



**Australian Government**

**Department of the Environment, Water, Heritage and the Arts**

## REEF TOURISM QUARTERLY REPORT # 11 Quarter 4, Year 3 | Cairns and Port Douglas October to December 2009

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 third quarter of data collection from the project's third year (October to December 2009) (Qrt 3.4) (N = 501). Results from the same quarter from the second year of the project (Qrt 2.4) (N = 429), along with the overall results for the Great Barrier Reef region since November 2006 (N = 5,271) 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 2.4) and Year 1 (Qrt 1.4), as well as overall, are provided in graphs, tables and throughout the text.



### 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.

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 544 surveys were collected for this quarter (October to December 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 of Respondents

This quarter's sample consisted of slightly fewer men, 49.4% (43.9%;<sup>1</sup> 46.0%;<sup>2</sup>) than women, 50.6% (56.1%; 54.0%).<sup>2</sup> A quarter of the respondents, 24.2% (30.8%; 31.0%), were from Australia, of which 33.3% were from Queensland (Figure 1).

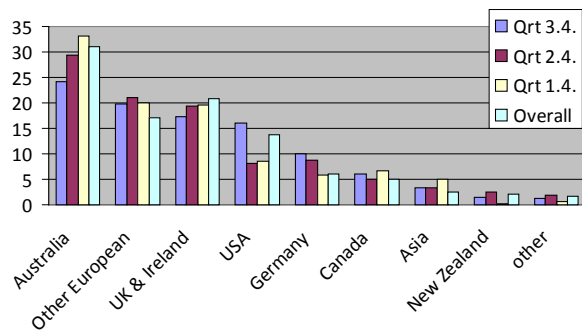


Figure 1: Origin of respondents.

### Employment

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Professionals	29.3%	28.4%	28.9%	27.5%
Students	17.3%	18.9%	18.5%	19.0%
Management	10.7%	7.3%	7.0%	8.4%
Retired	8.0%	9.9%	6.2%	8.3%
Self-employed	6.8%	7.9%	6.2%	8.7%
Public service	6.2%	5.2%	5.2%	5.8%

### Age of Respondents

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

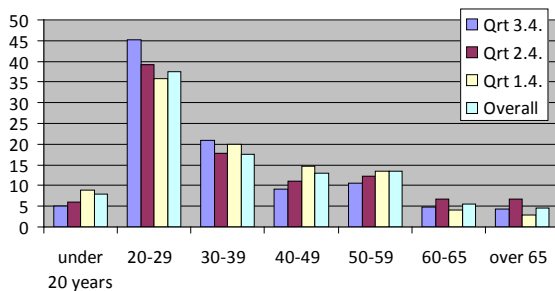


Figure 2: Age of respondents.

<sup>1</sup> Year 2, Quarter 4

<sup>2</sup> Overall sample.

### Travel Party

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

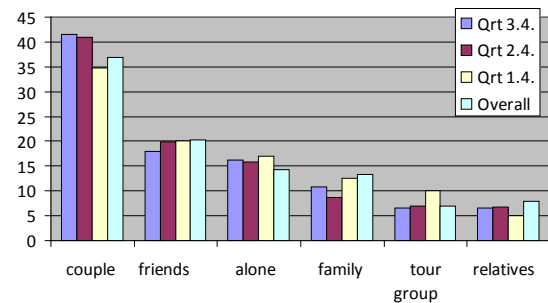


Figure 3: Respondents' travel party (%).

### Previous Visits

For 84.0% (78.9%; 80.1%) of respondents, this was their first visit to the region. The average length of stay was 2-7 (2-5;<sup>1</sup> 3-5)<sup>2</sup> nights.

### Accommodation and Transport

Hotels were the most popular accommodation indicating a shift away from backpacker accommodation (Figure 4). Air transport remains popular as in the previous years (Figure 5).

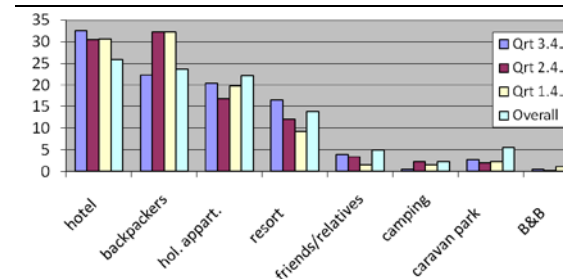


Figure 4: Respondents' choice of accommodation (%).

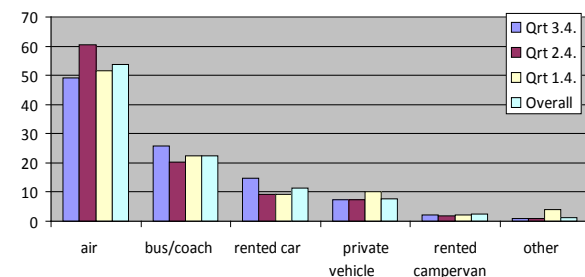


Figure 5: Respondents' choice of transport (%).

### 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= 493)	
USA	11.1%
New Zealand	5.2%
Gold Coast	5.2%
UK	4.0%
Fiji	3.5%
INTERNATIONAL RESPONDENTS (N=392)	
USA	16.0%
UK	6.2%
New Zealand	5.3%
Hawaii	3.5%
Thailand	3.5%
DOMESTIC RESPONDENTS (N=101)	
Gold Coast	12.5%
Fiji	5.3%
Melbourne	5.3%
New Zealand	5.3%

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

OVERALL RESPONDENTS (N=493)	
North America (inc. Caribbean)	20.9%
Europe	16.3%
NZ, Pacific and South-east Asia	16.3%
Australia, excluding Queensland	15.1%
Queensland	12.8%
Africa and Latin America	10.5%
Asia	8.1%
INTERNATIONAL RESPONDENTS (N=392)	
North America (inc. Caribbean)	28.3%
Europe	23.9%
Africa and Latin America	15.9%
NZ, Pacific and South-east Asia	15.0%
Asia	8.0%
Australia	5.3%
Queensland	3.6%
DOMESTIC RESPONDENTS (N=101)	
Australia, excluding Queensland	35.7%
Queensland	32.1%
NZ, Pacific and South-east Asia	17.9%
North America (inc. Caribbean)	7.1%
Asia	5.4%
Europe	1.8%

### Alternative Destinations Considered

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

Destination	
New Zealand	9.5%
Sydney	4.8%
Fiji	4.5%
Gold Coast	4.3%
Thailand	4.0%

### 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, snorkelling and enjoying the natural environment (Figure 6).

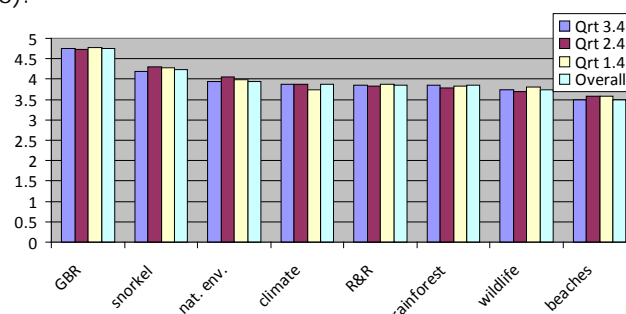


Figure 6: Respondents' motivations to visit the region (mean).

### Information Sources

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over all
Friends & Relatives, or other	45.4%	42.1%	42.1%	42.9%
Guidebook	33.3%	31.3%	31.3%	31.9%
Internet	29.0%	30.8%	27.7%	27.3%
Travel Agent	22.6%	18.7%	23.4%	17.8%
Previous trip	8.5%	11.9%	11.9%	11.2%

### Previous Visits to the Reef

For 78.9% (76.6%<sup>1</sup>; 74.9%<sup>2</sup>) respondents this was their first visit to the reef.

<sup>1</sup> Year 2, Quarter 4

<sup>2</sup> Overall sample

### Choice of Tour Operator

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Recommended by agent	44.3%	43.4%	21.0%	36.0%
Price	33.2%	29.0%	15.0%	22.5%
Trip Destination	24.9%	26.6%	3.0%	19.1%
Availability	22.1%	21.8%	5.0%	14.4%
Recommended by friend / relative, or other	15.4%	19.4%	17.0%	19.4%

### Diving Profile

When asked if they planned to dive the reef, 38.8% (43.8%<sup>5</sup>; 43.8%<sup>6</sup>) of respondents said yes. Twenty three percent (39.6%<sup>1</sup>; 33.0%<sup>2</sup>) of these respondents had no previous diving experience, 26.9% (20.2%<sup>1</sup>; 23.1%<sup>2</sup>) had one to four dives, 17.1% (18.9%<sup>1</sup>; 15.3%<sup>2</sup>) had five to 10 dives and 33% (21.3%<sup>1</sup>; 28.6%<sup>2</sup>) had more than 10 dives.

### Visits to Other Reefs

A total of 50.3% (46.1%<sup>1</sup>; 47.8%<sup>2</sup>) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destinations were South East Asia 15.8% (14.0%<sup>1</sup>; 15.8%<sup>2</sup>), the Caribbean 18.8% (16.1%<sup>1</sup>; 14.6%<sup>2</sup>), and Hawaii 11.4% (11.6%<sup>1</sup>; 31.0%<sup>2</sup>).

### Activities Undertaken

The most common activities undertaken during the trip were:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Snorkelling	72.8%	78.0%	48.2%	72.3%
Diving	56.8%	37.1%	49.1%	47.6%
View marine mammals	51.7%	20.3%	33.9%	35.0%
Swimming	48.5%	53.9%	26.8%	46.2%
Glass-bottom boat	18.8%	24.6%	21.2%	28.6%

<sup>5</sup> Year 2, Quarter 4

<sup>6</sup> Overall sample

### 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 53.7% (58.7%<sup>1</sup>; 53.8%<sup>2</sup>) of the all responses. The mean satisfaction score was 8.52 (8.66<sup>1</sup>; 8.52<sup>2</sup>). Eighty nine percent (89.2%<sup>1</sup>; 87.0%<sup>2</sup>) of respondents felt that they got value for money, and 97.9% (93.7%<sup>1</sup>; 95.1%<sup>2</sup>) said that they would recommend the trip to others.

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Staff / service / professionalism	45.4%	56.3%	56.0%	48.6%
Natural/marine environment	34.1%	30.9%	15.9%	26.2%
Diving / snorkel	25.4%	20.5%	15.6%	17.3%
Weather / sea state (sea sick)	17.0%	13.8%	26.4%	20.1%

Tourists' **best experiences** included:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Diving / snorkel	48.4%	47.1%	51.5%	45.2%
Marine life	45.1%	37.5%	25.7%	32.9%
Staff / service / professionalism	12.5%	16.0%	15.2%	12.2%

Tourists' **worst experiences** included:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
None	29.0%	38.3%	40.2%	24.4%
Weather / sea state (sea sick)	14.0%	16.4%	26.1%	25.1%

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

	Reef		Trip	
Not at all	0.9%	00%06%	0.9%	04%06%
Not very much	2.8%	42%29%	2.4%	32%29%
Somewhat	30.0%	26.1%31.3%	27.9%	29.5%31.6%
Very much	66.3%	69.5%64.8%	68.8%	66.8%64.9%

**For further information about this project contact James Cook University:**

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