



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 10 Quarter 2, Year 3 | Cairns and Port Douglas April to June 2009

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF), 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 second quarter of data collection from the project's third year (April to June 2009) (Qrt 3.2) (N = 638). Results from the same quarter from the second year of the project (Qrt 2.2) (N = 357), along with the overall results for the Great Barrier Reef region since November 2006 (N = 4,476) are provided as a comparison. Results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For comparison, figures from the corresponding quarter in Year 2 (Qrt 2.2) and Year 1 (Qrt 1.2), as well as overall, are provided in graphs, tables and throughout the text.



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 and Cairns, the Whitsundays and the Capricorn Coast). Results are available in an aggregate form as well as regionally. Currently, ten operators are involved in this research. A total of 638 surveys were collected for this quarter (April to June 2009).

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 have not been collected from the Asian markets. Sampling bias by crews must also be considered.



4. FINDINGS



Origin and Gender of Respondents

This quarter's sample included 40.5% (41.6% in Qrt 2.2; 45.5% overall) male respondents and 59.5% (58.4% in Qrt 2.2; 54.5% overall) female respondents. A third of the respondents, 33.7% (30.7% in Qrt 2.2; 31.8% overall), were from Australia, of which 16.3% were from Queensland (Figure 1).

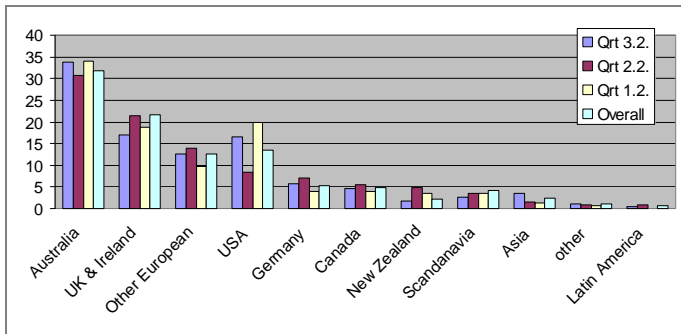


Figure 1: Origin of respondents (%).

Employment

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

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Professionals	27.4%	23.9%	23.0%	27.5%
Students	19.6%	27.1%	22.0%	18.9%
Self-employed	8.9%	6.0%	5.5%	8.8%
Management	8.1%	9.2%	7.1%	8.2%
Retired	6.8%	5.6%	9.2%	8.4%
Office workers	5.7%	8.0%	6.6%	6.3%

Age of Respondents

Respondents in the Cairns and Port Douglas region fell predominantly into the 20-29 year age group.

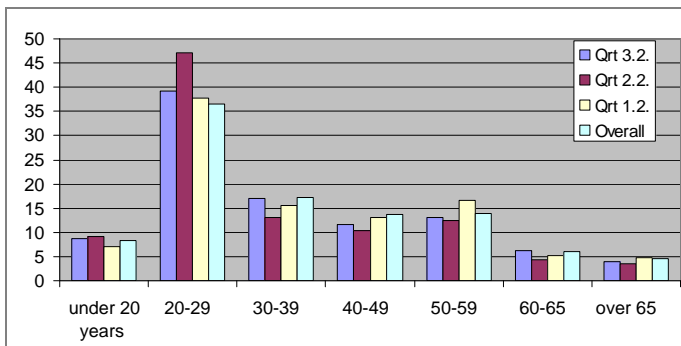


Figure 2: Age of respondents (%).

Travel Party

The majority of respondents were travelling with their partner (as a couple) or with friends (Figure 3).

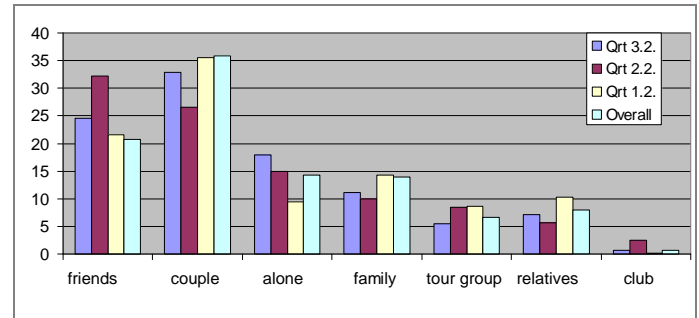


Figure 3: Respondents' travel parties (%).

Previous Visits and Length of Stay

For 84.2% (79.8% in Qrt 2.2; 79.7% overall) of respondents, this was their first visit to the region. The average length of stay was 2-5 (2-5 in Qrt 2.2; 3-5 overall) nights.

Accommodation and Transport

The use of backpackers' hostels as the preferred accommodation option has decreased in the region (Figure 4) whilst air travel remained the most popular form of transportation (Figure 5).

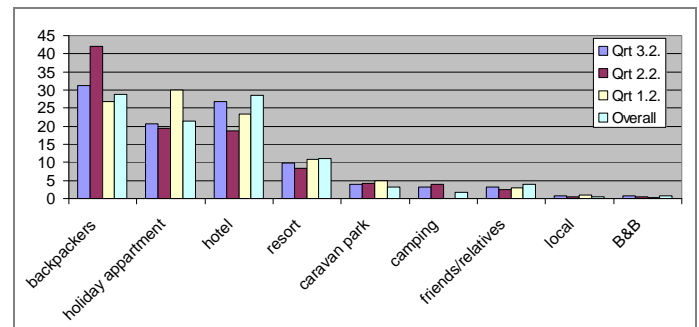


Figure 4: Respondents' choice of accommodation (%).

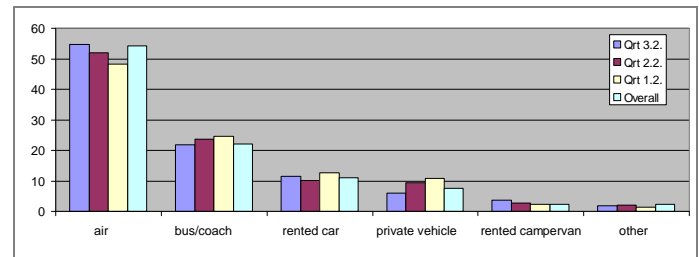


Figure 5: Respondents' choice of transport (%).

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 = 638)	
New Zealand	7.6%
USA	4.6%
Spain	4.2%
Thailand	3.4%
INTERNATIONAL RESPONDENTS (N = 423)	
New Zealand	7.2%
USA	6.4%
Spain	6.2%
Thailand	3.9%
DOMESTIC RESPONDENTS (N = 215)	
New Zealand	8.6%
Gold Coast	7.6%
Tasmania	6.1%

A thematic/regional analysis of the same results shows the following trends:

OVERALL RESPONDENTS (N = 638)	
Europe	25.6%
Australia, excluding Queensland	21.6%
NZ, Pacific and Southeast Asia	17.6%
North America (inc. Caribbean)	14.7%
Queensland	7.5%
Asia	6.7%
Africa and Latin America	6.3%
INTERNATIONAL RESPONDENTS (N = 423)	
Europe	33.5%
North America (inc. Caribbean)	21.0%
NZ, Pacific and Southeast Asia	16.9%
Australia, excluding Queensland	9.6%
Africa and Latin America	9.1%
Asia	7.5%
Queensland	2.3%
DOMESTIC RESPONDENTS (N = 215)	
Australia, excluding Queensland	45.9%
NZ, Pacific and Southeast Asia	18.9%
Queensland	17.9%
Europe	9.7%
Asia	5.1%
Africa and Latin America	1.0%

Alternative Destinations Considered

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

Destination	
New Zealand	6.6%
Sydney	6.1%
Fiji	4.6%
Thailand	3.9%
Melbourne	3.4%
Perth	2.8%
Darwin	2.6%

Motivations

The most important motivations (measured on a scale of 1 = *not at all important*, to 5 = *very important*) for visiting the region included visiting the Great Barrier Reef, rest and relaxation and snorkelling (Figure 6).

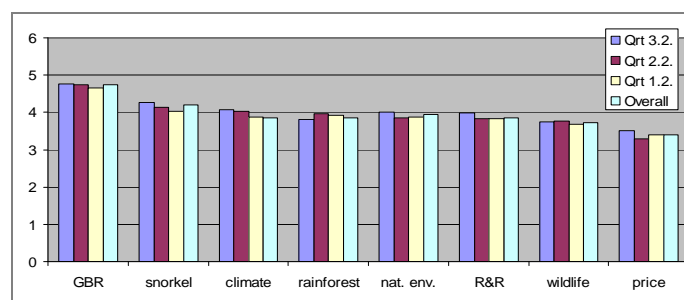


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

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

Info Source	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Friends and relatives	47.0%	45.2%	41.7%	43.0%
Guidebook	30.4%	36.4%	30.8%	31.8%
Internet / WWW	30.9%	27.5%	19.7%	27.0%
Have been before	11.7%	10.0%	13.3%	11.3%
Travel agent	16.0%	16.0%	16.1%	17.3%
Ads in print	3.2%	4.8%	4.3%	3.4%

Previous Visits to the Reef

For 74.9% (74.0% in Qrt 2.1; 79.7% overall) of respondents, this was their first visit to the reef.

Choice of Tour Operator

The most common reasons for choice of reef operator were:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Recommended by travel agent	42.4%	39.5%	23.7%	30.8%
Price	32.7%	27.6%	12.0%	20.0%
Availability	20.4%	11.9%	4.8%	16.3%
Advertising	16.6%	13.6%	9.6%	12.3%
Recommended by friend / relative / other	16.3%	8.6%	5.1%	18.9%

Diving Profile

When asked if they planned to dive the reef, 46.2% (40.0% in Qrt 2.2; 44.4% overall) of respondents said yes. Just over thirty percent (32.9%) (43.9% in Qrt 2.2; 33.3% overall) of these respondents had no previous diving experience; 22.4% (28.7% in Qrt 2.2; 23.2% overall) had completed between one and four dives; 15.8% (10.5% in Qrt 2.2; 15.1% overall) had completed between five and ten dives; and 28.2% (16.9% in Qrt 2.2; 28.4% overall) had completed more than ten dives.

Visits to Other Reefs

Just over forty-five percent (41.8% in Qrt 2.2; 47.3% overall) 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 19.6% (13.9% in Qrt 2.2; 13.6% overall), Southeast Asia 16.8% (11.2% in Qrt 2.2; 16.1% overall) and Hawaii 13.9% (10.8% in Qrt 2.2; 11.1% overall).

Activities Undertaken

The most common activities undertaken during the trip were:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Snorkelling	74%	73.6%	75.9%	67.8%
Swimming	51.0%	51.6%	46.7%	41.4%
Viewing marine animals	43.1%	26.4%	43.9%	32.9%
Diving	35.7%	40.6%	42.1%	49.3%
Glass-bottom boat tour	23.4%	29.3%	35.4%	30.7%

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 57.9% (48.3% in Qrt 2; 53.9% overall) of the all responses. The mean satisfaction score was 8.62 (8.25 in Qrt 2.2; 8.51 overall).

A total of 87.7% (79.7% in Qrt 2; 86.4% overall) of respondents felt that they achieved value for money, and 97.2% (88.0% in Qrt 2.2; 94.6% overall) said they would recommend the trip to others.

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

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Staff / service	51.6%	33.5%	51.4%	48.7%
Natural environment	26.6%	18.7%	28.6%	24.5%
Weather / sea state	20.7%	15.9%	29.7%	20.5%
Diving / snorkelling	19.7%	9.2%	7.1%	16.4%

Tourists' best experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Diving / snorkeling	49.9%	30.3%	44.9%	44.6%
Marine life	37.9%	26.3%	33.7%	30.9%
Staff / service	11.2%	8.8%	10.4%	11.7%

Tourists' worst experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Weather / sea state / sea sick	22.6%	25.9%	39.9%	26.4%
None	27.1%	14.7%	28.3%	24.1%

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

	Reef		Trip Overall	
Not at all	0.5%	0.4% in Qrt 2.2; 0.6% overall	0.3%	0.8% in Qrt 2.2; 0.5% overall
Not very much	4.5%	4.2% in Qrt 2.2; 3.4% overall	2.9%	4.2% in Qrt 2.2; 3.1% overall
Somewhat	28.6%	35.6% in Qrt 2.2; 31.4% overall	31.1%	36.4% in Qrt 2.2; 31.7% overall
Very much	66.4%	59.8% in Qrt 2.2; 64.7% overall	65.7%	58.6% in Qrt 2.2; 64.7% overall

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