research is specifically designed to track changes in motives and test a range of other aspects of visitor behavior. It *was not designed* to identify changes in visitor numbers to the region. Data of this nature is compiled by Tourism Research Australia through its National Visitors Survey and International Visitor Survey series.

A final limitation that should be considered is the potential for social desirability bias where respondents over report 'good' behaviour and underreport 'poor' or 'undesirable' behaviour (Budeanu 2007). Because of these limitations, some care will be required when generalizing the results.

3. Findings

This section presents findings for 2009, as well as for 2007, 2008 and for the overall survey period 2007–2009. The first three years of data (2007–2009) were aggregated to create a three year average against which future changes in visitor characteristics may be measured. In most cases data has been disaggregated into domestic and international visitors and, where specific variables, such as age, are reported on, data has been disaggregated into specific subcategories. In the discussion on age for example, data is presented by specific age sub grouping such as the 20-29 year age group and the over 60s age group. One of the advantages of this approach, and made possible by the size of the sample, is that it is possible to develop quite detailed information about the characteristics of specific subsets. This will be demonstrated in an analysis of professional visitors.

3.1 Socio-demographic characteristics

Gender and origin of respondents (n =4534)

Survey staff were directed to approach equal numbers of males and females who appeared to be aged 18 years or above. As is common in surveys of this nature, there was a higher response rate for females than males. On a gender basis, 55.6% of respondents for the 2007–2009 survey period were females (56.1% in 2009; 53.8% in 2008; 57.1% in 2007). The response rate from males for the, 2007–2009 survey period was 44.4% males (43.9% in 2009; 46.2% in 2008; 42.9% in 2007). This gender ratio of responses remained largely consistent throughout the survey period with a slight fall in females completing the survey in 2008 (53.8%).

For the 2007–2009 survey period, 57.3% of domestic respondents were female (42.7% male) and 54.4% of international respondents were female (45.6% male). The 2009 survey produced similar results with females comprising 56.7% of domestic respondents (43.3% male) and 55.3% of international respondents (44.7% male).

Figure 1 shows visitor origins for 2007, 2008, 2009 and for the 2007-2009 survey period. After domestic visitors, the second largest group of respondents was from the United Kingdom (UK) and Ireland, followed by North America and Europe.

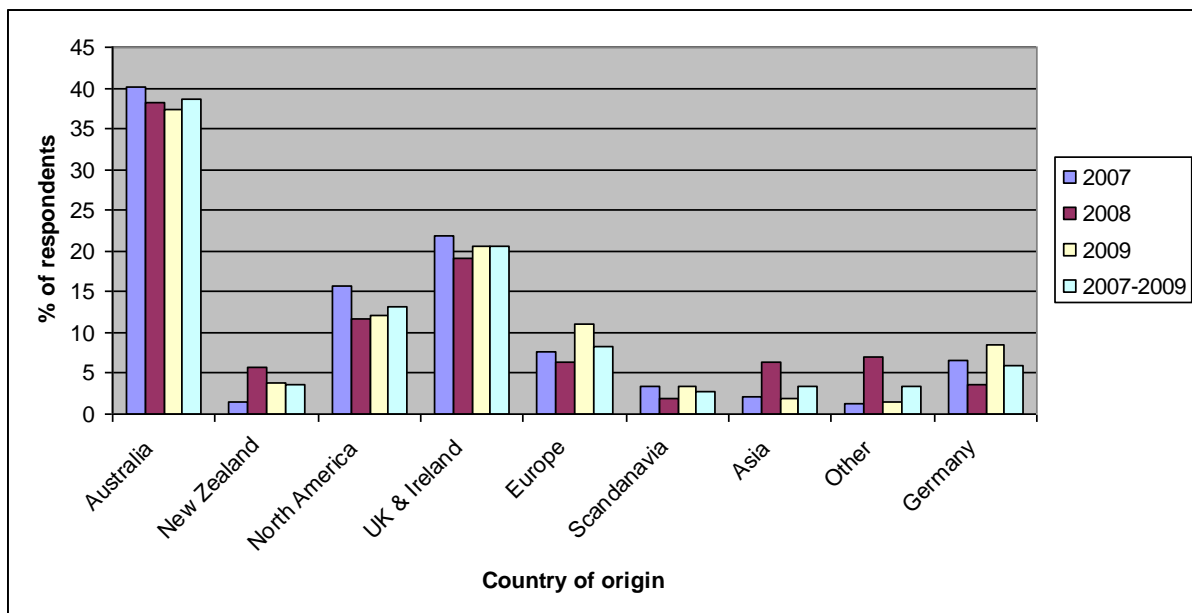


Figure 1: Origin of respondents (as percentages for 2007, 2008, 2009 and the 2007-2009 survey period).

Of the 57.3% of domestic visitors who visited this region almost two thirds originated from either Victoria (33.26%) or Queensland (25.75%). Visitors from New South Wales accounted for 21.52% of the domestic market (Figure 2).

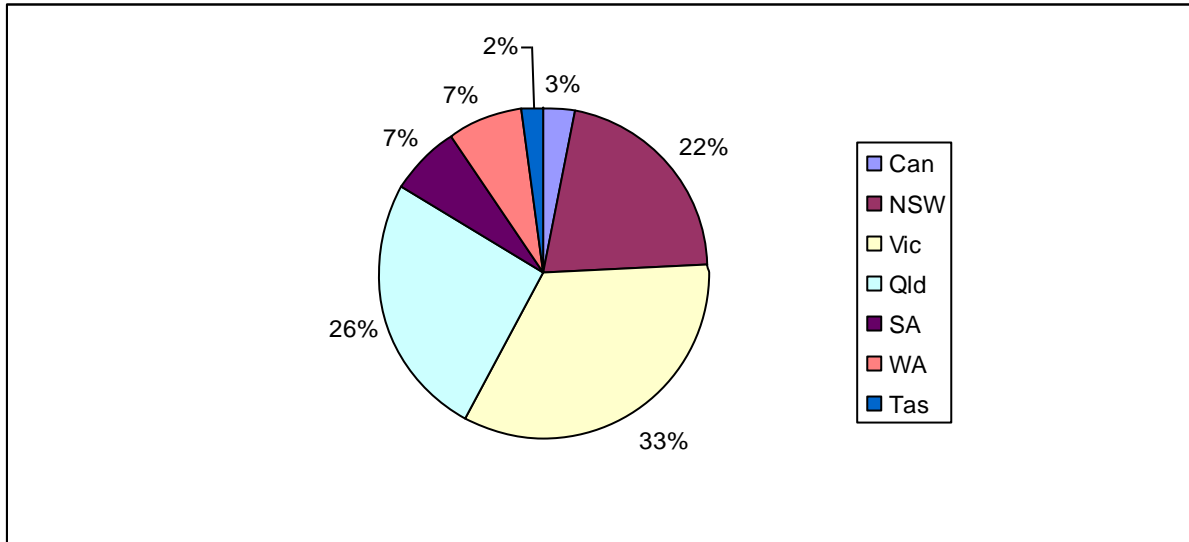


Figure 2: State of origin of respondents (as percentages of the 2007-2009 survey period).

Occupation (n= 4534)

Figure 3 indicates that, by occupation, the largest group of respondents were professionals (overall 23.5%; in 2009, 23.6%; in 2008, 24.8%; in 2007, 22.0%), followed by students (16.8% overall, 19.2% in 2009; 14.5% in 2008; 16.5% in 2007). A further 14.3% of respondents in the 2007–2009 survey period were retirees/semi-retirees (11.7% in 2009; 12.4% in 2008; 18.6% in 2007).

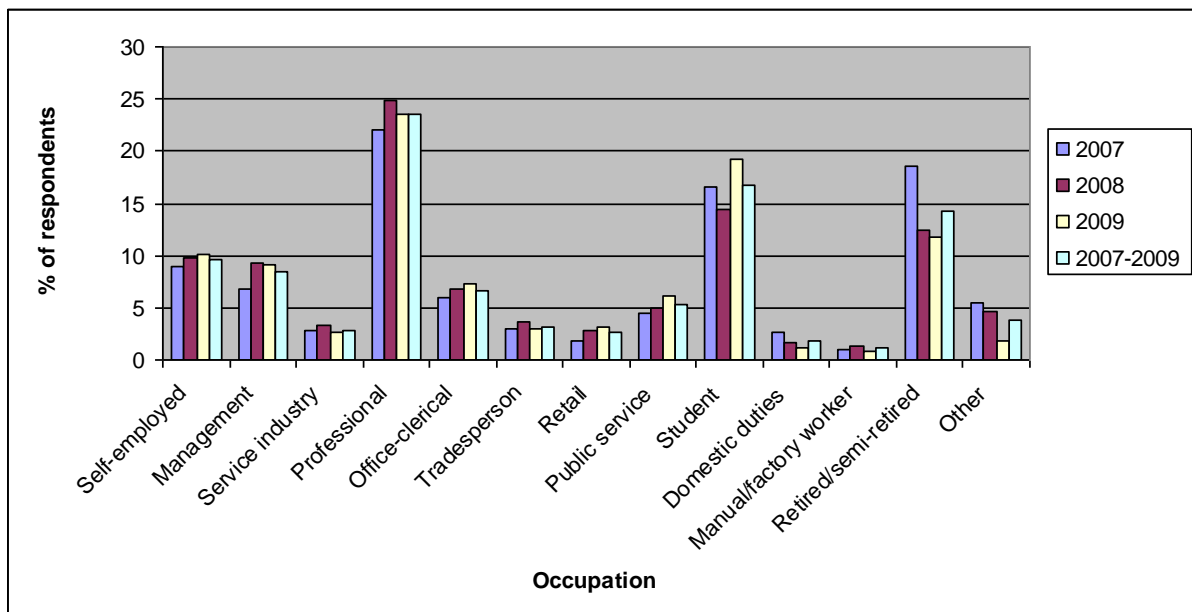


Figure 3: Occupation of respondents (as percentages of 2007, 2008, 2009 and the 2007-2009 survey period).

Table 1 compares the occupations of domestic and international respondents during 2009 and for the 2007–2009 survey period. Findings were generally similar during the 2007–2009 survey period for both domestic and international visitors, with the exception of domestic students (11.3% in 2009 and 9.3% for the 2007–2009 survey period) and international students (24.4% in 2009 and 21.4% for the 2007–2009 survey period).

Table 1: Comparison of domestic and international respondents' occupations in 2009 and the 2007-2009 survey period

Occupation	2009 sample		2007-2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Self-employed	11.9	9.1	12.2	7.9
Management	10.1	8.3	8.4	8.3
Service industry	3.0	2.1	2.8	2.8
Professional	22.0	25.1	24.0	23.2
Office-clerical	7.3	6.9	6.7	6.6
Tradesperson	4.9	1.6	4.4	2.4
Retail	5.0	2.1	4.1	1.7
Public service	4.7	7.4	5.5	5.0
Student	11.3	24.4	9.3	21.4
Domestic duties	1.6	1.1	2.5	1.4
Manual/factory work	1.8	0.4	1.5	0.9
Retired/semi-retired	14.9	9.7	14.5	14.5
Other	1.5	1.8	4.1	3.9

Age of Respondents (n = 4533)

Figure 4 presents the age composition of respondents in 2007, 2008, 2009 and for the 2007–2009 survey period. Combined, the 20-29 and 30-39 years age groups make up over 43.8% of the 2007–2009 survey period (45.7% in 2009; 43.7% in 2008; 42.9% in 2007). The 60-65 and the 65+ groups together totalled 19.5% of the 2007–2009 survey period (20.8% in 2009; 16.9% in 2008; 27.1% in 2007).

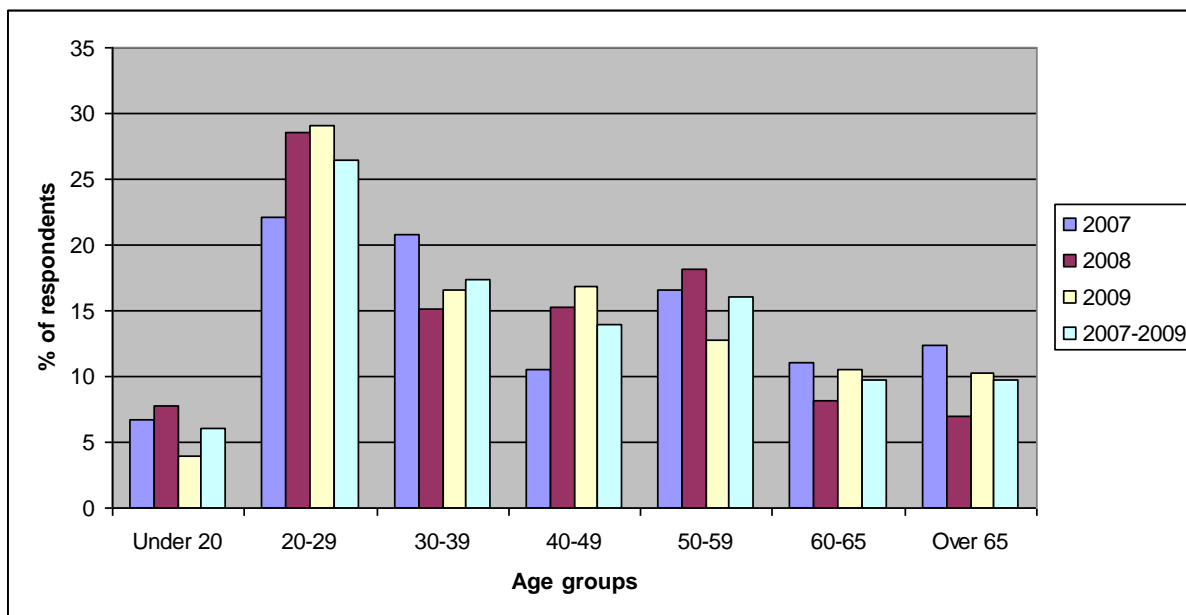


Figure 4: Age of respondents (as percentages of 2007, 2008, 2009 and the 2007-2009 survey period).

Table 2 illustrates the main differences between domestic and international visitors in both the 2009 and 2007-2009 survey periods. Compared to domestic visitors, there were substantially more international respondents in the <20 years and 20-29 years groups in 2009 and for the 2007-2009 survey period. Throughout the 2007-2009 survey period respondents in the 60-65 year, over 65 years age and <20 years of age were the smallest age based groups (Table 2).

Table 2: Comparison of age groups of domestic and international respondents in 2009 and the 2007-2009 survey period.

Age group	2009 sample		2007-2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Under 20 yrs	3.4	4.2	5.1	6.4
20-29 yrs	20.9	34.8	20.6	30.4
30-39 yrs	17.8	16.2	18.7	16.7
40-49 yrs	14.9	17.2	15.7	12.8
50-59 yrs	15.9	10.7	19.1	14.2
60-65 yrs	12.6	9.3	10.5	9.6
Over 65 yrs	14.5	7.6	10.3	9.9

3.2 Travel behaviour and motivations for travel

Travel party (n = 4362)

The largest travel party sector was couples which accounted for 42.6% of the 2007-2009 survey period (Figure 5); a rate which remained constant for each year of this survey (4.35% in 2009; 42.4% in 2008; 42.1% in 2007). Following couples, the most significant travel party groups were respondents travelling alone (16.2% for the 2007-2009 survey period, 14.5% in

2009; 15.3% in 2008; 18.6% in 2007) and with friends (15.5% of the 2007–2009 survey period; 18.8% in 2009; 16.0% in 2008; 12.8% in 2007).

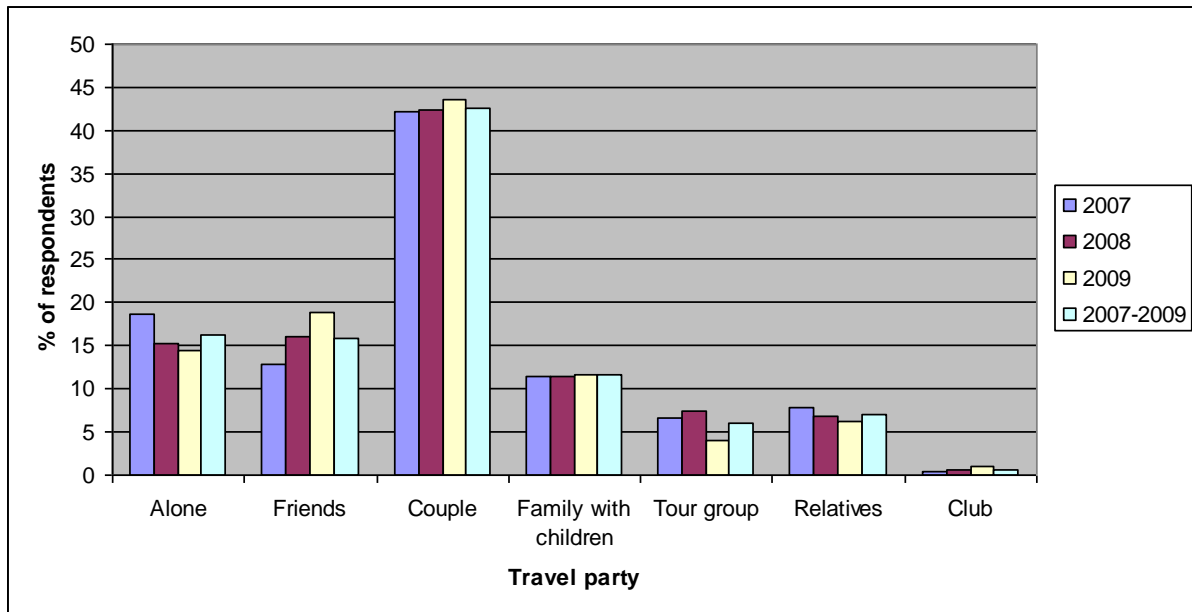


Figure 5: Travel party of visitors surveyed (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Based on travel party, more domestic visitors travelled as a couple than internationals in both 2009 and during the 2007–2009 survey period. A similar pattern was identified with respondents travelling alone and travel parties consisting of a family with children in both 2009 and the 2007–2009 survey period (see Table 3). International travellers in both periods were more likely to travel as friends compared to domestic visitors.

Table 3: Comparison of travel parties of domestic and international respondents in 2009 and the 2007–2009 survey period.

Travel Party	2009 sample		2007-2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Alone	14.8	14.6	18.3	14.9
Friends	12.6	22.5	10.5	19
Couple	48.1	39.9	47.6	39.2
Family with children	12.4	11.7	13	11
Tour group	2.4	5.3	1.8	8.9
Relatives	7.3	5.7	7.6	6.7
Club	2.4	0.3	1.2	0.3

First visit and length of stay (n = 4362)

During the 2007–2009 survey period, 66.6% (66.7% in 2009; 65.9% in 2008; 67.3% in 2007) of respondents were first-time visitors to North Queensland (Figure 6).

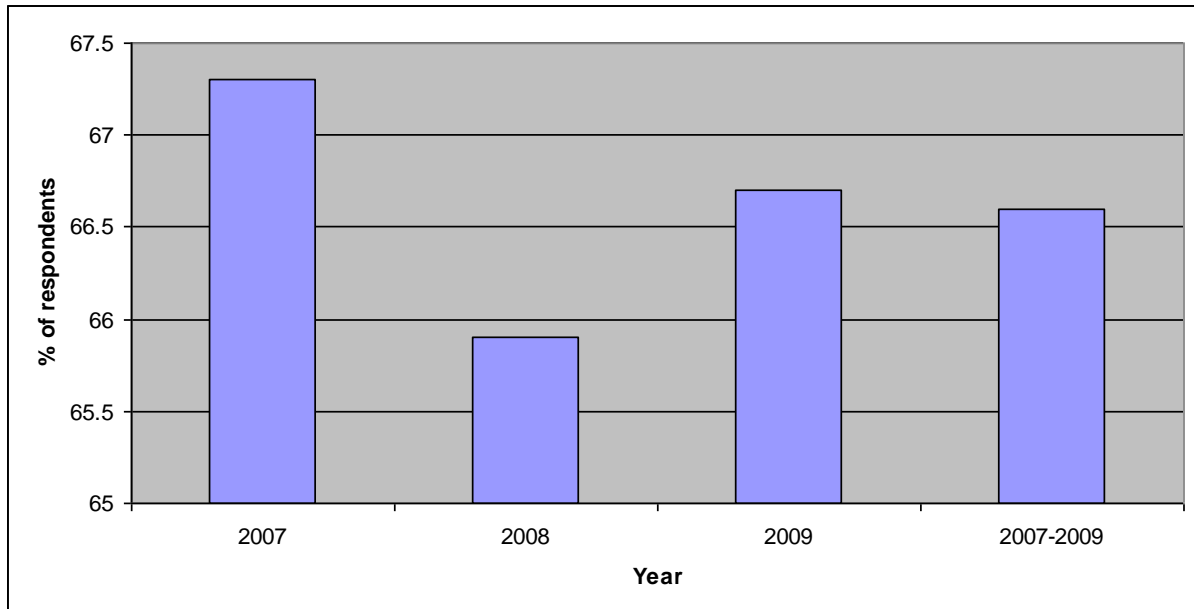


Figure 6: Percentage of respondents on their first visit to North Queensland (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Of the remaining 33.4% of respondents for the 2007–2009 survey period (33.3% in 2009; 34.1% in 2008; 32.7% in 2007) who had visited North Queensland on a previous occasion, 62.7% (69.7% in 2009; 65.6% in 2008; 52.8% in 2007) had visited the region up to three times previously.

For the 2009 survey period, the average length of nights spent by all respondents in Tropical North Queensland was 7.41. For domestic respondents, the average length of stay was 7.31 nights and slightly more for international visitors, where the average was 7.55 nights.

Accommodation (n = 4540)

Patterns of accommodation varied considerably over the period of the survey (Figure 7). Hotels/motels were the most popular form of accommodation (33.4% for the 2007–2009 survey period; 27.9% in 2009; 34.9% in 2008; 36.7% in 2007) followed by holiday apartments, backpacker hostels and resorts. One form of accommodation that shows a consistent pattern of growth is the caravan park/cabin sector. This appears to reflect the growing popularity of self contained villas that are now found in a growing number of caravan parks.

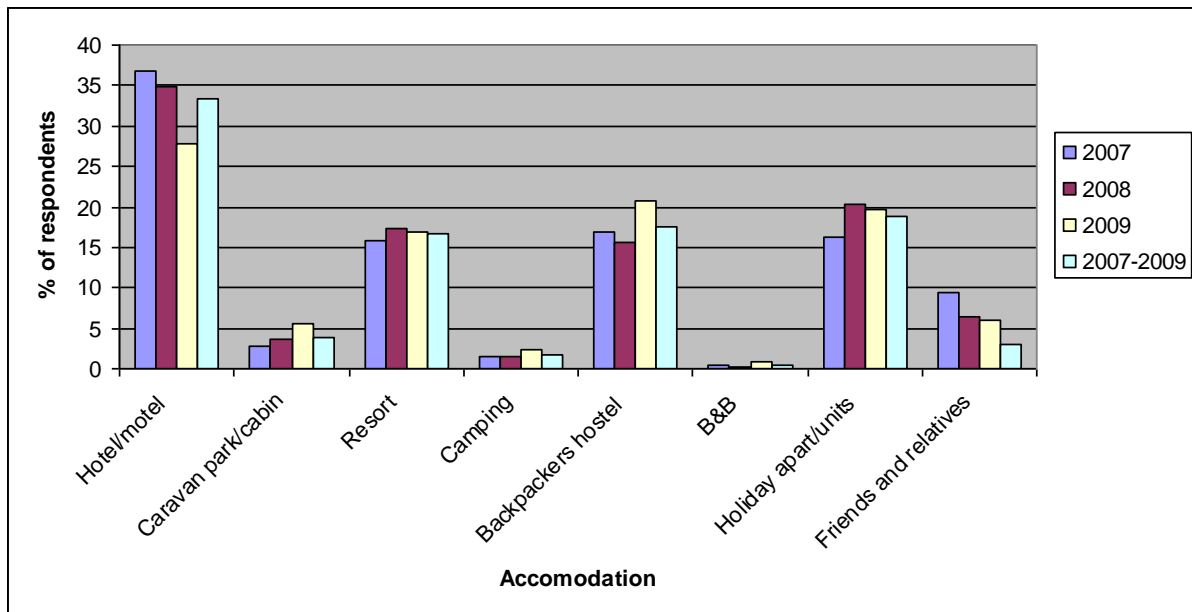


Figure 7: Accommodation type (as percentages of 2007, 2008, 2009 and the 2007-2009 survey period).

Domestic and international respondents' accommodation preferences for 2009 and the 2007–2009 survey periods are compared in Table 4. International respondents preferred accommodation options were hotels/motels and backpacker hostels in 2009 and the 2007–2009 survey period whereas domestic visitors' preferences were holiday apartments/units, resorts or hotel/motels.

Table 4: Comparison of accommodation types chosen by domestic and international respondents in 2009 and the 2007–2009 survey period.

Accommodation type	2009 sample		2007–2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Hotel/motel	20.9	31.2	24.1	38.9
Caravan park/cabin	3.5	6.6	3.2	4.4
Resort	28.1	10.5	26.7	10.5
Camping	2.3	2.3	1.5	1.9
Backpackers hostel	5.5	30.9	4.0	26.6
B&B	0.8	0.8	0.5	0.5
Holiday apart/units	27.7	14.6	26.1	14
Friends & relatives	11.2	3.1	13.9	3.2

Motivations (n = 4362)

The airport 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). Motives were based on the region's pull factors, that is the activities and attractions that differentiated the region from its competitors in the mind of its visitors. It is clear that visiting the Great Barrier Reef (mean =

4.26 for 2007-2009 survey period; m=4.29 in 2009; m=4.24 in 2008; m=4.26 in 2007) and the rainforest (mean = 3.94 for the period 2007 to 2009; m=3.82 in 2009, m=3.92 in 2008; m=3.90 in 2007) were among the most important motivations for visiting North Queensland (Figure 8). Other motivations that respondents considered to be important were: seeing the natural environment (mean = 3.88 for the 2007–2009 survey period, m=3.82 in 2009; m=3.92 in 2008; m=3.90 in 2007) and wildlife (mean = 3.82 for the 2007–2009 survey period; m=3.85 in 2009; m=3.80 in 2008; m=3.82 in 2007) and rest and relaxation (mean = 3.98 for 2007–2009; m=3.89 in 2009; m= 4.07 in 2008; m=3.89 in 2007).

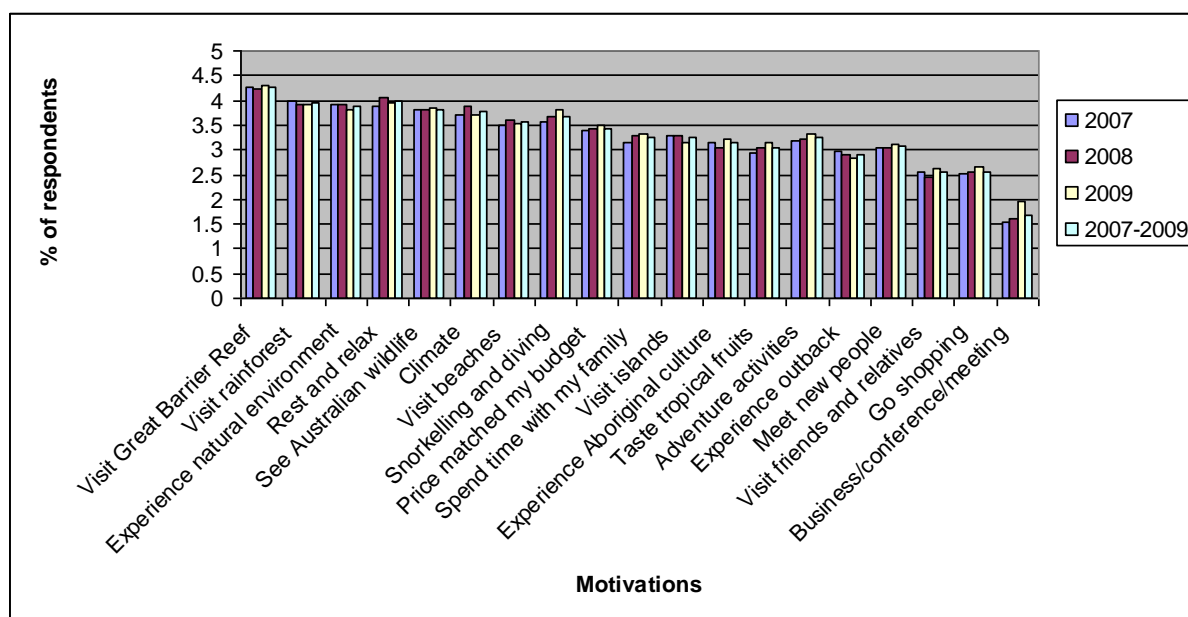


Figure 8: Respondents' motivations for visiting North Queensland (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

A comparison of motivations between international and domestic respondents is presented in Table 5. Results indicate that there are significant differences in motivations between domestic and international visitors. The ranking of individual motives for domestic and international respondents is highlighted in Table 6.

Table 5: Comparison of domestic and international respondents' motivations for visiting North Queensland 2009 and the 2007–2009 survey period.

Motivations	2009 sample		2007-2009 survey period	
	Domestic (mean)	International (mean)	Domestic (mean)	International (mean)
Visit Rainforest	3.65	4.08	3.73	4.59
Visit Great Barrier Reef	3.75	4.61	3.71	4.09
Experience natural environment	3.72	3.87	3.77	3.96
Rest and relax	4.18	3.83	4.23	3.81
See Australian wildlife	3.34	4.16	3.27	4.16
Climate	3.8	3.68	3.86	3.72
Visit beaches	3.49	3.57	3.49	3.59
Snorkelling and diving	3.5	3.98	3.3	3.9

Price matched my budget	3.57	3.42	3.5	3.38
Spend time with my family	3.49	3.18	3.5	3.05
Visit islands	3.04	3.2	3.13	3.32
Experience Aboriginal culture	2.74	3.48	2.69	3.4
Taste tropical fruits	3.03	3.19	2.98	3.06
Adventure activities	3.03	3.46	2.99	3.39
Experience outback	2.56	3	2.83	3.12
Meet new people	2.97	3.21	2.83	3.21
Visit friends and relatives	2.7	2.58	2.69	2.44
Go shopping	2.56	2.67	2.54	2.56
Business/conference/meeting	1.94	1.92	1.81	1.59
Visit Rainforest	3.65	4.08	3.73	4.59
Visit Great Barrier Reef	3.75	4.61	3.71	4.09

Table 6 illustrates the overall rank for each motivation from the 2007–2009 survey period, followed by the ranking of each motivation disaggregated into domestic and international respondents. It is apparent that basing motivations for visiting the region only on the aggregated mean may be misleading. For example, for the aggregated data set, visiting the rainforest is the primary motive for all respondents but when the data set is disaggregated into domestic and international visitors the rainforest was ranked third by domestic respondents ($m=3.73$) but first by international respondents ($m=4.59$).

There were considerable differences in the ranking given to motivations by domestic and international visitors. The top seven motives for visiting the region during the 2007–2009 survey period for domestic visitors were: rest and relax (1), climate (2), experience the natural environment (3), visit the rainforest (4), visit the Great Barrier Reef (5), visit the beaches (6) and in equal seventh place price matched my budget and to visit friends and relatives. For international visitors, the top seven motives were to visit the rainforest (1), see Australian wildlife (2), visit the Great Barrier Reef (3), experience the natural environment (4), snorkelling and diving (5), rest and relax (6) and climate (7).

Analysis of the remaining motives indicates that there is relatively strong interest by international visitors ($m=3.4$) in indigenous culture and adventure activities ($m=3.39$). One surprising finding was that strength of motivations was generally higher for international visitors than domestic visitors. For example, ‘visit the rainforest’ achieved a mean of 4.59 for internationals but only 3.73 for domestic visitors. Similarly, the mean for international visitors to visit the Great Barrier Reef was 4.09 compared to 3.71 for domestic visitors.

The size of the mean is a strong indication of the strength of attraction in the visitors’ set of ‘push’ factors, that is the factors that encouraged them to visit the region. Where the mean falls below 4, a significant number of respondents gave a neutral response of 3 on the 5-point likert scale. Where the mean is 4 or above, a significant number of respondents viewed the motive as important or very important.

Table 6: The rank for each travel motivation by the 2007–2009 survey period, and by domestic and international visitors.

Rank	2007–2009 survey period	Domestic visitors surveyed	International visitors surveyed
1	Visit Great Barrier Reef	Rest and relax	Visit Rainforest

2	Rest and relax	Climate	See Australian wildlife
3	Visit rainforest	Experience natural environment	Visit Great Barrier Reef
4	Experience natural environment	Visit Rainforest	Experience natural environment
5	See Australian wildlife	Visit Great Barrier Reef	Snorkelling and diving
6	Climate	Price matched my budget	Rest and relax
7	Snorkelling and diving	Spend time with my family	Climate
8	Visit beaches	Visit beaches	Visit beaches
9	Price matched my budget	Snorkelling and diving	Experience Aboriginal culture
10	Spend time with my family	See Australian wildlife	Adventure activities
11	Visit islands	Visit islands	Price matched my budget
12	Adventure activities	Adventure activities	Visit islands
13	Experience Aboriginal culture	Taste tropical fruits	Meet new people
14	Meet new people	Experience outback	Experience outback
15	Taste tropical fruits	Meet new people	Taste tropical fruits
16	Experience outback	Experience Aboriginal culture	Spend time with my family
17	Go shopping	Visit friends and relatives	Go shopping
18	Visit friends and relatives	Go shopping	Visit friends and relatives
19	Business/conference/meeting	Business/conference/meeting	Business/conference/meeting
20	Visit Great Barrier Reef	Rest and relax	Visit Rainforest
21	Rest and relax	Climate	See Australian wildlife

Information sources (n = 4540)

The most popular source of information on Tropical North Queensland was friends and relatives (2007–2009 survey period 41.3%; 42.0% in 2009; 39.9% in 2008; 42.7% in 2007). Figure 9 further illustrates that the internet (30.9% for the 2007–2009 survey period; 35.2% in 2009; 30.4% in 2008; 27.4% in 2007) followed by guide books (30.0% for the 2007–2009 survey period; 33.5% in 2009; 25.5% in 2008; 31.5% in 2007) were also important sources of information for respondents.

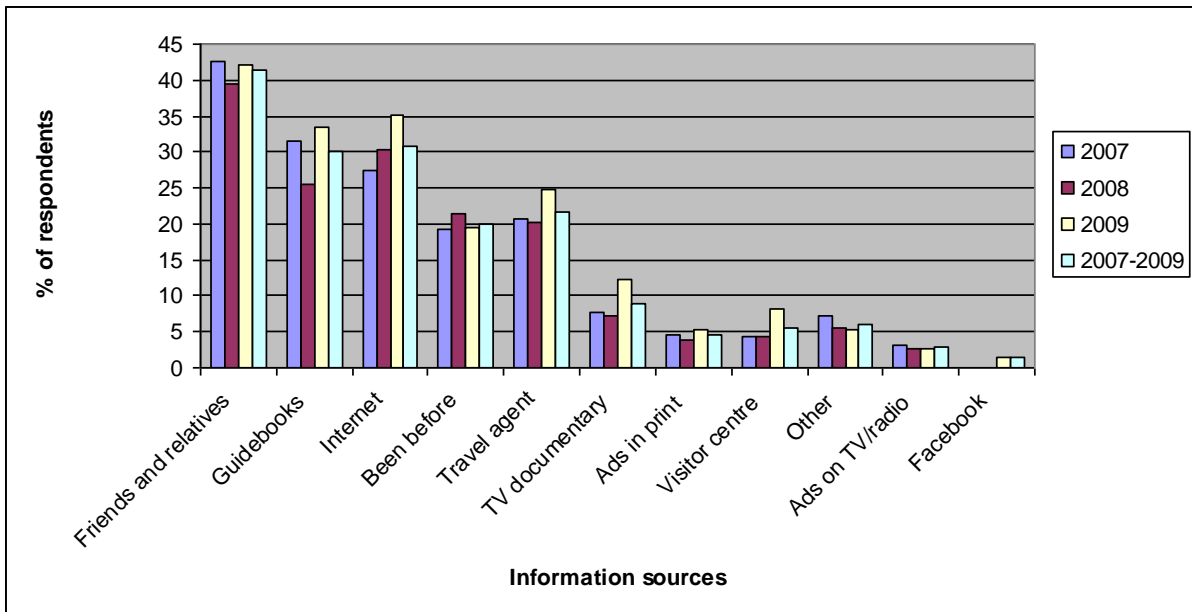


Figure 9: Information sources used by surveyed visitors (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Table 7 highlights differences in the information sources used by domestic and international respondents. For example, domestic respondents in both the 2009 and the 2007–2009 survey periods used friends and relatives, previous experience of the destination and the internet as their main sources of information. International respondents used the experience of friends and relatives, guide books and the internet as their major sources of information.

These findings highlight the growing importance of the internet as an information tool as well as a marketing medium and, in the international sector, identify word of mouth as being a very important factor in the decision making process of international respondents. As highlighted later in Table 10, the destination is seen as being very safe and able to provide a high level of overall satisfaction (Figure 14).

Table 7: Comparison of domestic and international respondents' information sources in 2009 and the 2007–2009 survey period.

Information sources	2009 sample		2007–2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Friends and relatives	39.4	44.2	39.3	42.8
Guidebooks	17.5	43.6	14.1	40.6
Internet	31.7	37.5	27.2	33.5
Been before	23.6	17.2	33.0	25.5
Travel agent	24.6	23.8	15.2	9.4
TV documentary	7.9	15	6.9	10.4
Ads in print	7.7	3.8	6.7	3.1
Visitor centre	7.1	8.5	4.2	6.2
Other	5.9	4.6	7.6	5.1
Ads on TV/radio	4.1	1.7	4.5	1.7

3.3 Respondents' experiences in and satisfaction with Tropical North Queensland

Visits to rainforests of the Wet Tropics (n = 4175)

During the 2007–2009 survey period, 76.1% (76.7% in 2009; 74.0% in 2008; 77.6% in 2007) of respondents reported visiting the Wet Tropics World Heritage rainforests as part of their trip to the region. As Figure 10 shows, the key hotspots for experiencing the rainforest included Kuranda (51.3% in the 2007–2009 survey period; 52.5% in 2009, 49.3% in 2008; 53.0% in 2007), Daintree (35.7% in the 2007–2009 survey period; 36.5% in 2009; 34.0% in 2008; 37.3% in 2007) and Mossman Gorge (32.5% in the 2007–2009 survey period; 35.4% in 2009; 30.1% in 2008; 32.5% in 2007).

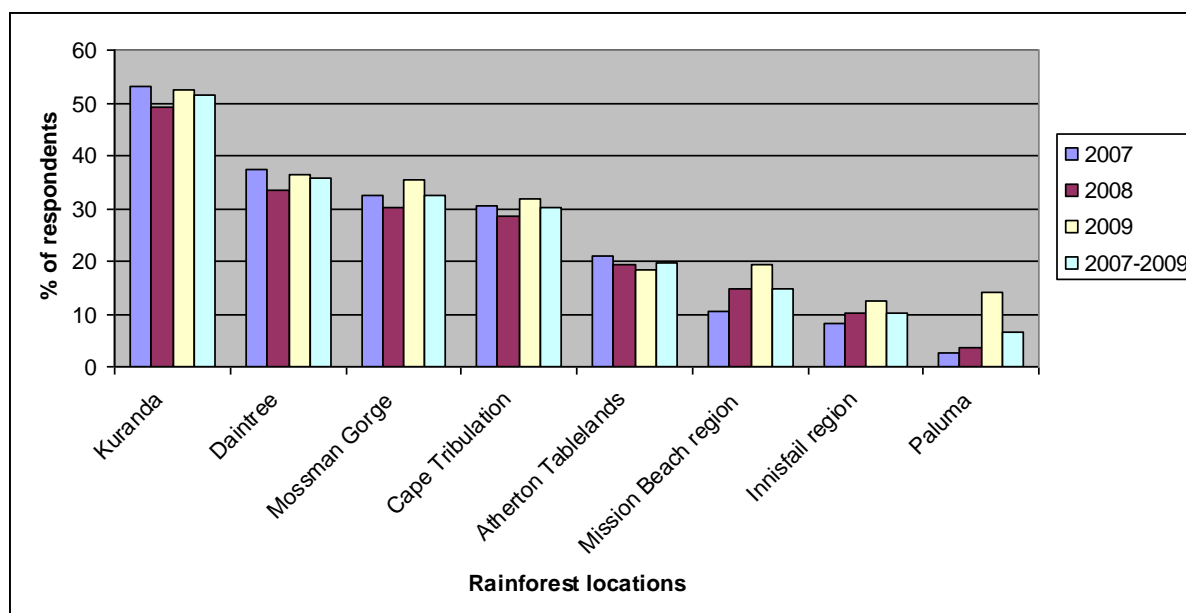


Figure 10: Rainforest locations visited by respondents (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Table 8 provides a comparison of rainforest visitation patterns in 2009 and the 2007–2009 survey period between domestic and international respondents. The data shows that international respondents were more likely to visit the Wet Tropics rainforests in Kuranda, Cape Tribulation, the Mission Beach area, and Paluma, while domestic respondents were more likely to visit rainforest sites in Mossman Gorge, Atherton Tablelands and the Innisfail region.

Table 8: Comparison of rainforest locations visited by domestic and international respondents in 2009 and the 2007–2009 survey periods.

Rainforest locations	2009 sample		2007–2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Kuranda	48.3	54.1	48.7	53.3
Daintree	33.7	38.6	36.8	35.5
Mossman Gorge	38.2	34.0	36.2	30.3
Cape Tribulation	24.4	37.1	27.2	32.7
Atherton Tablelands	21.1	16.5	25.8	15.9
Mission Beach region	13.9	22.7	13.0	15.7
Innisfail region	14.0	11.2	13.7	7.9
Paluma	11.1	15.7	5.7	6.6

Figure 11 reports on the reasons given by respondents for **not** visiting the rainforest (23.9% in the 2007–2009 survey period; 23.3% in 2009; 26.0% in 2008; 22.4% in 2007). 'Not enough time' was the major reason given (19.6% for the 2007–2009 survey period; 23.8% in 2009; 20.1% in 2008; 15.4% in 2007) followed by 'not interested in the rainforest' (5.8% of the 2007–2009 survey period; 9.9% in 2009; 5.5% in 2008; 2.5% in 2007) and that activities they wished to participate in were not available.

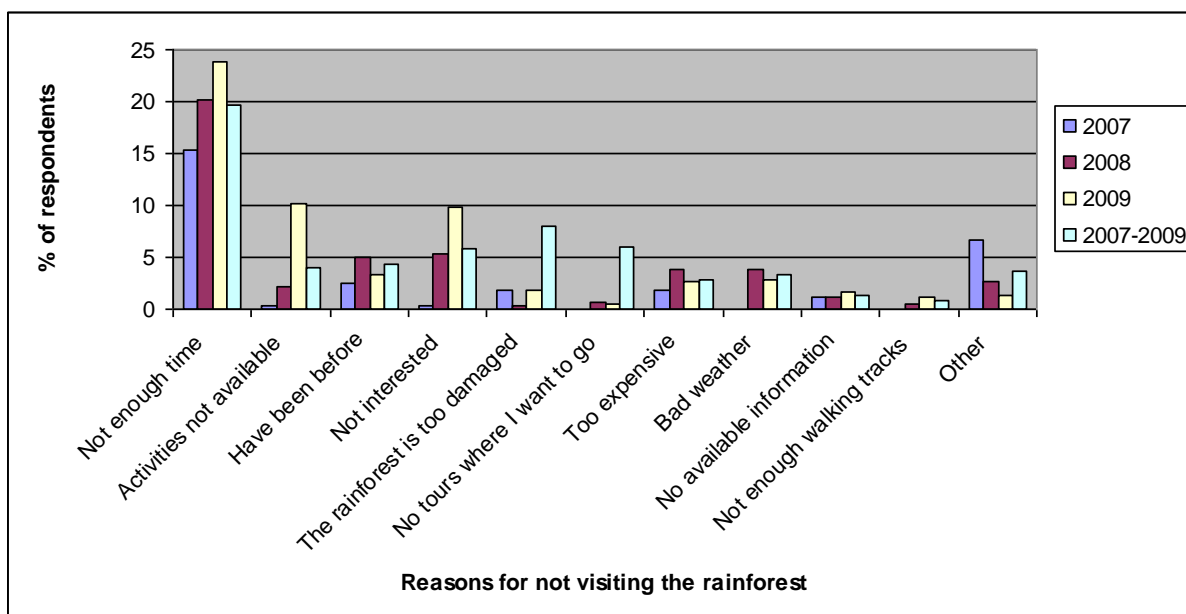


Figure 11: Respondents' reasons for not visiting the rainforests of North Queensland (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Overseas rainforests visited by domestic and international respondents

The survey asked respondents for details of previous visits to rainforests. Respondents were further asked to rate their satisfaction levels of these rainforests on a scale of 1 (“Very unsatisfied”) to 5 (“Highly satisfied”). Results indicate that rainforests in Thailand (n=73) received the most visitations and were given a satisfaction mean of 3.97. Costa Rica (n=56) was the second most visited (mean=4.39) followed by Brazil (n=53; mean=4.29), Malaysia (n=47; mean=4.04) and Hawaii (n=46; mean 4.42)

Interestingly, many respondents indicated that they had visited tropical rainforests in New Zealand (n=25) and other temperate zones, suggesting a limited understanding of what a “tropical” rainforest actually is.

Visits to the Great Barrier Reef (n=3979)

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. For the 2007–2009 survey period, 74.2% (79.0% in 2009; 73.7% in 2008; 70.9% in 2007) of respondents visited the Great Barrier Reef with the majority of respondents departing from Cairns (43.4% in the 2007–2009 survey period; 38.0% in 2009; 46.6% in 2008; 46.6% in 2007) and, to a lesser extent, Port Douglas (19.7% for the 2007–2009 survey period; 17.7% in 2009; 21.2% in 2008; 20.6% in 2007).

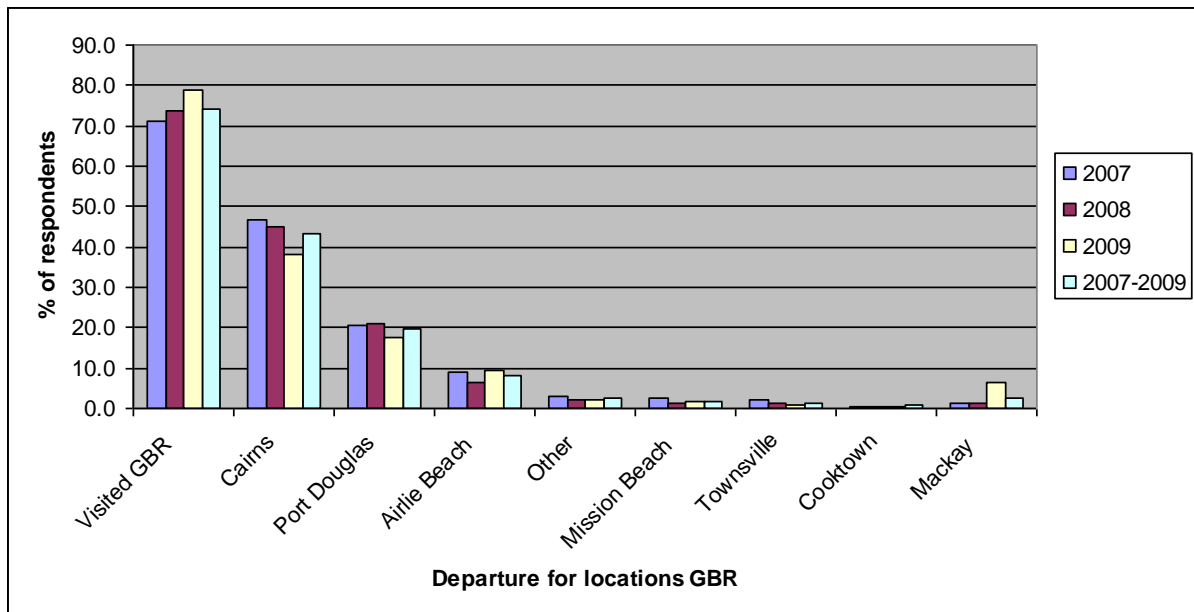


Figure 12: Departure locations for the Great Barrier Reef in 2007, 2008, 2009 and the 2007–2009 survey period.

International respondents were more likely than domestic respondents to visit the Great Barrier Reef in 2009 and in the 2007–2009 survey period (see Table 9).

Table 9: Comparison of departure locations for the Great Barrier Reef for domestic and international respondents in 2009 and the 2007–2009 survey period.

Departure location	2009 sample		2007–2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Visited GBR	60.9	89.8	51.9	88.4
Cairns	25.8	46.2	27.6	54.2
Port Douglas	16.5	18.8	16.8	22.0
Airlie Beach	3.7	13.8	2.7	11.9
Other	1.2	2.9	2.4	2.7
Mission Beach	1.4	1.7	1.8	1.7
Townsville	0.8	0.9	1.1	1.6
Cooktown	0.6	0.1	0.8	0.6
Mackay	2.8	8.6	1.4	3.5

Figure 13 outlines the key reasons given by respondents for **not** visiting the Great Barrier Reef. The most significant response was lack of time (13.5% of the 2007–2009 survey period) and because the respondent had been before (8.5% for the 2007–2009 survey period).

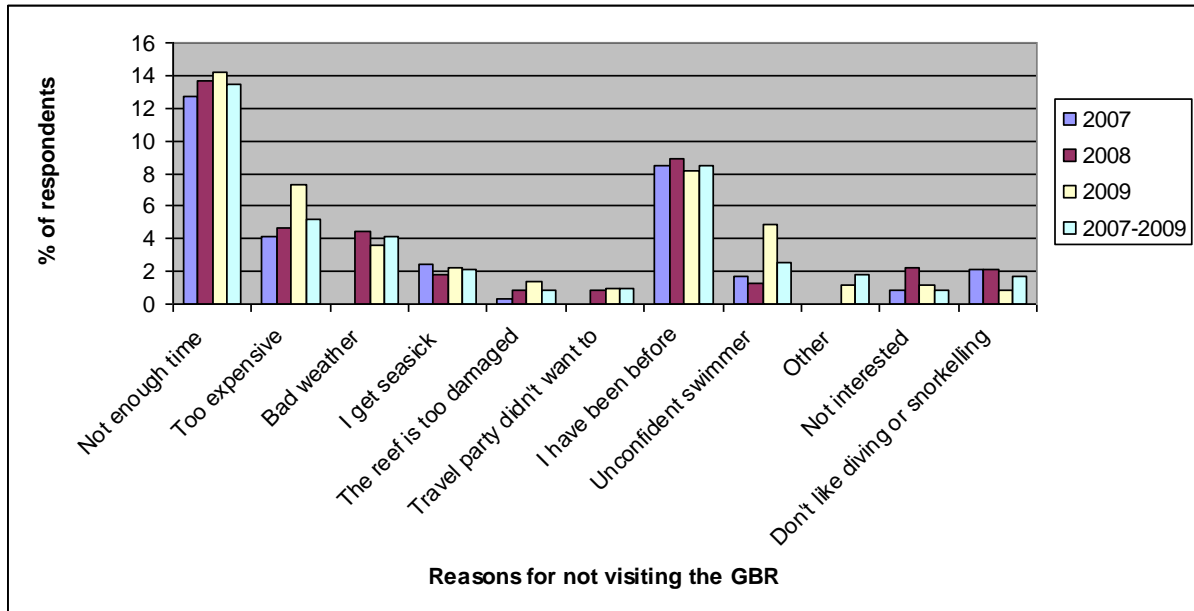


Figure 13: Respondent's reasons for not visiting the Great Barrier Reef (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period).

Activities Undertaken while at the Reef (n = 2765)

Figure 14 illustrates activities undertaken by visitors to the Great Barrier Reef in 2008, 2009 and the 2008–2009 survey period. The data shows that the majority of respondents went snorkelling (54.0% in the 2008–2009 survey period; 51.6% in 2009; 56.2% in 2008) with swimming being the second most popular activity (46.5% in the 2008–2009 survey period; 48.10% in 2009; 45.1% in 2008) for all visitors. No data was collected in the 2007 annual period.

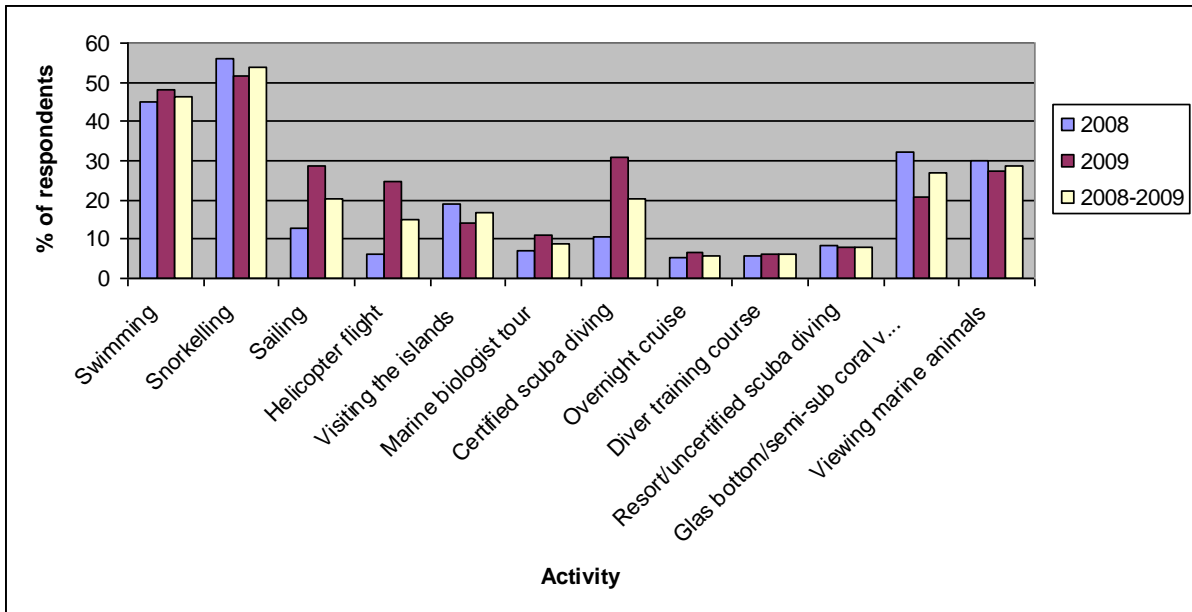


Figure 14: Most popular activities undertaken by visitors to the Great Barrier Reef (as percentages of 2008, 2009 and the 2008–2009 survey period).

During the 2008–2009 survey period, international respondents were much more likely to participate in snorkelling (63.9%) than their domestic counterparts (36.9%). There were also significant differences between domestic and international respondents for swimming and diving. Overall, international respondents have a much higher level of participation in reef activities than domestic visitors.

Table 10: Comparison of activities undertaken on the Great Barrier Reef for domestic and international respondents in 2009 and the 2008–2009 survey period.

Which activities on GBR	2009		2008–2009 survey period	
	Domestic (%)	International (%)	Domestic (%)	International (%)
Swimming	38.80	54.20	36.90	52.6
Snorkelling	38.30	61.50	39.50	63.9
Sailing	15.00	38.30	10.70	26.9
Helicopter flight	19.80	27.80	11.80	16.8
Visiting the islands	10.10	16.40	12.20	19.6
Marine biologist tour	8.70	12.50	7.20	10.2
Certified scuba diving	24.90	35.80	15.80	22.9
Overnight cruise	2.80	8.90	2.70	7.9
Diver training course	3.40	8.30	2.80	8.1
Resort/uncertified scuba diving	3.60	10.70	3.90	10.9
Glass bottom/sub coral viewing	16.10	22.30	20.80	30.4
Viewing marine animals	21.10	32.30	22.10	33.4

Service quality scorecard (n = 2260)

The level of service quality provided to visitors has a significant impact on visitor satisfaction and, importantly, on how they describe their experiences to others through word of mouth and, increasingly, through social networking sites such as Facebook, YouTube and Twitter. It is therefore critical that tourism destinations are aware of how they are being rated by their visitors in this important area. To develop a detailed view of how the region's service quality is perceived by visitors a service quality scorecard was included in the survey from 2008 onwards.

Respondents were asked to reflect on their satisfaction with service quality during their holiday in the region using a likert scale of 1 (Very unsatisfied) to 5 (Very satisfied). On this scale, a mean score of less than 4 indicates a general view that the item being rated has fallen below a satisfactory standard but not yet to an unsatisfactory level for a significant number of respondents. A score below 3 indicates significant 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 11 provides a summary of respondents' ranking of various service quality aspects during their stay, and provides a comparison between domestic and international visitors in 2008, 2009 and for the 2008–2009 survey period. Results outlined in Table 11 show that respondents' opinions on the region's service quality standards have been relatively constant over 2008 and 2009.

A number of results are pleasing, including for accommodation, tours and, particularly, respondents' perceptions of safety and security while in the destination. A number of responses are, however, of concern, including public transport, restaurants and shopping. The relatively low score for public transport is of particular concern given that the majority of visitors must rely on either public transport or tour coaches to visit attractions in the region. The poor result for public transport is an issue that requires specific attention as difficulty to visit attractions leads to frustration and low satisfaction, and loss of revenue for attractions. The relatively low score for restaurants is also a concern that needs to be investigated. As discussed previously, restraints on the length of the survey prevented a more detailed analysis of service quality issues. Given the importance of this issue, further research is required.

Table 11: Comparison of domestic and international respondents' attitudes to service quality in North Queensland in 2008, 2009 and for the 2008–2009 study period.

Service quality aspects	Mean		
	2008 sample	2009 sample	2008–2009 average
Accommodation – friendly staff	4.19	4.21	4.21
Accommodation – value for money	3.93	3.98	3.96
Accommodation – service standard	3.91	3.97	3.95
Tours – guides were informative	4.07	4.11	4.09
Tours – value for money	3.80	3.86	3.82
Tour – service standards	3.95	3.99	3.97
Tours – were on-time	4.13	4.21	4.17
Attractions – value for money	3.78	3.92	3.84
Restaurants – staff were efficient	3.74	3.67	3.72
Restaurants – value for money	3.45	3.51	3.47
Restaurants – menu selections	3.60	3.69	3.64

Shopping – was good	3.44	3.34	3.40
Shopping – good variety	3.38	3.43	3.40
Shopping – closing times	3.33	3.26	3.29
Public transport – was accessible	3.46	3.45	3.45
Public transport – was on time	3.44	3.52	3.48
Visitor information – was accurate	3.89	3.94	3.91
Visitor information – was accessible	3.96	4.04	4.00
Felt safe/secure moving around	4.29	4.32	4.32

Budget of respondents and where they travelled during their trip (n = 3798)

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 budget for respondents in the 2007–2009 survey period was \$4529 (\$5031 in 2009; \$5747 in 2008; \$3748 in 2007). Table 12 provides a breakdown of the overall budgets for domestic and international visitors, and visitor occupation.

Table 12: Overall trip budget for surveyed visitors according to origin and occupation in 2009 and the 2007–2009 survey periods.

Origin or occupation	Overall budget (\$AUD)
International	5492.00
Domestic	3096.64
Manual/Factory Work	3356.80
Retired/Semi-retired	5284.98
Self-employed	4548.79
Retail	4009.68
Tradesperson	5262.21
Professional	4376.01
Domestic duties	4137.73
Other	3755.05
Management	7162.49
Office-Clerical	4218.85
Student	3178.90
Public Service	4643.79
Service Industry	3400.31

One of the final questions in the exit survey was designed to identify visitor dispersal in the region for respondents who had access to either a rental car or a private vehicle. The most popular places to visit were Port Douglas (39.5% for the 2007–2009 survey period; 36.1% in 2009; 48.2% in 2008; 36.0% in 2007) and Kuranda (36.1% for the 2007–2009 survey period; 39.7% in 2009; 42.8% in 2008; 26.7% in 2007) followed by the Daintree (it is possible that Port Douglas visits are also included in Daintree visits if the trip was undertaken in a single

day). Figure 15 shows the percentage of respondents who had travelled to these locations in 2007, 2008, 2009 and during the 2007–2009 survey period.

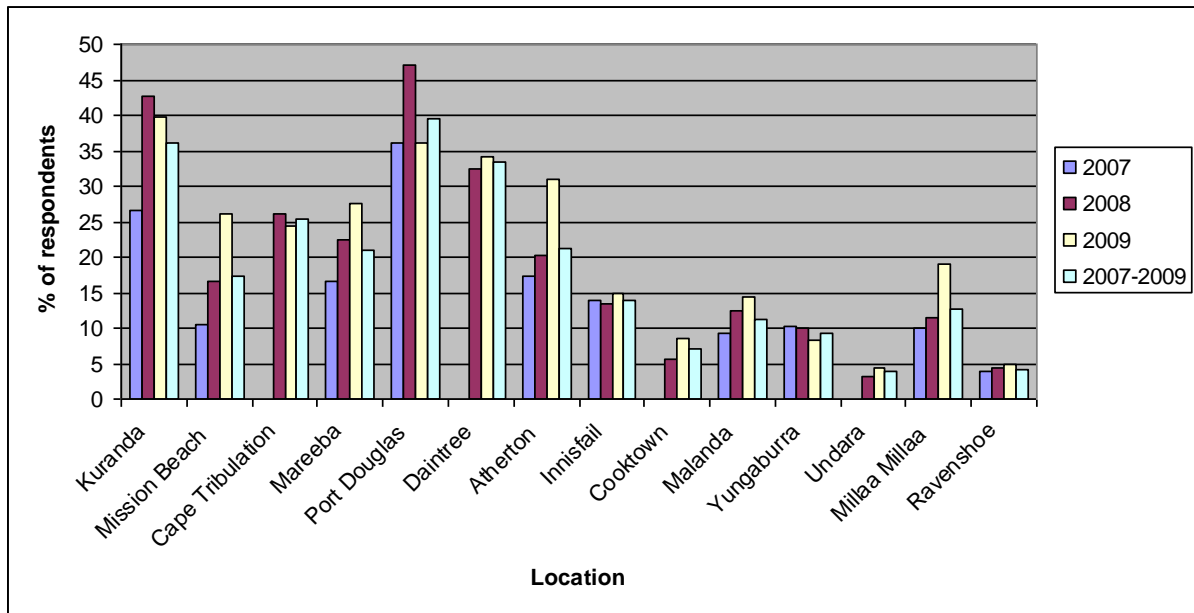


Figure 15: Locations travelled through or to during respondents' visit to North Queensland (as percentages of 2007, 2008, 2009 and the 2007–2009 survey period. Visitors were not asked if they had visited Cooktown, Undara, Cape Tribulation or the Daintree in 2007.

Overall satisfaction with visit to Tropical North Queensland (n = 3890)

Respondents 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 for the 2007–2009 survey period was 8.45 (8.51 in 2009; 8.37 in 2008; 8.46 in 2007), as shown in Figure 16. Furthermore, in comparing domestic and international respondents, domestic respondents were slightly less satisfied during the 2007–2009 survey period (m=8.33; m=8.44 in 2009) than their international counterparts (m=8.51 for the 2007–2009 survey period; m=8.55 in 2009).

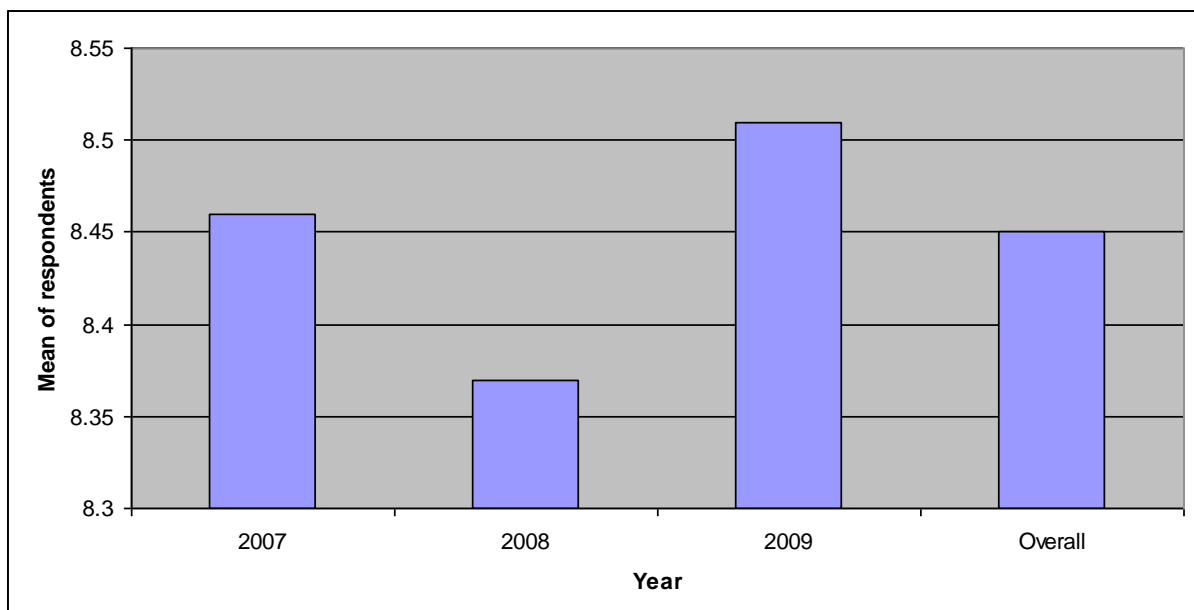


Figure 16: Respondents' satisfaction with their trip to North Queensland (as means of 2007, 2008, 2009 and the 2007–2009 survey period).

4. Case studies

As previously discussed, the data is rich and capable of being used to explore a wide range of specific issues that have not been dealt with in the previous discussion. To demonstrate how the data can be further mined to provide a rich source of information about specific issues, a number of case studies have been developed and are presented as industry fact sheets. As part of this project a significant number of fact sheets have been released outlining findings on specific areas of the research.

The following fact sheets are included in this report: couples' market, backpackers and New Zealand Visitors.

The potential exists for many more single issue reports of this nature.



“Backpacker Behaviour in Tropical North Queensland”

TNQ Tourism Factsheet 1: 2010

Aim

This fact sheet reports on the results of a long term visitor survey conducted at the departure lounge of the Cairns domestic airport. Specifically it highlights findings about the TNQ backpacker market

Who are they?

- Over 70% of backpackers are under 30 years old, with 9.0% aged under 20 years and 62.1% aged 20-29 years

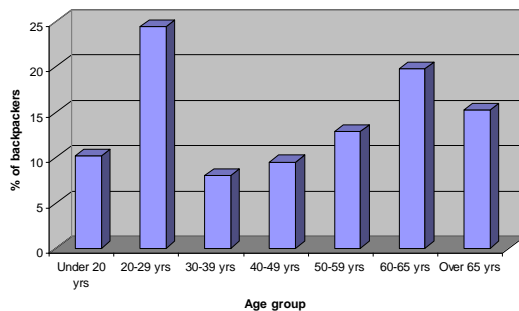


Fig 1: Age of respondents

- Backpackers were predominantly international visitors (91.5%)
- Most originate from the United Kingdom & Ireland (35.9%) followed by North America (16.0%), Europe (15.7%), Germany (14.0%) and Scandinavia (5.8%)
- The majority are students (43.6%) and one fifth were professionals (20.0%)
- Backpackers travel with friends (38.3%), alone (32.8%) or as a couple (17.9%)

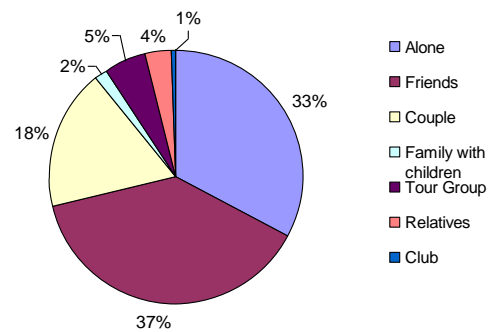


Fig 2: Travel Party Description

What do we know?

- Guidebooks (51.7%) were the most important source of information about this region for backpackers, followed by friends and relatives (46.7%) and the internet (34.5%)
- Their overall travel budget (including flights, accommodation and tours) was \$3,407.39
- Main transport used to visit TNQ was air (43.0%), followed by bus/coach (42.0%) and then by either rented (6.5%) or private (2.9%) car
- Backpackers typically spent between 4-6 (45.3%) nights or 1-3 nights (36.5%) in TNQ (2009)

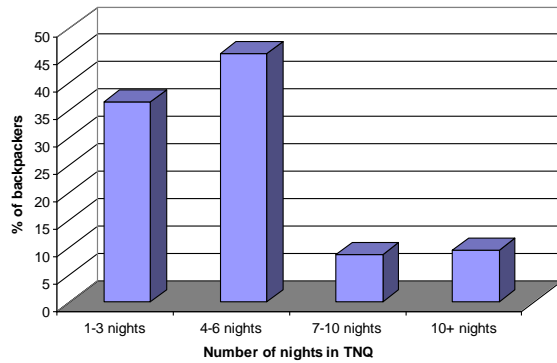


Fig 3: Length of stay in TNQ

The most common activities they participated in:

1. A walk
2. Viewing wildlife
3. A guided tour
4. Viewing scenery
5. Photography

What airlines do they use?

- Most backpackers leaving Cairns Airport reported they were using Qantas (60.4%), followed by Jetstar (18.8%) and Virgin Blue (18.8%) (Jun-Dec 2009)

The major activities participated in while visiting the GBR:

1. Snorkeling
2. Swimming
3. Viewing corals
4. Viewing marine wildlife
5. Certified scuba diving

What are their travel patterns?

- Peak departure times were February (12.4%), April-May (26.3%), July-August (22.1%) and November (13.9%)

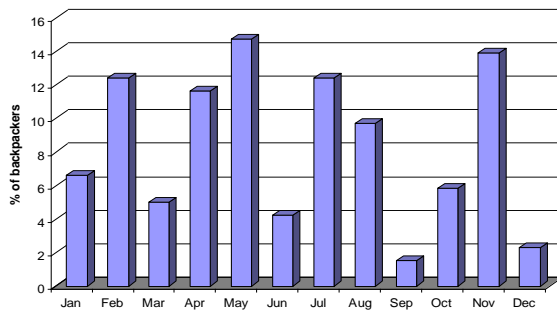


Fig 4: Annual Months of Departure

The most popular rainforest locations:

1. Kuranda
2. The Daintree
3. Cape Tribulation
4. Mission Beach
5. The lakes area

Repeat visitors

- 14% of backpackers who visited TNQ are repeat visitors. 13.1% of all backpackers had previously visited the GBR.



What are the backpackers' top fives?

The most important reasons for visiting TNQ:

1. Great Barrier Reef
2. See Australian wildlife
3. Visit the rainforest
4. Experience natural environment
5. Climate and also to experience Aboriginal culture

Satisfaction with service levels

Table 1 outlines backpacker's opinions about the region's service quality

Table 1: Backpackers' satisfaction with service in TNQ

Service	Overall mean Satisfaction
Tours were on time	4.27
Felt safe and secure moving around	4.25
Friendly accommodation staff	4.17
Tour guides were informative	4.15
Tour service standards	4.05
Tours gave value for money	3.99
Accommodation value for money	3.96
Accommodation service standard	3.94
Attractions offered value for money	3.91
Visitor information was accessible	3.91
Restaurant staff were efficient	3.81
Visitor information was accurate	3.80
Restaurant menus were good	3.69
Shopping was good	3.59
Public transport was accessible	3.54

On-time public transport	3.54
Restaurant value for money	3.51
Variety of shops	3.50
Shop closing times	3.38

Recommend TNQ to other visitors

- Almost all backpackers (98.2%) who visited TNQ mentioned that they would recommend visiting this region to others

Satisfaction with visit to TNQ

- Backpackers (mean = 8.57 out of 10) were generally very satisfied with their visit to TNQ

Limitations

The survey was only undertaken in English at Cairns airport. Backpackers departing by coach or car were not included and this omission may skew some results. Data on non English speaking backpackers may also skew aspects of the data. Caution should therefore be exercised when generalizing the data.

Further Information

Readers should visit the following website for more results:

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

Marine and Tropical Sciences Research Facility



“New Zealand visitor behaviour in Tropical North Queensland”

TNQ Tourism Factsheet 5: 2010

What did we do?

The data presented in this factsheet draws on 142 domestic and international visitor surveys collected over a 3 year (2007-2009) period at departure lounge of the Cairns Domestic Airport

Who are they?

- Female (52.2%), Male (47.8%)
- Over half (53.5%)% of these visitors are aged 50 and over and only 10% were aged between 20-29 years. 14.3% were in the 40-49 age group

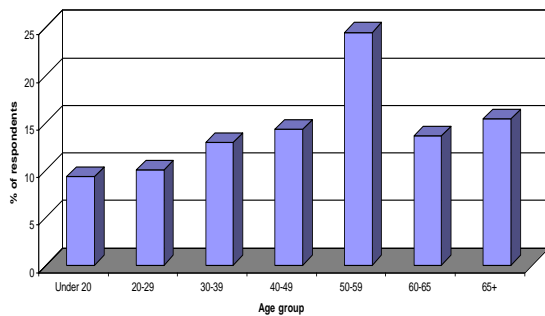


Fig 1: Age of respondents

- Most New Zealand visitors were either professional (22.1%), retired/semi-retired (20.0%) or self-employed (18.6%).
- Over half (50.4%) of this market travelled as a couple. 17.7% travelled in a family group and 11.3% mentioned they travelled alone

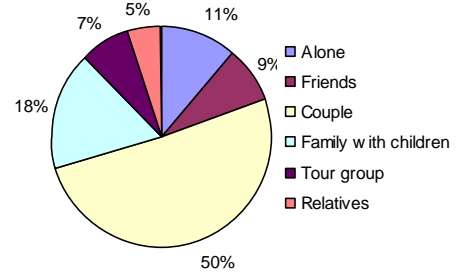


Fig 2: Travel Party Description

What do we know?

- The majority of New Zealanders preferred using the internet (24.6%) as a source of information to visit TNQ. Having visited before was equally important (24.6%) followed by travel agents (19.7%), the use of a guide book (12.7%), friends and relatives (9.9%) and also TV documentaries (4.2%)
- The overall budget (including flights, accommodation and tours) was \$6,211 for New Zealand visitors
- Main transport used to visit TNQ was mostly air (54.0%) followed by rented car (21.6%), bus or coach (10.8%) and then by private vehicle (19.5%)
- These international visitors spent on average 10.37 nights in TNQ

What accommodation did they use?

- Over one third chose to stay in holiday units/apartments (35%), 22.9% in a resort and 18.0% in a hotel or motel

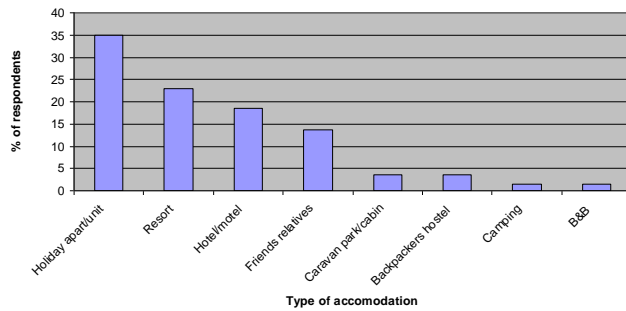


Fig 3: Length of stay in TNQ

What level of education do they have?

- Almost one third (30.8%) were educated to secondary level, 24.2% had a diploma, 22.5% a degree and 17.5% TAFE/trade.

Repeat visitors

- Almost half (45.1%) of all New Zealand visitors to TNQ mentioned that they had been before

What are these visitors' top fives?

The most important reasons for visiting TNQ

1. Rest and relax
2. Climate
3. Experience natural environment
4. Visit the GBR
5. See Australian wildlife

The most common activities participated in

1. A walk
2. Viewing scenery
3. Viewing wildlife
4. Rest and relax
5. Photography

The most visited rainforest locations:

1. Kuranda
2. Daintree
3. Mossmand Gorge
5. Cape Tribulation
5. Atherton

The most important activities while visiting the GBR

1. Snorkelling
2. Swimming
3. Viewing marine life
4. Viewing corals
5. Sailing

Satisfaction with service levels

Table 1: New Zealand visitors' satisfaction with service in TNQ

Service	Overall mean Satisfaction
Felt safe/secure moving around	4.38
Friendly accommodation staff	4.17
Tours were on time	4.14
Tour guides were informative	4.13
Visitor information was accessible	4.06
Tour service standards	4.06
Accommodation- value for money	3.99
Visitor information was accurate	3.97
Accommodation service standard	3.93
Tours value for money	3.89
Attractions were value for money	3.88
Restaurant staff were efficient	3.86
Restaurant menu selections	3.83
Shopping was good	3.62
Variety of shopping	3.62
Shop closing times	3.61
Restaurants were value for money	3.54
On-time public transport	3.54
Public transport was accessible	3.51

Satisfaction with TNQ

- On a scale of 1 (“not satisfactory”) to 10 (very satisfied”) Respondents from New Zealand rated this area highly with a mean score of 8.45

Limitations

The survey was only undertaken in English at Cairns airport. Visitors departing by coach or car were not included and this omission may skew some results. Data on non English speaking visitors may also skew aspects of the data. Caution should therefore be exercised when generalizing the data.

Further Information

Readers should visit the following website for more results:

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

5. Conclusion and future research

This report is the final in the MTSRF project. The research has aimed to show previously unreported elements of the region's visitor market and present the findings as barometers, annual reports and fact sheets. The value of research of this nature is maximised when it is taken over a long time frame allowing trends to be detected and specific issues monitored.

Project 4.9.2 has achieved its objectives identified at the commencement of the project. These were:

- to understand the socio-demographic characteristics of visitors to TNQ
- to understand motivations of visitors to TNQ
- to identify travel and activity patterns
- to identify visitors who did not visit the reef or the rainforest
- to identify aspects of environmental concern
- to measure satisfaction of respondents' visit to TNQ,
- to identify deficiencies in the region's service quality

5.1 Future research

This report is based on data which is still capable of yielding an enormous amount of information but will quickly date if further surveying is not undertaken. The following list indicates areas require more attention.

- Additional fact sheets
- A more detailed investigation into visitor satisfaction
- Visitors' views on the destination's image and the standard of various amenities
- More detailed information on information sources
- Investigation into motivations not included in this survey
- Investigation of visitors' environmental behaviours

6. References

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7. Publication List

Quarterly 'Tourism Barometers'

2007, 2008, 2009 Rainforest Tourism Barometers – Quarters 1, 2, 3 and 4

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

Survey Fact Sheets

Sibtain, J. (2010) *New Zealand visitor behaviour in Tropical North Queensland (2007-2009)*

Sibtain, J. (2010) *Backpacker behaviour in Tropical North Queensland(2007-2009)*

Available for download: 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)

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McNamara, KE and Prideaux, B. (2011) Experiencing 'Natural' Heritage, *Current Issues in Tourism*, 14: 47-55.

Carmody, J. and Prideaux, B. (2011) Enhancing the role of host communities in the management of protected areas through effective two-way communications: A case study, *Asia Pacific Journal of Tourism Research*, 16: 89-104.

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- McNamara, KE and Prideaux, B (2009) 'One with 'nature'? Visitor knowledge, attitudes and behaviours in the rainforest, *Marine and Tropical Sciences Research Facility Conference*, Townsville.
- McNamara, KE and Prideaux, B (2008) 'The who, how and what of rainforest tourism in Australia's World Heritage Wet Tropics', *Asia Pacific Tourism Association Conference*, Bangkok.
- McNamara, KE and Prideaux, B (2008) 'Just a pretty bunch of trees? Rainforest tourism in the Wet Tropics World Heritage area', *Marine and Tropical Sciences Research Facility Conference*, Cairns.
- McNamara, KE, Coghlan, A and Prideaux, B (2008) 'The non nature-based tourists in the tropical north', *Asia Pacific Tourism Association Conference*, Bangkok.

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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>

8. Appendix A

PLEASE MARK YOUR RESPONSES LIKE THIS → ●

1. Are you: Male Female

2. Where do you usually live? Australia (postcode) _____ Overseas (country)

3. Please indicate the year you were born: _____

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

- | | | | |
|--|---------------------------------------|--------------------------------------|---|
| <input type="radio"/> Self-employed | <input type="radio"/> Professional | <input type="radio"/> Retail | <input type="radio"/> Domestic duties |
| <input type="radio"/> Management | <input type="radio"/> Office/Clerical | <input type="radio"/> Public Service | <input type="radio"/> Manual/Factory worker |
| <input type="radio"/> Service Industry | <input type="radio"/> Tradesperson | <input type="radio"/> Student | <input type="radio"/> Retired |

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

- | | | | |
|-------------------------------|---|----------------------------------|----------------------------|
| <input type="radio"/> Alone | <input type="radio"/> Couple (partner/spouse) | <input type="radio"/> Tour group | <input type="radio"/> Club |
| <input type="radio"/> Friends | <input type="radio"/> Family with children | <input type="radio"/> Relatives | |

6. Was this your first visit to Tropical North Queensland (TNQ)?

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

7. How many nights in total will you be away from home? _____

8. How many nights did you spend in Tropical North Queensland (TNQ)? _____

9. What was your main type of accommodation during your visit to Tropical North Queensland (TNQ)?

- | | | | |
|--|-------------------------------|--|--|
| <input type="radio"/> Hotel/motel | <input type="radio"/> Resort | <input type="radio"/> Backpackers hostel | <input type="radio"/> Holiday apartment/unit |
| <input type="radio"/> Caravan park/cabin | <input type="radio"/> Camping | <input type="radio"/> Bed & breakfast | <input type="radio"/> Friends/relatives |

10. What was your main type of transportation to TNQ?

- | | | | |
|---------------------------------|---------------------------------------|-----------------------------------|--|
| <input type="radio"/> Air | <input type="radio"/> Private vehicle | <input type="radio"/> Rented car | <input type="radio"/> Rented campervan/caravan |
| <input type="radio"/> Bus/coach | <input type="radio"/> Rail | <input type="radio"/> Cruise boat | <input type="radio"/> Other _____ |

11. Where did you find out about TNQ? (Please select all that apply)

- | | | | |
|------------------------------------|---|---------------------------------------|--|
| <input type="radio"/> Internet | <input type="radio"/> Tourist guide books | <input type="radio"/> Friends/family | <input type="radio"/> Advertisements in print |
| <input type="radio"/> Travel Agent | <input type="radio"/> TV documentary | <input type="radio"/> Visitor centres | <input type="radio"/> Advertisements on TV/radio |
| <input type="radio"/> Been before | <input type="radio"/> Other _____ | | |

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

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

1) _____ 2) _____ 3) _____

14. Please indicate the highest level of **formal education** that you have received so far:

- Secondary Trade/TAFE Diploma Degree Other _____

15. Thinking about this trip to TNQ, what was the **overall budget** for your travel party? (including airfares, accommodation, tours, and all other expenses)

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

16. Please indicate if you have **participated** in any of the following **environmental practices** in the past 12 months:

- Worked in the environmental field Reduced waste and water consumption at home Considered environmental issues when voting Reduced energy consumption at home
- Modified your home surrounds to include native plants Encouraged someone else to change a practice that harms the environment Attended training in environmental management Participated in local environmental issues

17. Please indicate **how important** each of the features were **in your decision to visit TNQ**:

	<i>Not at all Important</i>	<i>Unimportant</i>	<i>Neutral</i>	<i>Important</i>	<i>Very Important</i>
Visit the Great Barrier Reef	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit the Wet Tropics 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 and relax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snorkelling and 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"/>

Taste tropical fruits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit friends and 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"/>
Walk in the rainforest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit a World Heritage area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participate in the nightlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To 'party'	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. If you used a vehicle during your trip to TNQ, please indicate the location(s) that you have visited:

- Kuranda Mareeba Atherton Malanda Millaa Millaa
 Mission Beach Port Douglas Innisfail Yungaburra Ravenshoe
 Cape Tribulation Daintree Cooktown Undara

19. Did you visit the Wet Tropics rainforest during this trip to TNQ?

Yes

Was this your first visit to the Wet Tropics rainforest? Yes No

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

Where did you go?

- Kuranda Atherton Tablelands Cape Tribulation Daintree
 Mossman Gorge Innisfail region Mission Beach region Paluma
 Lakes area Waterfalls circuit Misty Mountains Other _____

Which of the following activities did you participate in?

- Hiking Walking Film/Photography Bird watching
 Viewing scenery Viewing wildlife Visiting information centres Reading site interpretation
 Socialisation General relaxation Bike riding Swimming
 4WD Guided tour Camping Rafting

No

Why not? (Choose as many as apply)

- Not enough time Not interested Too expensive No available information
 Activities not available The rainforest is too damaged Bad weather Not enough walking tracks
 I have been before No tours where I wanted to go Other _____

20. Have you visited other Tropical Rainforests overseas?

Yes

No

If *Yes*, please indicate where you have visited, and also tell us how satisfied you

were with the condition of the natural environment,
ie. the environment was well-managed.

Where?	<i>Very unsatisfied</i>	<i>Fairly unsatisfied</i>	<i>Neutral</i>	<i>Fairly satisfied</i>	<i>Highly satisfied</i>
_____	<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"/>
_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Did you visit the Great Barrier Reef during this trip to TNQ?

Yes

Was this your first visit to the Great Barrier Reef? Yes No If No, how many times have you visited? _____

Where did you depart from?

- Cooktown Port Douglas Cairns Mission Beach
- Townsville Airlie Beach Mackay Other _____

Which of the following activities did you participate in?

- Swimming Helicopter flight Certified scuba diving Resort/uncertified scuba diving
- Snorkelling Visiting the islands Overnight cruise Glass bottom boat/semi-sub coral viewing
- Sailing Marine biologist tour Diver training course Viewing marine animals

No

Why not? (Choose as many as apply)

- Not enough time I get seasick I have been before Not interested
- Too expensive The reef is too damaged Unconfident swimmer Don't like diving/snorkelling
- Bad weather Travel party didn't want to Other _____

22. Have you visited any of the following reefs?

- Caribbean Hawaii Indian Ocean South Pacific
- South East Asia Micronesia Red Sea Ningaloo

23. How do the other reefs that you have visited compare with the Great Barrier Reef?

	<i>Better</i>	<i>Same</i>	<i>Worse</i>		<i>Better</i>	<i>Same</i>	<i>Worse</i>
South East Asia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Red Sea	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
South Pacific	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Hawaii	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Indian Ocean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Micronesia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Caribbean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ningaloo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. Please tell us the last place you visited before coming to TNQ?

25. Please tell us where you will go after leaving TNQ?

26. If you are an international visitor, which city did you arrive in Australia? _____

27. Which airline are you using today?

- Qantas Jet star Virgin Blue Other _____

28. Do you normally use this airline for holiday transport? Yes No Sometimes

29. When booking your trip, did you book anything through a travel agent? Yes No If Yes, What?

30. Did you use on-line facilities to look for information on Cairns? Yes No

31. Did you book any of the following on-line?

- Accommodation Airline Rental car Tours Other _____

32. Did you take out travel insurance? Yes No

33. Would you recommend visiting TNQ to prospective visitors?

- Yes No Not to everybody, for example _____

34. Please reflect on your level of satisfaction with the following aspects of your visit to TNQ:

	<i>Very unsatisfied</i>	<i>Fairly unsatisfied</i>	<i>Neutral</i>	<i>Fairly satisfied</i>	<i>Highly satisfied</i>
Friendly accommodation staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accommodation value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accommodation service standard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tour guides were informative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tours gave value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tour service standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tours were on-time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attractions offered value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurant staff were efficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Restaurant value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurant menu selections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping was good	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variety of shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shop closing times	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public transport was accessible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-time public transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor information was accurate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor information was accessible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Felt safe and secure moving around	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. On the scale below, how would you rate the overall quality of your visit to the TNQ region?

Highly satisfactory 1 2 3 4 5 6 7 8 9 10 *Not* *satisfactory*

Many thanks for your time in completing this survey.