Marine and Tropical Sciences Research Facility

Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM
QUARTERLY REPORT # 8
Quarter 4, Year 2 | Cairns and Port Douglas
October – December 2008

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTSRF), represented in North Queensland by the Reef and Rainforest Research Centre, and James Cook University (JCU) on reef tourism in the Great Barrier Reef (GBR). The aims and methodology of this research are presented in the introduction below. The data presented in this report summarise the results from the fourth quarter of data collection from the project's second year (N = 429). The results from the same quarter in the first year of data collection as well as the overall results for Cairns and Port Douglas are provided as a comparison. Results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For purposes of comparison, average results across all respondents from the Cairns and Port Douglas region are provided in brackets in the text.

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1. INTRODUCTION

The research described here falls under the MTSRF 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.

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 three locations across the Great Barrier Reef (Port Douglas and Cairns, 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 429 surveys were collected for this quarter (October to December 2008).

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).

3. LIMITATIONS

Due to funding issues, data from the Asian market have yet to be collected. Sampling bias by crews must also be

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Photo credits: Southern Cassowary, Wet Tropics Management Authority; Hill Inlet in the Whitsundays, Department of Foreign Affairs and Trade - Overseas Information Branch; Butterfly fish, Robert Thorn; Rainforest fruits Wet Tropics Management Authority.

considered and sample size may be limited by the methodology in some instances.

4. FINDINGS

Origin and Gender of Respondents

This quarter's sample did not vary much from the usual pattern of almost equal number of men (43.9%) and women (56.1%). Almost one-third of respondents (29.6%) were from Australia, of which 25.4% were from Queensland.

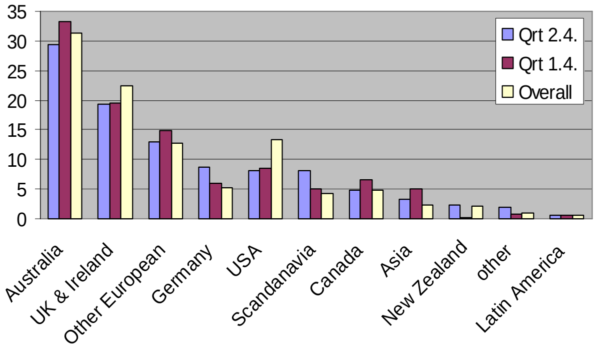


Figure 1: Origin of respondents.

Employment

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

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Professionals	28.4%	28.9%	27.2%
Students	18.9%	18.5%	19.0%
Retired	9.9%	6.2%	8.6%
Self-employed	7.9%	12.5%	8.4%

Age of Respondents

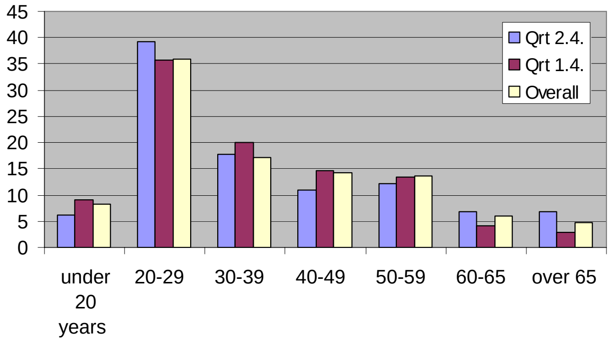


Figure 2: Age of respondents.

Travel Party

The majority of respondents were travelling as a couple, as shown in Figure 3.

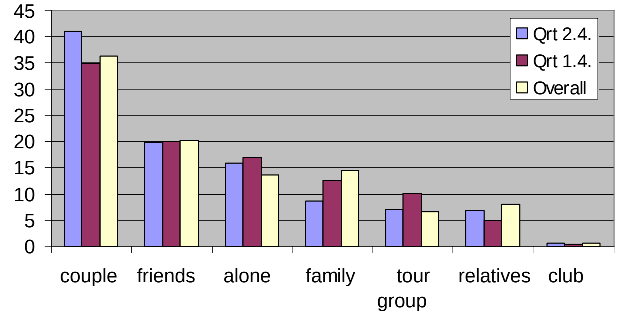


Figure 3: Respondents' travel party (%).

Previous Visits and Length of Stay

For 78.9% (79.7%) of respondents, this was their first visit to the region**.** The average length of stay was 3-4 nights.

Accommodation and Transport

Backpackers' accommodation was the most popular choice for respondents during this quarter (Figure 4), whilst air travel remains high (Figure 5).

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

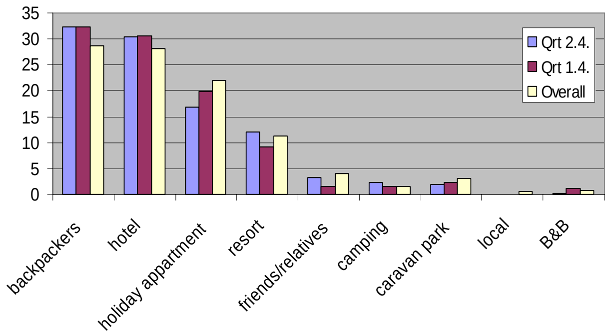
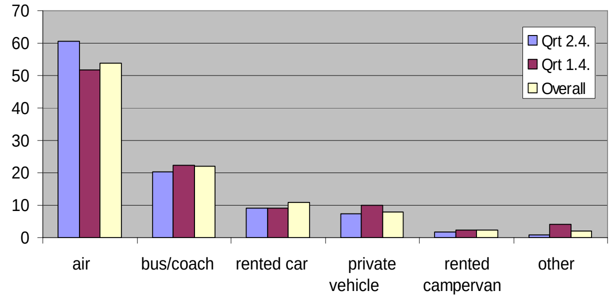


Figure 5: Respondents' choice of transport (%).



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=401)	
New Zealand	7.3%
USA	5.9%
Spain	5.0%
Italy	4.7%
France	4.3%
INTERNATIONAL RESPONDENTS (N=284)	
USA	8.5%
New Zealand	7.4%
Spain	6.3%
France	6.0%
Greece	4.2%
DOMESTIC RESPONDENTS (N=120)	
Gold Coast	9.2%
New Zealand	7.5%
Melbourne	4.2%
Bali	3.3%
Brisbane	3.3%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=404)	
Europe	33.4%
NZ, Pacific and South-east Asia	18.8%
Queensland	12.1%
Australia, except Queensland	11.9%
North America (inc. Caribbean)	11.6%
Africa and Latin America	7.7%
Asia	4.5%
INTERNATIONAL RESPONDENTS (N=284)	
Europe	40.9%
NZ, Pacific and South-east Asia	17.8%
N. America (inc. Caribbean)	15.3%
Africa and Latin America	9.6%
Australia	6.4%
Queensland	5.3%
Asia	4.6%
DOMESTIC RESPONDENTS (N=120)	
Queensland	28.6%
Australia, except Queensland	24.4%
NZ, Pacific and South-east Asia	21.0%
Europe	15.1%
Asia	4.2%
North America (inc. Caribbean)	3.4%
Africa and Latin America	3.4%

Alternative Destinations Considered

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

Destination	
Sydney	6.8%
New Zealand	6.7%
Thailand	3.6%
Perth	3.1%
Fiji	3.1%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region were to see the Great Barrier Reef and to go snorkeling and diving.

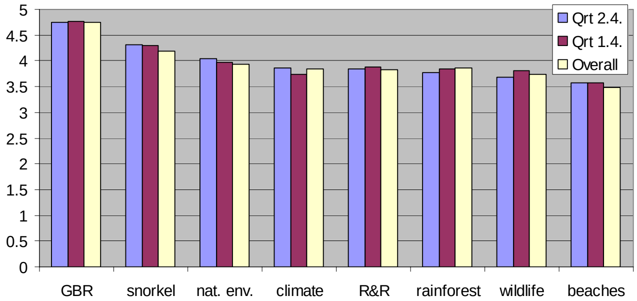


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Friends and Relatives, or other	45.1%	42.1%	*42.5%*
Internet	30.8%	27.7%	*25.9%*
Guidebook	31.3%	31.1%	*32.2%*
Travel agent	18.7%	23.4%	*17.2%*
Previous trip	11.9%	11.9%	*11.3%*

Previous Visits to the Reef

For 76.6% (71.6%) of respondents, this was their first visit to the reef.

Choice of Tour Operator

Visitors' most common reason cited for choice of reef tour operator was, as a percentage, recommendation by travel agent.

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Recommended by travel agent	43.4%	21.0%	31.8%
Trip destination	26.6%	3.0%	11.2%
Availability	21.8%	5.0%	10.6%
Price	29.0%	15.0%	18.7%
Recommended by friend / relative / other	19.4%	17.0%	20.7%

Diving Profile

When asked if they planned to dive the reef, 43.8% (55.7%) of respondents said yes. A total of 39.6% (32.4%) of respondents had no previous diving experience, 20.2% (23.3%) had completed one to four dives, 18.9%(15.5%) had completed between five and ten dives and 21.3% (28.8%) had completed more than ten dives previously.

Visits to Other Reefs

Over 46.1% (46.6%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was the Caribbean, 16.1% (11.6%), South-east Asia, 14.0% (15.9%), and the South Pacific, 11.7% (11.2%).

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Snorkeling	78.0%	48.2%	70.4%
Swimming	53.9%	26.8%	44.0%
Certified diving	26.5%	15.1%	22.9%
Glass-bottom boat	24.6%	21.2%	30.6%
View marine mammals	20.3%	33.9%	30.4%
Uncertified diving	11.6%	34.0%	14.2%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, scores of 9 and 10 accounting for 58.7% (52.9%) of the all responses, and the mean satisfaction score was 8.66 (8.48).

89.2% (85.8%) of respondents felt that they got value for money, and 93.7% (94.0%) said that they would recommend the trip to others).

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

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Staff / service / professionalism	56.3%	56.0%	56.3%
National environment	30.9%	15.9%	30.9%
Diving / snorkeling	20.5%	15.6%	20.5%
Weather / sea state (sea sick)	13.8%	26.4%	13.8%

Tourists' **best experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Diving / snorkeling	47.1%	51.5%	49.1%
Marine life	37.5%	25.7%	36.8%
Staff / service / professionalism	16.0%	15.2%	12.9%

Tourists' **worst experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
None	38.3%	40.2%	30.7%
Weather / sea state (sea sick)	16.4%	26.1%	33.8%

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

	Reef		Trip	
Not at all	0.0%	0.2%; 0.6%;	0.4%	0.5%; 0.6%
Not very much	4.2%	22.6%; 3.2%	3.2%	2.6%; 3.4%
Somewhat	26.1%	31.6%; 32%	29.5%	32.9%; 32%
Very much	69.5%	65.6%; 64.2%	66.8%	63.9%; 64.0%

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