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**Queensland Parks and Wildlife Service
Community Survey 2012
Executive Summary**

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Prepared for
Queensland Parks and Wildlife Service
Department of National Parks, Recreation, Sport and
Racing

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Note: This Executive Summary is one section of the Main Report. The Main Report is part one of a two volume Newspan report, part two is called:

QPWS Community Survey 2012 Part 2 Appendices Quarter 1–4, 2011–2012.



1. EXECUTIVE SUMMARY

1.1 Objectives

The primary objectives of the research were to determine the community visitation to parks across Queensland. Specific objectives included:

- To obtain estimates and confidence limits of visits to Queensland Parks and Wildlife Service (QPWS) managed parks including terrestrial and marine parks (including frequency of visit and total visits).
- To determine the main reason and range of activities undertaken during visits to parks.
- To estimate the proportion of visitors participating in different activities during their visit to parks.
- To compare visits and participation in activities by different demographic groups.
- To estimate level of satisfaction with the most recent visit to a park.
- To collect information on visitor participation in specific activities on the South East Queensland (SEQ) Horse Trail Network, and attitudes to other park users i.e. horseriders, mountain-bike riding, trail-bike riding and four-wheel driving.
- To compare the findings from the Nielsen Research 1999, 2003 & 2007 repeat QPWS community survey questions to the findings from the 2011–12 survey, and identify any statistically significant changes over time.

1.2 Background

Queensland Parks and Wildlife Service (QPWS) commissioned Newspoll, in June 2011 to conduct a 12 month community survey to determine domestic visitation of national parks, marine parks and other QPWS managed areas across Queensland. The survey included parks visited, frequency, participation in popular activities and satisfaction with the most recent visit.



Newspoll was also commissioned to develop an estimate of annual international visits to QPWS managed areas based on the International Visitor Survey (IVS)¹.

This survey also received additional funding from the Ecological Sciences division of the Queensland Department of Science, Information Technology, Innovation and the Arts (DSITIA) as part of the Horse Trail Network monitoring program to include additional questions for Queensland residents on community attitudes to horseriding, mountain-bike riding, four-wheel driving and trail-bike riding activities in national parks.

1.3 Methodology

The research was conducted using Newspoll's National Telephone Omnibus. This is a weekly telephone survey of 1200 adults (aged 18+) that gathers responses from metropolitan, regional and rural participants. This report provides QPWS with a summary of the full twelve months of data gathering from July 2011 to June 2012. The total number of interviews conducted was n=5822 among respondents from Queensland, New South Wales (NSW) and Victoria.

The sample was post-weighted to reflect the latest Australian Bureau of Statistics population estimates. Annual visitation estimates were derived by multiplying the number of claimed visits in a four week period for adults and children x 13 [as there are 13 four week periods in a year].

NOTE – caution should be used when interpreting some of these data sets as some figures have a low confidence level.

¹ The International Visitor Survey represents the most comprehensive source of information on international visitors to Australia.

The International Visitor Survey contains over 70 questions supported by 'show-cards' that are used to help the respondent answer particular sections. The interviewer asks the respondent for factual details, among other things, about number of nights in Australia; travel arrangements; reasons for visiting; places visited; information sources about Australia prior to leaving home country; impressions of aspects of Australia; income earned and expenditure on the trip.

The International Visitor Survey samples 40,000 departing, short-term international travellers over the age of 15 years who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports; Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

Reference: Australian Government, Department of Resources, Energy and Tourism <www.ret.gov.au>

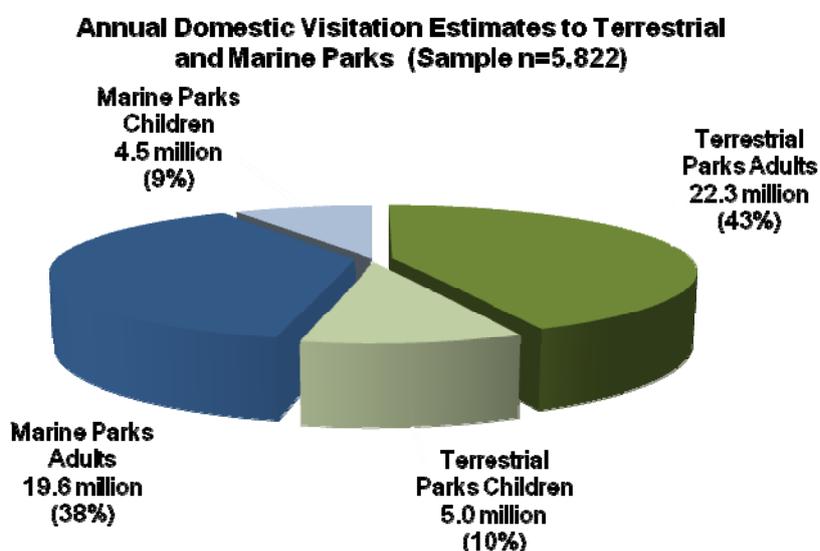


1.4 Key findings

1.4.1 Domestic visitation

The total number of adult and children visits to all QPWS managed areas was: 51.4 million¹. Children represented 19% of this figure. Terrestrial park visitation numbers were 27.3 million (53% of all park visits). Children represented 18% of all terrestrial park visits. Marine park visitation numbers were 24 million (47% of all park visits). Children represented 19% of all marine park visits. See summary table and chart below.

Total annual domestic visit estimates to QPWS managed areas (sample n=5822)		
All QPWS managed areas	Terrestrial parks	Marine parks
51,383,000	27,343,000	24,039,000

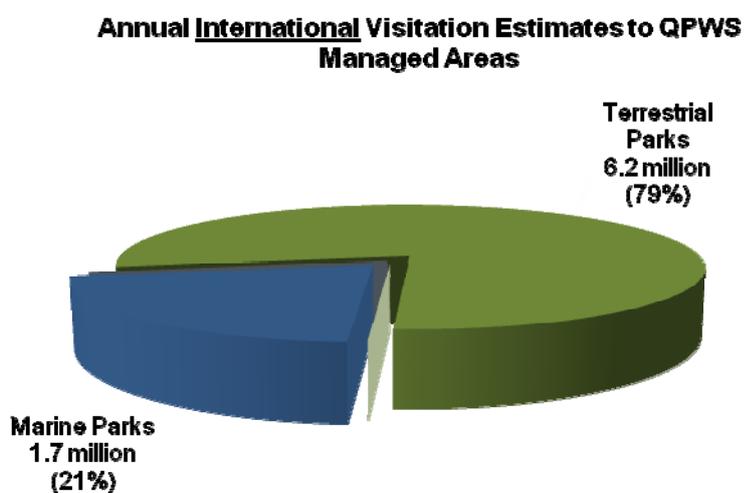


¹ This figure is based on domestic visitors only and does not include international visitors. International visits numbers have been calculated and reported separately in the main report at '4.4 Estimating international visitors to Queensland parks'. Because of the different methodologies that were used and the assumptions contained in the international visitation numbers, it was decided not to include these figures in the overall reporting.



1.4.2 International visitation

Total annual <u>international</u> visit estimates to QPWS managed areas		
All QPWS managed areas	Terrestrial parks	Marine parks
7,890,609	6,212,289	1,678,320



The total number of annual international visits to Queensland parks is 7.9 million; comprising 6.2 million terrestrial park visits and 1.7 million marine park visits. (Terrestrial park visits include national parks, state forests and QPWS managed areas.) Due to the different data collection methods used, we are unable to combine the visitation estimates of the domestic market with those of international visitors.



1.4.3 Most popular parks

Most popular QPWS terrestrial parks (domestic visitors only)	Annual estimated visits
Noosa National Park	2,041,000
Tamborine National Park	1,727,000
Burleigh Head National Park	1,219,000
Lamington National Park	1,214,000
Great Sandy National Park (Fraser Is, Cooloola and Inskip)	1,118,000
Bribie Island National Park	986,000
D'Aguilar National Park	812,000
Daintree National Park	753,000
Whitsunday Islands National Park	514,000
Daisy Hill Conservation Park	442,000
NOTE: <ul style="list-style-type: none">– International visitors are not included so some popular parks for overseas visitors, e.g. Barron Gorge, do not feature in this list.– Data in red has a sample size of n=<30 with lower confidence levels.	

Most popular Queensland marine parks (domestic visitors only)	Annual estimated visits
Moreton Bay Marine Park	12,354,000
Great Barrier Reef Marine Park (GBRMP) – all sections	8,002,000
Great Sandy Marine Park	3,685,000

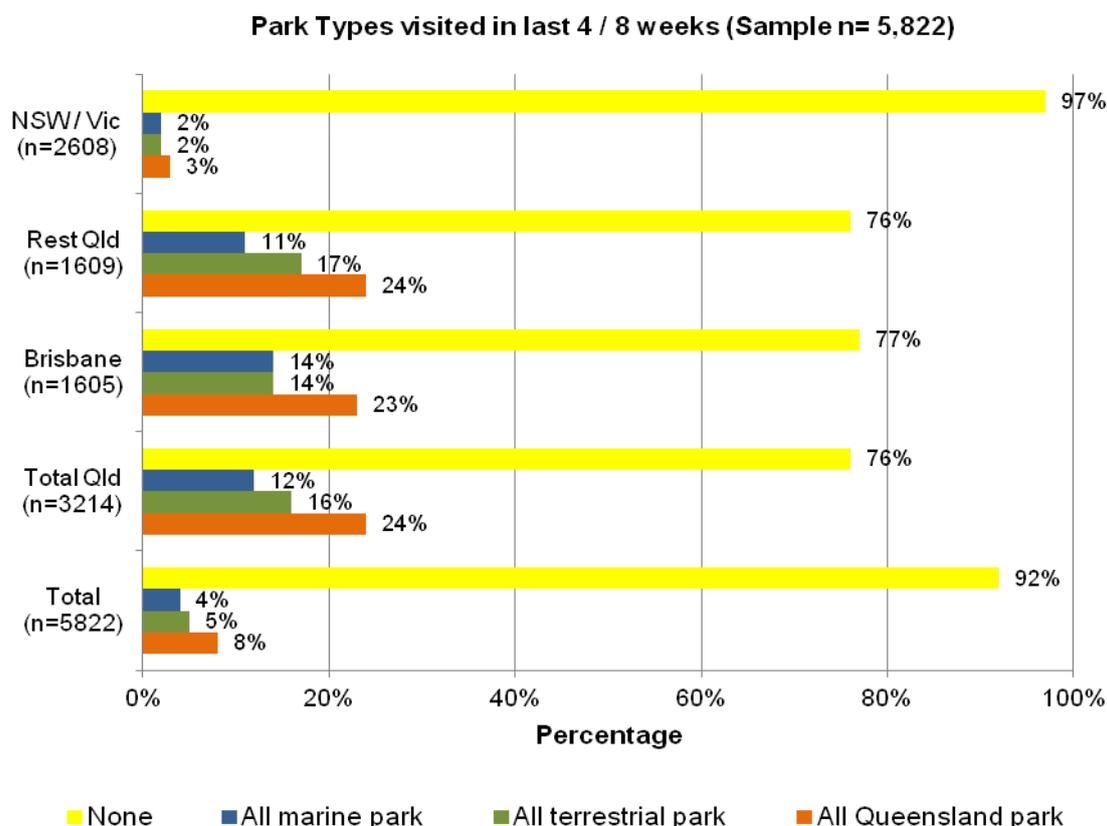


Visitation to GBRMP by QPWS management sections (domestic visitors only)	Annual estimated visits
Whitsunday section GBRMP	1,961,000
Nth Qld section GBRMP	1,514,000
Mackay section GBRMP	1,116,000
Gladstone section GBRMP	791,000
Townsville section GBRMP	771,000
Roslyn Bay section GBRMP	726,000
Cairns section GBRMP	492,000
Innisfail section GBRMP	320,000
TOTAL (all sections)	8,002,000
NOTE: – Data in red has a sample size of $n < 30$ with lower confidence levels.	



1.4.4 Park types visited in last 4/8 weeks

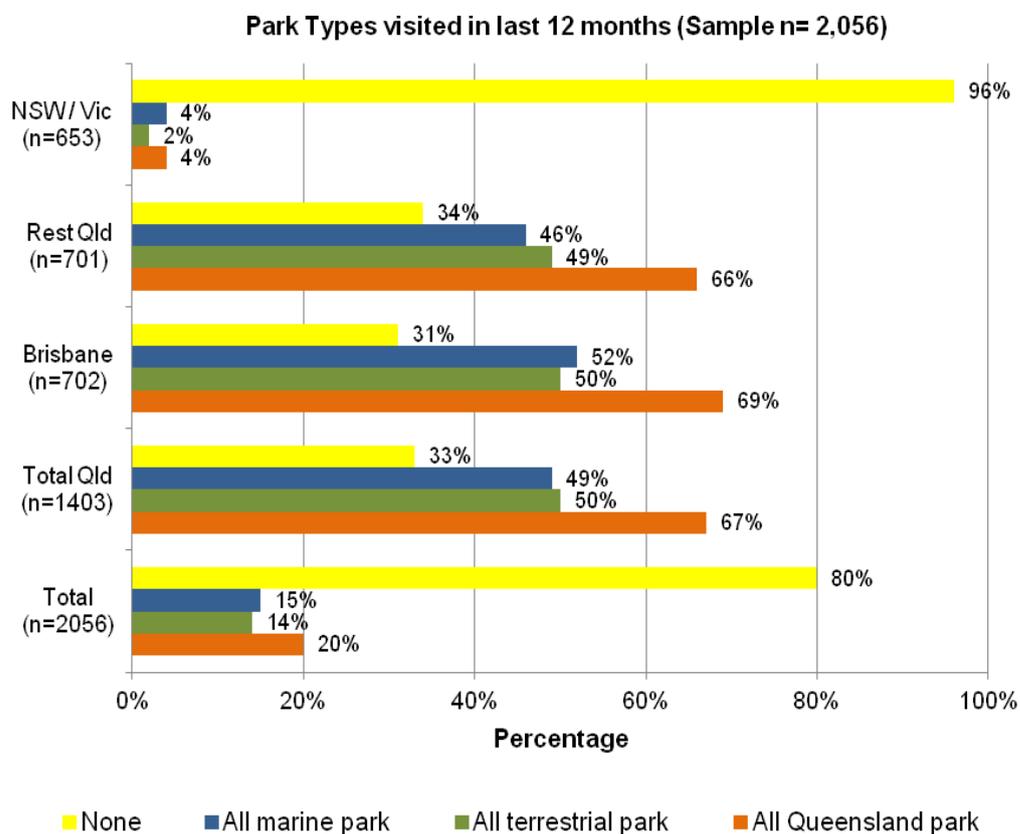
Respondents were asked when was the last time they had visited any national parks, state forests, conservation parks or recreation areas in Brisbane or the rest of Queensland, **not** including any visits to botanic gardens or council parks. Below we show the percentage who visited a Queensland park in the last 4 weeks (Queensland respondents) or last 8 weeks (NSW/Vic. sample).





1.4.5 Park types visited in last 12 months

Below we show the percentage who visited a Queensland park in the last 12 months.



Key findings:

- 24% of people surveyed in Queensland had visited a QPWS managed area (terrestrial and marine) in the last 4 weeks.
- Just 3% of people surveyed in NSW and Victoria had visited a QPWS managed area in the last 8 weeks.
- 50% of people surveyed in Queensland visited a terrestrial park in the last 12 months.
- 67% of Queenslanders had visited either a terrestrial or marine park in past 12 months.



1.4.6 State-wide visitation by park type and visitor origin

Annual state-wide visitation for all QPWS managed areas is presented in the following table showing separate number of visits for terrestrial and marine parks and the origin of visitors.

QPWS annual state-wide visitation estimates by park type and visitor origin in 2011–2012

Area type x origin of visitor		Brisbane (n=1605)	Rest of Qld (n=1609)	Total Qld (n=3214)	NSW & Vic. (n=2608)	Total visits (n=5822)
All QPWS managed areas (n=839, the sub sample of adults who actually visited a QPWS managed area)	Total	17,747,000 (±21%)	26,176,000 (±23%)	43,923,000 (±16%)	7,460,000 (±43%)	51,383,000 (±15%)
	Children	3,019,000 (27%)	5,110,000 (±40%)	8,129,000 (±27%)	1,402,000 (60%)	9,531,000 (±25%)
	Adults	14,728,000 (±20%)	21,066,000 (±19%)	35,794,000 (±14%)	6,058,000 (±40%)	41,852,000 (±13%)
Terrestrial parks (n=574, the sub sample of adults who actually visited a terrestrial park)	Total	7,797,000 (±27%)	15,662,000 (±27%)	23,459,000 (±20%)	3,884,000 (49%)	27,343,000 (±19%)
	Children	1,964,000 (±35%)	2,782,000 (47%)	4,476,000 (±32%)	565,000 *	5,041,000 (±30%)
	Adults	6,103,000 (±25%)	12,880,000 (±23%)	18,983,000 (±18%)	3,319,000 (±42%)	22,302,000 (±16%)
Marine parks (n=440, the sub sample of adults who actually visited a marine park)	Total	9,948,000 (±28%)	10,515,000 (±36%)	20,463,000 (±24%)	3,576,000 (±57%)	24,039,000 (±22%)
	Children	1,324,000 (32%)	2,328,000 (68%)	3,652,000 (45%)	837,000 (63%)	4,489,000 (±38%)
	Adults	8,624,000 (±27%)	8,187,000 (±27%)	16,811,000 (±19%)	2,739,000 (±56%)	9,550,000 (±18%)

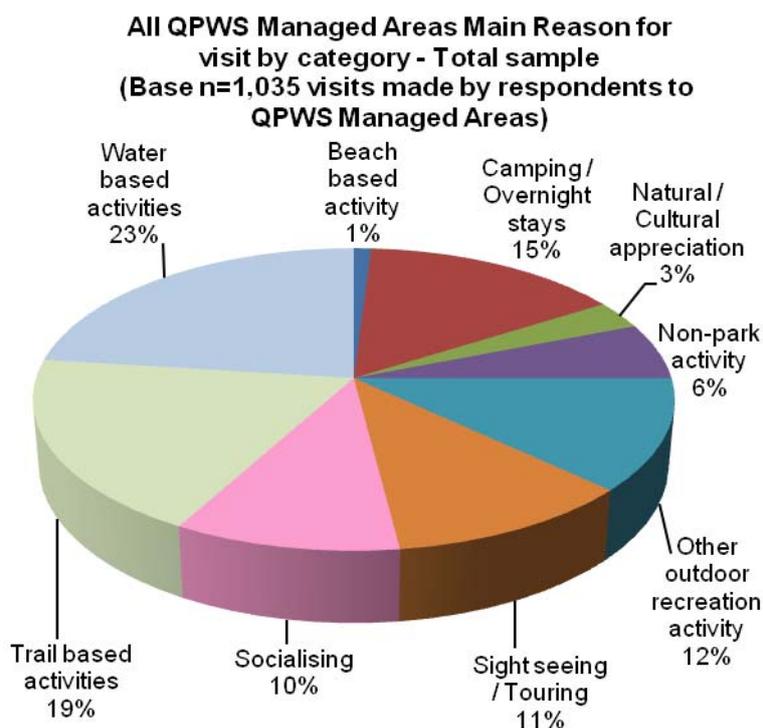
The figures in brackets (±X%) is the confidence interval associated with the data. Figures in **red**, indicate a sample base of <30 and therefore caution needs to be exercised in interpreting results. See also Section 3.5 Data Accuracy of the main report for an explanation of confidence level.

Terrestrial parks based on 574 adults visited (536 in Qld, 244 in Bris., 292 in rest Qld, 38 in NSW and Vic.). Based on 454 children visited (423 in Qld, 193 in Bris., 230 in rest Qld, 31 in NSW and Vic.). Marine parks based on 440 adults visited (404 in Qld, 218 in Bris., 186 in rest Qld, 36 in NSW and Vic.). Based on 315 children visited (285 in Qld, 136 in Bris., 149 in rest Qld, 30 in NSW and Vic.).



1.4.7 Activities

Main reason for visit by category: Respondents nominated the main activity and other activities undertaken during their last visit. These were grouped into the following nine categories. The main activities nominated by park visitors were water-based (23%), trail-based (19%) and camping/overnight stays (15%).

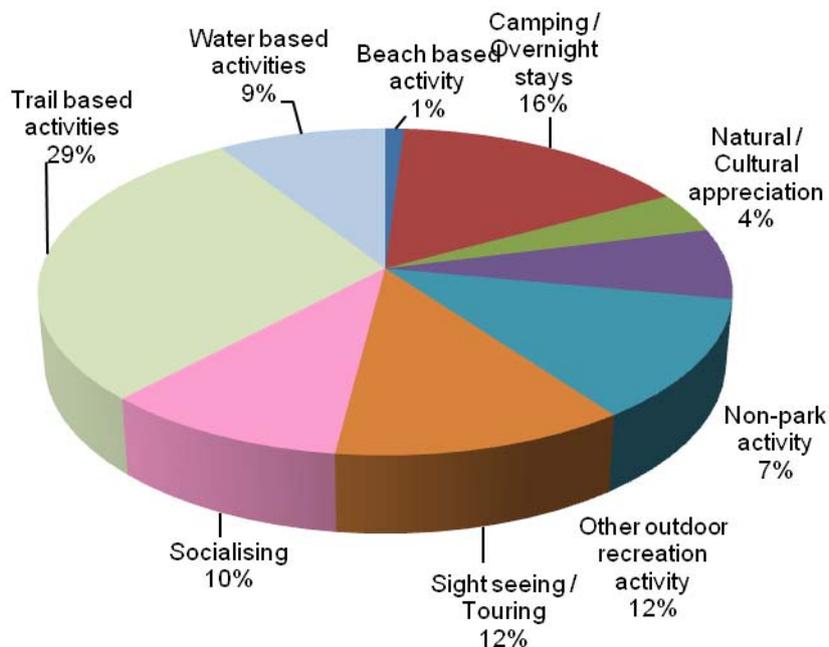


Key finding: The top three activities, accounting for over half (57%) of all activities were:

- Water-based: 23%
- Trail-based: 19%
- Camping/overnight stays: 15%



All Terrestrial Parks Main Reason for visit by category - Total sample (Base n=633 visits made by respondents to Terrestrial Parks)



Key finding: The top four activities, amongst visitors to terrestrial parks, accounting for 69% of all activities were:

- Trail-based: 29%
- Camping/overnight stays: 16%
- Sightseeing/touring and other outdoor recreation activities, each: 12%

Key finding: For terrestrial parks the main reason for visiting was bushwalking (22%), followed by scenic driving/sightseeing (10%) and holiday/weekend trip (9%)

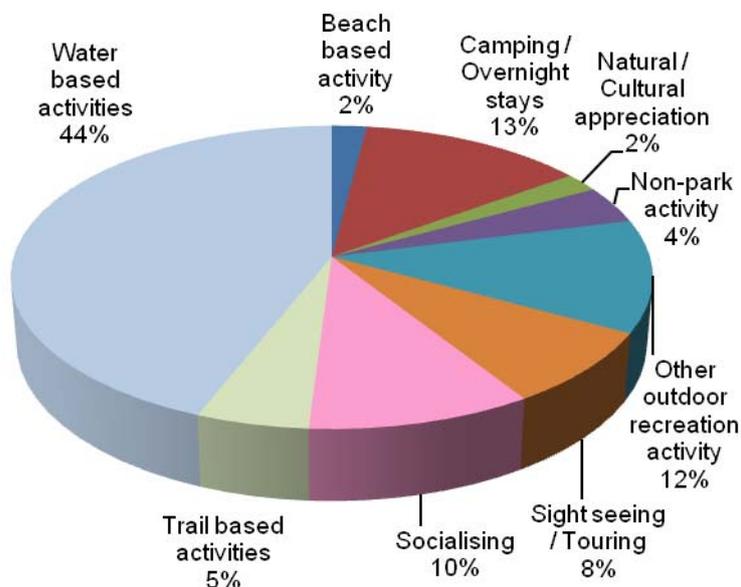


Verbatim quotes from respondents regarding their reasons for national park visits:

- 'Because of fun and recreation and bushwalking, visit the beach, go for walks and see wildlife, had lunch' (Daintree National Park)
- 'To see the trees for recreation. Visited with my family to explore. Just walked around, did nothing really took photos' (Eungella National Park)
- 'Went for a run 8 times last month' (Burleigh Heads National Park)
- 'For fun, we just did the bush walk with the little fella and took photos' (Tamborine National Park)
- 'A picnic, bushwalk and surfing' (Noosa National Park)
- 'Just a pleasure walk, observing nature, really just for exercise, it's just a rainforest walk' (Kuranda National Park)



All Marine Parks Main Reason for visit by category -Total sample (Base n=394 visits made by respondents to Marine Parks)



Key finding: The top three activities, amongst visitors to marine parks, accounting for 69% of all activities were:

- Water-based: 44%
- Camping/overnight stays: 13%
- Other outdoor recreation activities: 12%

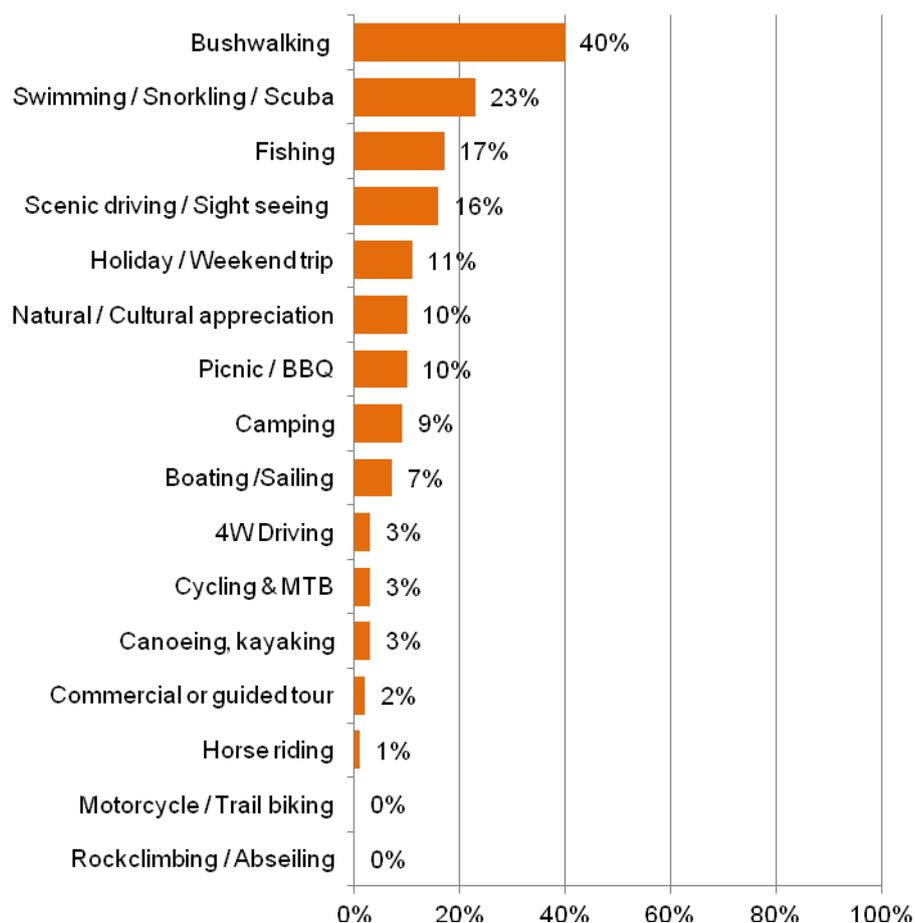
Verbatim quotes from respondents regarding their reasons for marine park visits:

- 'Camping and fishing, snorkelling' (GBRMP Keppel Bay)
- 'Recreation, sailing, tubing, swam, canoeing' (Moreton Bay MP)
- 'Holiday/driving, fishing, sightseeing, relaxing' (Great Sandy MP)



Main reason for visit by activity: Park users were asked an open-ended question about the main reason for their visit and the types of activities undertaken while in the park. The results are shown below in descending order of mention.

All QPWS Managed Areas All Activities by activity (Descending)
- Total sample (Base n=1,035 visits made by respondents to QPWS Managed Areas)



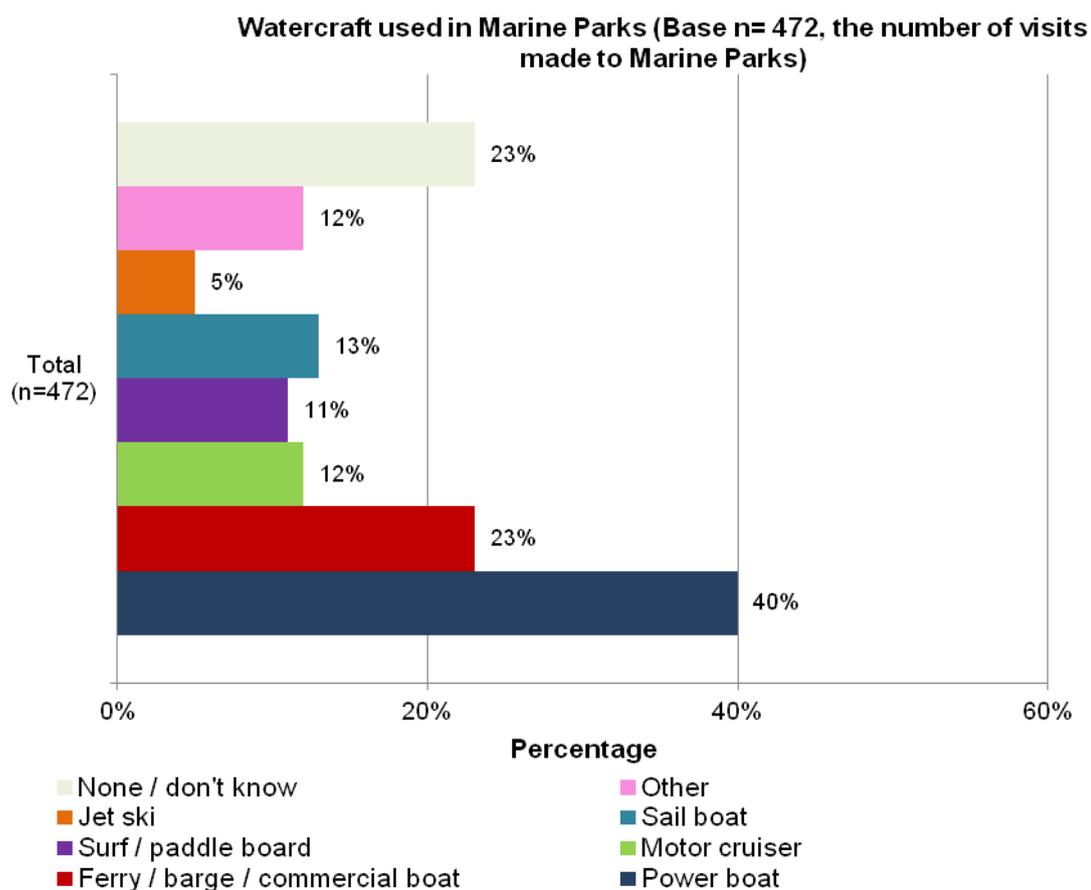
Key finding:

Bushwalking (40%), swimming/snorkelling/scuba (23%) and fishing (17%) were the most popular activities for the majority of park visits.



1.4.8 Types of watercraft used

Marine park users were read a list of types of watercraft and asked which they had used. The results appear below:



Key finding:

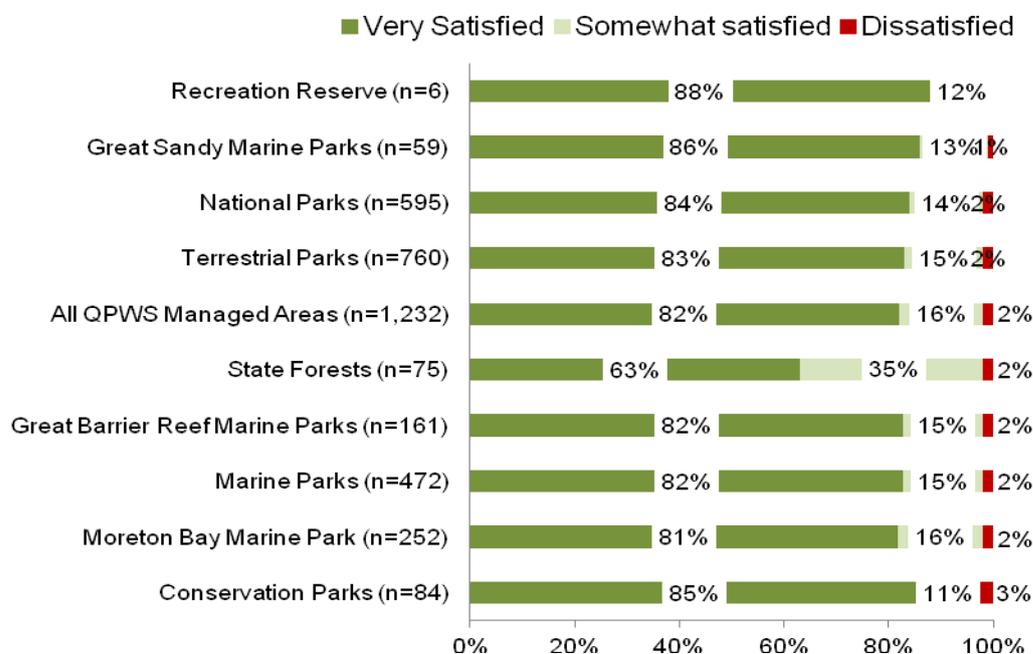
- 40% of marine park visitors used a power boat.
- Other popular watercraft included ferry/barge/commercial boat (23%), sail boat (13%), motor cruiser (12%) and surf/paddle board (11%).



1.4.9 Satisfaction

Very high levels of satisfaction exists across all QPWS managed areas: Visitors were asked to rate their satisfaction with their last visit to each individual park that they had visited. Between 63% and 88% of visitors were very satisfied, with an additional 11% to 35% somewhat satisfied. Between 1% and 6% were dissatisfied. Around four out of five visitors were very satisfied with their park visit, except for state forests where less than two out of three visitors left very satisfied ².

Proportion of visitors who were satisfied with their visit



There were no significant differences between demographic groups in satisfaction.

² The research asked only a single question about satisfaction. This has some limitations. For example, there are likely to be numerous drivers of satisfaction, each contributing in various degrees towards overall satisfaction. Additional questions along these lines would also allow for more sophisticated analysis. However, since the primary objective of the research was concerned with visitation estimates (as opposed to satisfaction), and because of budget constraints, further questions on satisfaction were not included.

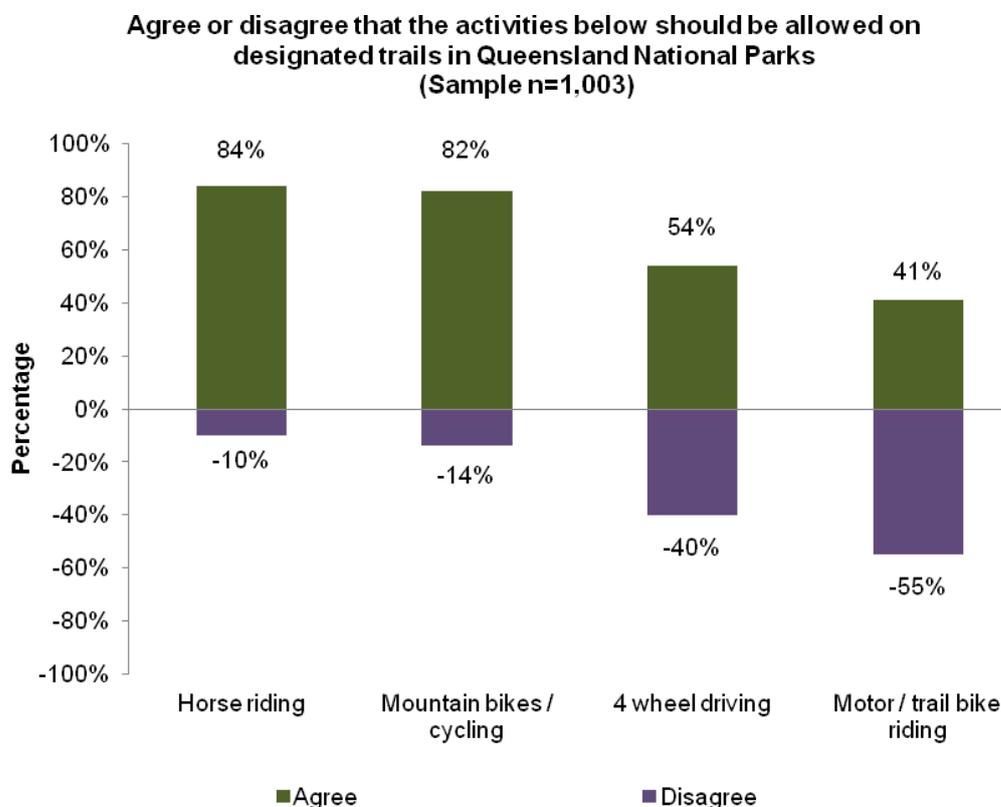


1.4.10 Community attitudes to trail-based activities

Reporting for SEQ Horse Trail Network Monitoring program.

Encounters: Queensland residents were asked a specific set of questions relating to their encounters with and attitudes towards horseriding, four-wheel driving, mountain biking and trail biking within national parks. Among the Queenslanders who were asked these questions, one in five (22%) claimed to have encountered horseriding while in a national park. Just over one third (35%) of Queenslanders had encountered trail/motor bikes in national parks. Just over forty percent had encountered mountain biking/cycling (42%) or four-wheel driving (41%) in national parks. More than one third (34%) claimed to have encountered none of these activities.

Level of support for each activity on designated trails in national parks: In the chart below the responses strongly and partly agree have been combined (shown in green as a positive) as have the responses strongly and partly disagree (shown in purple as a negative). Note that the figures do not total 100% as 'don't know/not sure' responses have not been included.





Key finding: When all four activities are compared the level of support for each activity to occur on designated trails in national parks is:

- Horseriding (84% agree)
- Mountain-bike riding/cycling (82% agree)
- Four-wheel driving (54% agree)
- Motor/trail-bike riding (41% agree)

1.4.11 Comparisons with other research

In the years 1999, 2003 and 2007 Nielsen Research undertook a study on behalf of QPWS designed to understand community perceptions and usage of national parks. A comparison shows:

Visitation: Between 39% and 45% of the Nielsen sample of previous years had visited a QPWS terrestrial park in the past year. This compares with 47% of the Newspoll sample.

Similar research studies to this one have been conducted in NSW and Victoria. Given different approaches and methodologies it is only possible to compare adult terrestrial visitation between states as shown in the table below:

Total annual domestic visitation estimates to terrestrial parks by adults		
State	Visitation estimates	Source
Qld	22,300,000	QPWS Community Survey, December 2012, Newspoll (n=5822)
NSW	27,900,000	Office of Environment & Heritage NSW, June 2010, Roy Morgan Research (n=15,643)
Vic.	45,359,000	Parks Victoria Research, 2010–2011, Newspoll (n=12,012)



Satisfaction: Based on a comparison with the Nielsen research, since 2007, the proportion of people who are very satisfied with their visit to a QPWS park appears to have increased from 61% to 82%. The total proportion who were either somewhat or very satisfied appears to have also increased from 91% to 98%.

1.5 Summary

QPWS parks are well frequented with more than 50 million domestic individual visits to terrestrial and marine parks in the 12 month period from July 2011 to June 2012.

Half of the Queenslanders surveyed had visited a QPWS managed area in the last 12 months and about a quarter had visited a QPWS managed area in the last 4 weeks.

Ten key parks attract nearly half of all domestic visits.

- The vast majority leave very satisfied with their experience (82% satisfied).
- Visitation to Queensland national parks, state forests and reserves is concentrated in 10 key parks which attract 40% of all domestic visitors.
- Two thirds of Queenslanders (67%) said they had visited either a terrestrial or marine park managed by QPWS in past 12 months.
- Nearly half (47%) of all visits to QPWS managed areas were made to a marine park.
- Fifteen per cent of all domestic visits to QPWS managed areas are made by NSW or Victorian residents.
- Three per cent of people surveyed in NSW and Victoria had visited a QPWS managed area in the last 8 weeks.