

Section 1: Visitor Perceptions of TC Larry

What did we do?

An on-site survey collected information from a sample of 276 visitors to the cyclone affected regions of Mission Beach, Tully, and the Atherton Tablelands.

Who are they?

- 53.5% females, 46.5% males
- Mostly 20-29 yrs (21%), even spread of 30-60 yrs
- Occupation: 25% semi/retired, 22% professionals, 13% students, 9% self-employed
- 68% domestic visitors – major markets Victoria (23.5%), other QLD (15%), and NSW/ACT (14%)
- 32% international visitors – from UK (14%), USA/Canada (6%), and Europe (7%)

What do we know about their travel plans?

- Half were repeat visitors to region, 90% of these were domestic visitors
- Mainly travelled as couples (46%), with family (23%), with friends (16.5%), or alone (10%)
- 54 % planned to stay 4-14 days in TNQ, with 35% planning to stay longer
- Most visitors stayed in caravan park/cabin (36.5%), backpacker hostels (17%), and holiday units (13%)
- Mainly travelled to TNQ by private/rented vehicle (53%), and fly/drive (25.5%)
- Trip planning varied: 30% planned day-to-day, 25% organized itinerary before trip, 24% did some planning before

Where do they get information?

- Most popular sources were tourist guide books (31%), friends/family (24%), VICs (18%), and the Internet (15.5%)
- 15% used info obtained on-site

What are their motivations?

The following were rated important to very important for visiting the region (by mean ranking):

- | | |
|----------------------------------|------|
| • Rest and relax | 1.68 |
| • Climate | 1.74 |
| • Visit the rainforest | 1.83 |
| • Experience natural environment | 1.89 |
| • Visit islands and beaches | 2.00 |
| • See Australian wildlife | 2.10 |
| • Visit GBR | 2.17 |

What were the impacts of TC Larry?

- Only 15.5% of visitors indicated TC Larry influenced their itinerary
- Visitors said TC Larry's impact on tourism had:
 - No impact 27.5%
 - A little 55.0%
 - Very much 17.5%
- Visitors perceived the main impacts on (frequency):
 - Natural landscape 147
 - Accom/F&B 93
 - Infrastructure/Facilities 71
 - Access 62
 - People 61
 - Attractions 54
- Visitors perceived the rainforest had:
 - No visible damage 5.0%
 - Little visible damage 16.5%
 - Some visible damage 78.5%

Were they satisfied?

- Overall, visitors were very satisfied (47%) and satisfied (49.5%) with their TNQ holiday
- 58% said TC Larry had *no impact*, and 33.5% *very little impact* on their satisfaction (Figure 1)
- Only 8.5% indicated TC Larry had a *great impact*
- 53 respondents said TC Larry had not influenced their holiday satisfaction, while 59 said that weather and rainforest damage had influenced their satisfaction
- 90% said they would recommend TNQ
- 71% said they would visit the region if there were no rainforests in TNQ

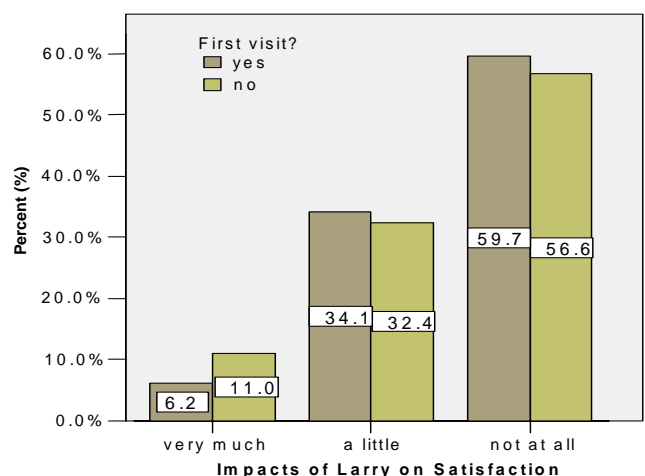


Figure 1: Impacts of TC Larry on Satisfaction by Visitation

Section 2: Perceptions of TC Larry in Major Source Markets

What did we do?

An off-site survey conducted in Sydney and Brisbane collected information from potential visitors to TNQ, resulting in 397 valid surveys across the two sites.

Who are they?

- 54.5% females, 45.5% males
- 24% were aged 40-49 yrs, with 12% over 60 yrs
- 16% self-employed, 13.5% professionals, 13.5% semi/retired, 13% students
- Over one third (38.5%) were living with a spouse/partner and kids, 25.5% were with a partner and no kids
- Majority were from Brisbane (48%) or Sydney/NSW areas (42.5%)

Have they visited the region before?

- Overall, 67% had visited TNQ in the past – 73% Brisbane, 60% Sydney
- Majority of visits were in the last 5 years
- On average, Sydney respondents had visited more recently (4.5 years ago) than Brisbane respondents (7.5 yrs ago)
- 73% had considered TNQ as a destination in planning holidays
- 99% still consider TNQ a holiday destination after TC Larry
- When considering a future visit, there was an almost even split across less than a year, in the next year, and the indefinite future (Figure 2)

What will attract them to TNQ?

Despite the impacts of TC Larry, the features that might attract visitors included:

- | | |
|-------------------------------------|-------|
| • Coastal and marine environment | 43.5% |
| • Weather | 23.5% |
| • Terrestrial environment/Landscape | 18.5% |
| • Tropical lifestyle/Atmosphere | 12.0% |

Were they aware of TC Larry?

- Over 90% had heard of TC Larry
- 23 of the 25 who were not aware resided in Sydney
- TV news broadcasts were a major source of information (83%), followed by newspapers (33%), radio (31%), and WOM from friends/relatives in TNQ (10%)

Where they aware of TTNQ's promotional campaign?

- Over 60% were not aware of the promotion
- Of the 38% who did, most had been encouraged to consider TNQ as a holiday destination
- Sydney was less aware than Brisbane, and were therefore less likely to be encouraged to visit TNQ as a result of the campaign

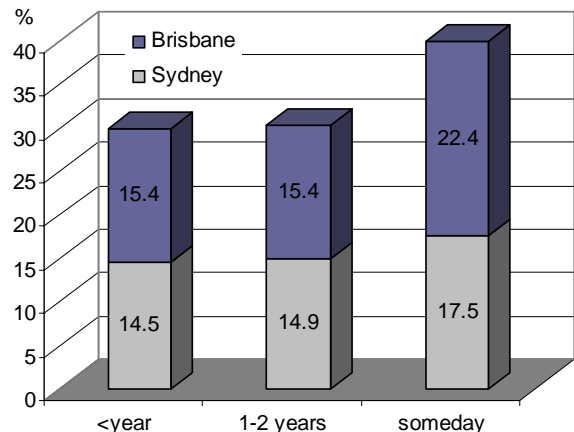


Figure 2: Future Visitation to TNQ - Brisbane and Sydney

How do I find out more?

For a copy of the report, contact:
 Michelle Thompson
 James Cook University
 Email: michelle.thompson@jcu.edu.au
 Phone: (07) 4042 1371
 Fax: (07) 4042 1474

In 2007, phase two will investigate the long term impact of TC Larry in the study region and southern markets.

Copyright © Bruce Prideaux 2006

All rights reserved. Apart from fair dealing for the purposes of study, research, criticism or review as permitted under the Copyright Act, no part of this book may be reproduced by any process without written permission from the publisher.