



REEF TOURISM QUARTERLY REPORT # 7 Quarter 3, Year 2 Cairns and Port Douglas July - September 2008

This quarterly report forms part of a series on reef tourism in the Great Barrier Reef (GBR) produced by James Cook University (JCU) and funded by the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF), which is administered in North Queensland by the Reef and Rainforest Research Centre. The aims and methodology of this research are presented in the introduction below. The data presented in this report summarise the results obtained during the third quarter of the project's second year (N = 398) the results from the same quarter in the first year of data collection (N = 340); and the overall results for the period between November 2006 and September 2008 (N = 3069). The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For purposes of comparison, the figures for the entire sample & the same quarter from Year 1 are provided in the text in brackets after the figures for this quarter (Quarter 3, Year 2). Blue arrows indicate changes, either increases or decreases in values, from previous quarters.



1. INTRODUCTION



The research described here falls under the MTRSF research program to identify **sustainable use and management of marine resources of the Great Barrier Reef** and specifically the **analysis of tourism use and impact on the Great Barrier Reef for managing sustainable tourism**. This program will identify annual visitor usage patterns of the GBR to enable the identification of key trends and drivers of visitor patterns. Results are presented quarterly.

the Great Barrier Reef (Port Douglas/Cairns, Townsville, the Whitsundays, and the Capricorn Coast). Results are available in an aggregate form as well as regionally, such as the report presented here. Currently, ten operators are involved in this research. A total of 601 surveys were collected in the third quarter of Year 2.

Data are collected on reef visitors' socio-demographic characteristics, and travel patterns, motivations, activities, alternative destinations considered and levels of satisfaction (including expectations and best and worst experiences).



2. METHODOLOGY



The principle methodology for this research is visitor surveys distributed through participating operators. Crew from these marine tourism operators distribute and collect the surveys at four locations across



3. LIMITATIONS



Data from the Asian market have yet to be collected. Sampling bias by crews must also be considered.



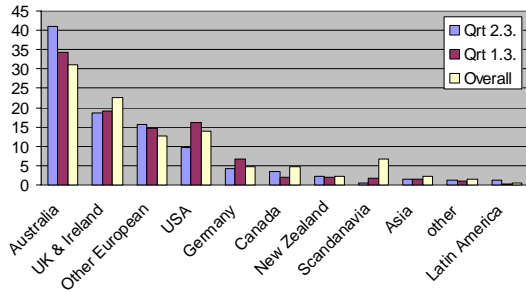
4. FINDINGS



Origin of Respondents

This quarter's sample consisted of slightly fewer men, 44.0% (46.4%;¹ 46.5%;²) than women, 56.0% (53.6%; 53.5%). Just under one half of the respondents, 41.1% (34.5%; 31.2%), were from Australia, of which 20.9% were from Queensland (Figure 1).

Figure 1: Origin of respondents.



Employment

In terms of **employment**, the most common responses were (as a percentage of the total):

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|----------------|-------------------|-------------------|---------|
| Professionals | 26.6% | 31.2% | 26.7% |
| Students | 22.1% | 14.1% | 18.7% |
| Self-employed | 8.8% | 7.9% | 8.4% |
| Management | 8.3% | 10.0% | 8.4% |
| Public service | 8.0% | 8.8% | 5.6% |

Age of Respondents

Respondents in this area of the GBR fell predominantly into the 20-29 year age bracket (Figure 2).

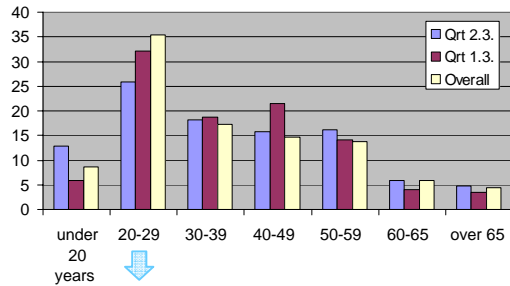


Figure 2: Age of respondents.

¹ Quarter 2, Year 1.

² Overall sample.

Travel Party

The majority of respondents were travelling as couples or with family (Figure 3).

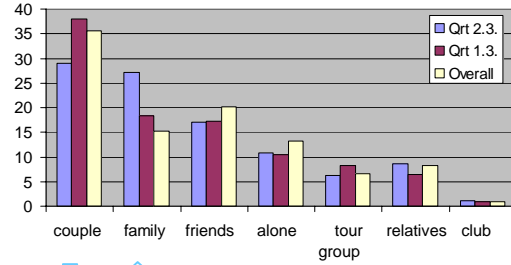


Figure 3: Respondents' travel party (%).

Previous Visits

For 77.3% (75.0%; 78.8 %) of respondents, this was their first visit to the region. The average length of stay was 3-7 (4-7; 3-7) nights.

Accommodation and Transport

Holiday apartments and air travel were the most popular accommodation (Figure 4) and transport (Figure 5) choices.

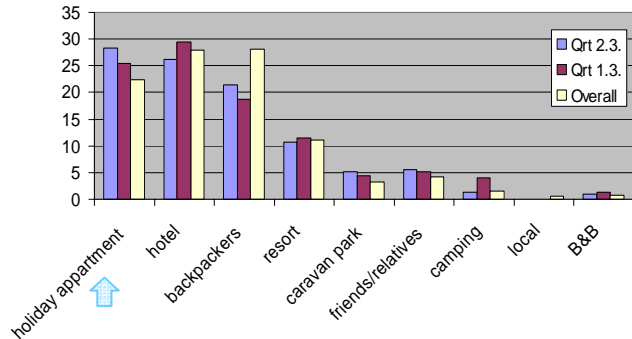


Figure 4: Respondents' choice of accommodation (%).

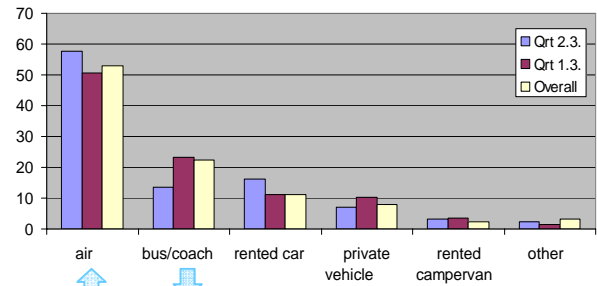


Figure 5: Respondents' choice of transport (%).

Last Holiday Location

The most popular single destinations given in response to “Where did you spend your last holiday?” are provided in the table below.

| OVERALL RESPONDENTS (N=397) | |
|-----------------------------------|-------|
| France | 8.5% |
| USA | 7.5% |
| New Zealand | 6.0% |
| Gold Coast | 3.3% |
| INTERNATIONAL RESPONDENTS (N=234) | |
| France | 13.7% |
| USA | 10.3% |
| New Zealand | 6.4% |
| Mexico | 4.7% |
| Spain | 4.7% |
| DOMESTIC RESPONDENTS (N=163) | |
| New Zealand | 5.5% |
| Gold Coast | 6.1% |
| Melbourne | 4.9% |
| Tasmania | 4.3% |

A thematic/regional analysis of the same results (last holiday location) shows the following trends:

| OVERALL RESPONDENTS (N=397) | |
|-----------------------------------|-------|
| Europe | 26.9% |
| Australia, excluding Queensland | 17.1% |
| NZ, Pacific and South-east Asia | 14.9% |
| Queensland | 14.4% |
| North America (inc. Caribbean) | 14.4% |
| Africa and Latin America | 9.6% |
| Asia | 3.0% |
| INTERNATIONAL RESPONDENTS (N=234) | |
| Europe | 39.6% |
| North America (inc. Caribbean) | 19.8% |
| NZ, Pacific and South-east Asia | 14.9% |
| Africa and Latin America | 13.2% |
| Australia | 6.6% |
| Queensland | 5.0% |
| Asia | 3.0% |
| DOMESTIC RESPONDENTS (N=163) | |
| Australia, excluding Queensland | 33.5% |
| Queensland | 28.6% |
| NZ, Pacific and South-east Asia | 16.3% |
| Europe | 8.4% |
| Asia | 4.3% |
| Africa and Latin America | 3.5% |

Alternative Destinations Considered

The most popular alternative destinations considered when planning this trip were:

| Destination |
|-------------|
|-------------|

| | |
|-------------|-------|
| Sydney | 6.56% |
| New Zealand | 5.51% |
| USA | 4.85% |
| Darwin | 4.06% |

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include visiting the reef, enjoying the climate and snorkelling (Figure 6).

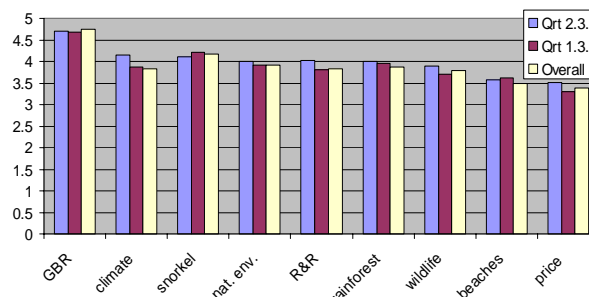


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

The sources of information used by respondents when planning their trip to the region are shown in the table below.

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|---------------------------------|-------------------|-------------------|---------|
| Friends and Relatives, or other | 42.2% | 41.5% | 42.1% |
| Internet | ↑ 28.9% | 20.3% | 25.3% |
| Guidebook | ↓ 27.4% | 35.3% | 32.2% |
| Travel Agent | ↑ 21.4% | 16.8% | 17.1% |
| Previous trip | 13.6% | 13.8% | 11.2% |

Previous Visits to the Reef

For 73.5% (67.9%; 73.6%) respondents this was their first visit to the reef.

Choice of Tour Operator

Visitors' most common reasons for choosing their reef tour operator were:

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|--|-------------------|-------------------|---------|
| Recommended by agent | ↑ 50.4% | 25.8% | 30.1% |
| Trip Destination | ↑ 25.4% | 3.3% | 9.1% |
| Availability | ↑ 22.1% | 4.9% | 9.0% |
| Price | ↑ 21.9% | 13.4% | 17.2% |
| Recommended by friend / relative, or other | 17.5% | 13.4% | 20.7% |

Diving Profile

When asked if they planned to dive the reef, 60.4% (52.4%; 44.6%) of respondents said yes. 40.6% (30.3%; 31.2%) of these respondents had no previous diving experience, 21.6% (26.3%; 23.6%) had one to four dives, 8.5% (13.6%; 13.4%) had five to 10 dives and only 29.3% (29.8%; 31.8%) had more than 10 dives.

Visits to Other Reefs

A total of 41.7% (57.6%; 47.0%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destinations were the Caribbean 17.1% (2.4%; 11.2%), the South Pacific 11.8% (15.3%; 11.2%) and Hawaii 9.5% (11.2%; 27.6%)

Activities Undertaken

The most common activities undertaken during the trip were:

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|---------------------|-------------------|-------------------|---------|
| Snorkelling | ↑ 80.0% | 70.2% | 69.4% |
| Swimming | 52.2% | 42.8% | 42.8% |
| Diving | ↓ 36.6% | 45.4% | 47.7% |
| Glass-bottom boat | 32.9% | 31.2% | 31.0% |
| View marine mammals | ↓ 29.7% | 33.6% | 31.7% |

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, with scores

of 9 and 10 accounting for 52.2% (52.0%; 52.3%) of the all responses. The mean satisfaction score was 8.50 (8.41; 8.46). 85.6% (88.9%; 85.4%) of respondents felt that they got value for money, and 91.4% (92.4%; 90.7%) said that they would recommend the trip to others.

The first four factors that **influenced satisfaction** (either positively or negatively) include:

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|-----------------------------------|-------------------|-------------------|---------|
| Staff / service / professionalism | 54.8% | 49.2% | 52.7% |
| Natural/marine environment | 28.2% | 21.4% | 24.2% |
| Weather / sea state (sea sick) | 26.6% | 32.0% | 24.7% |
| Diving / snorkelling | 19.6% | 16.2% | 16.1% |

Tourists' **best experiences** included:

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|-----------------------------------|-------------------|-------------------|---------|
| Diving / snorkelling | 49.4% | 49.0% | 49.4% |
| Marine life | ↑ 43.2% | 23.7% | 36.6% |
| Staff / service / professionalism | 13.0% | 13.4% | 12.5% |

Tourists' **worst experiences** included:

| | Quarter 3, Year 2 | Quarter 3, Year 1 | Overall |
|--------------------------------|-------------------|-------------------|---------|
| Weather / sea state (sea sick) | ↑ 45.0% | 30.8% | 33.3% |
| None | 35.3% | 32.7% | 31.3% |

When asked if the trip met their expectations, visitors recorded the following answers:

| | Reef | | Trip | |
|---------------|-------|-------------|-------|-------------|
| Not at all | 0.8% | 0.9% 0.7% | 0.3% | 0.6% 0.6% |
| Not very much | 2.4% | 2.4% 3.0% | 4.5% | 2.4% 3.4% |
| Somewhat | 32.7% | 31.8% 32.6% | 29.7% | 29.0% 32.2% |
| Very much | 64.1% | 64.8% 63.7% | 65.5% | 68.0% 63.9% |

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