REEF TOURISM
QUARTERLY REPORT # 3
Cairns and Port Douglas
May – July 2007

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 in Cairns and Port Douglas between May and July 2007. A total of 388 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: Results from the first and second quarters of data collection (November 2006 – January 2007; and February – April 2007 respectively) are included in this report for the purpose of comparison and are shown next to the current quarter's results in brackets. In some cases figures may have been rounded. A total of 736 surveys were collected in the first two quarters.

1. INTRODUCTION

The research described here falls under MTSRF's 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.

2. METHODOLOGY

The principle methodology for this research is visitor surveys distributed through participating tourism operators. Crew from these marine tourism operators distribute and collect the surveys at five locations across the Great Barrier Reef (Port Douglas, Cairns, Townsville, Airlie Beach and the Southern Region). Results are available in an aggregate form as well as regionally, such as the report presented here. Ten operators are currently involved in this research. A total of 388 surveys were collected in this quarter. Data is collected on reef visitors' socio-demographic characteristics, as well as travel patterns, motivations, activities, alternative destinations considered, satisfaction (including expectations and best and worst experiences).

3. LIMITATIONS

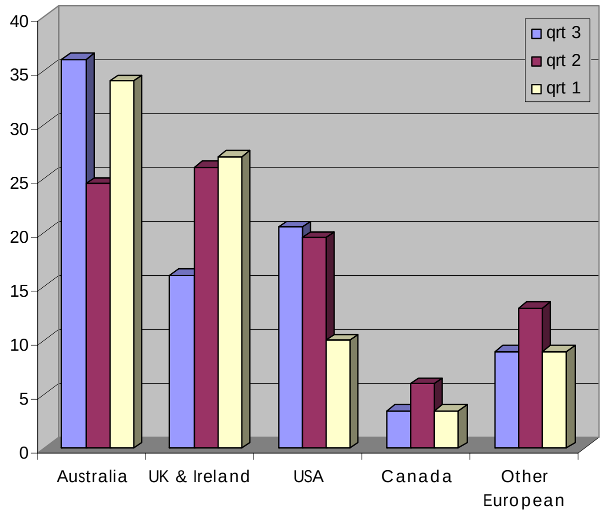
Data collection from the Japanese market is yet to be put into place, whilst radomisation and survey return issues remain to be solved.

4. FINDINGS

Origin of Respondents

The sample consisted of a similar proportion of males (50.5%) and females (49.5%) as the last quarter. Most respondents were from Australia, of which 19.5% were from Queensland.

Figure 1: Origin of respondents.



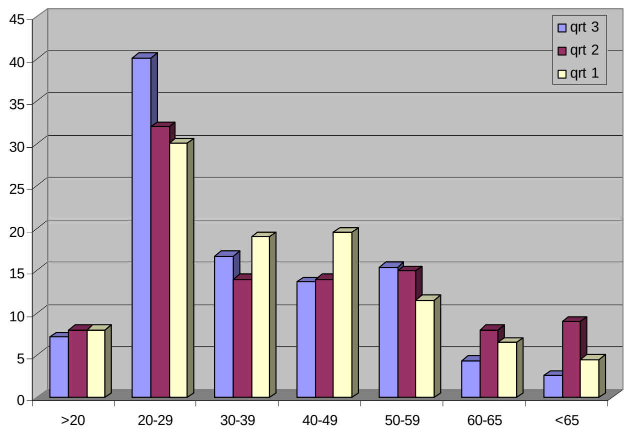
Employment

In terms of **employment**, the most common responses were:

	Quarter 3	Quarter 2	Quarter 1
Professionals	25%	21.5%	27.5%
Students	24%	16.5%	15%
Retired	7%	13.5%	11%
Self-employed	5%	9%	11%

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were travelling:

	Quarter 3	Quarter 2	Quarter 1
With a partner or spouse	32.5%	38.5%	37.5%
With family / relatives	25%	11%	15%
With friends	23.5%	23%	14.5%
Alone	11%	14.5%	16%

Previous Visits

For 76% (79%) of respondents, this was their first visit to Far North Queensland**.** Of those who had visited the region previously, just over two-thirds (67%) had visited the region once or twice before.

Accommodation and Transport

Just over a quarter of respondents, 28% (27.5%), were staying in backpackers' accommodation and another 22% were staying in hotels (32%), whilst holiday apartments and resorts were also popular with 29.5% of respondents staying in the first (17.5%) and 9% (13.5%) in the latter. Just under half the respondents, 47% (58%) flew into the region as their chosen mode of transport. Bus / coach was the next most popular choice of transportation for 26.5% of respondents, and another 23% used private or hired vehicles to reach their destination.

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=373)	
New Zealand	6%
Spain	4.5%
USA	4%
Thailand	6.5%
Melbourne	2.5%
INTERNATIONAL RESPONDENTS (N=237)	
Spain	6.5%
New Zealand	6%
USA	5%
Thailand	4.5%
France	3%
DOMESTIC RESPONDENTS (N=136)	
Melbourne	6.5%

New Zealand	6%
Tasmania	5%
Adelaide	5%
Gold Coast	5%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=373)		
Europe	24.5%	(34%)
Australia (except Queensland)	21%	(11%)
North America (including Carribean)	17.5%	(18%)
NZ, Pacific and South-east Asia	16.5%	(12%)
Queensland	10%	(8.5%)
Africa and Latin America	6.5%	(11%)
Asia	4%	(4%)
INTERNATIONAL RESPONDENTS (N=237)		
Europe	34%	(42%)
North America (including Carribean)	24%	(14%)
NZ, Pacific and South-east Asia	17.5%	(15%)
African and Latin America	8.5%	(6.5%)
Australia	6.5%	(5%)
Asia	5.5%	(4%)
Queensland	4%	(4%)
DOMESTIC RESPONDENTS (N=136)		
Australia (except Queensland)	46.5%	(29%)
Queensland	20%	(23%)
NZ, Pacific and South-east Asia	14.5%	(17%)
Europe	7.5%	(11%)
North America (including Carribean)	6%	(6.5%)
Africa and Latin America	3.5%	(3%)
Asia	2%	(4.5%)

Alternative Destinations Considered

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

- New Zealand 17.5%
- Sydney 11%
- Fiji 10.5%
- Darwin 8%
- Melbourne 6.5%
- Gold Coast 6%

Motivations

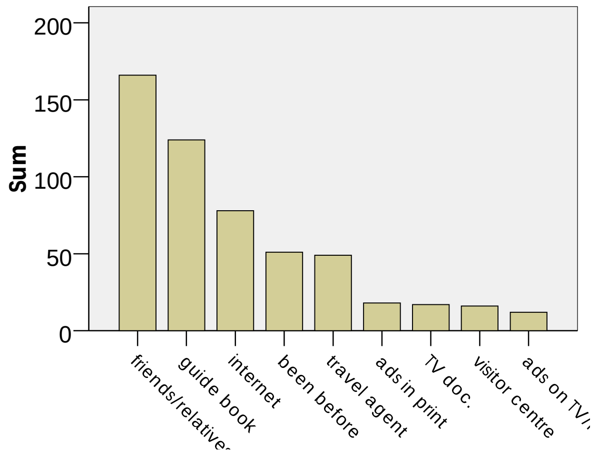
The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef.......... 4.66* **(4.7)**
- Snorkelling and diving ....4.13 **(4.14)**
- Rest and relax ....3.83 **(3.8)**
- Experience natural environ. ....3.82 **(3.8)**

* Shown as a mean.

Information Sources

Figure 3: Information sources used in planning.



Previous Visits to the Reef

For 71% (71%) of respondents, this was their first visit to the reef. Of those who had been to the reef before, 79% (97%) had been between one and four times before.

Choice of Tour Operator

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

	Quarter 3	Quarter 2	Quarter 1
Recommended by others	15.5%	17.9%	-
Recommended by agent	31.5%	14.7%	-
Price	14%	14.9%	15.5%
Advertising	12.5%	8.7%	7.5%
Availability	5%	11.1%	32.5%
Recommended by friend / relative	5%	6.4%	-
Package	4%	9.6%	9.8%

Diving Profile

When asked if they planned to dive the reef, 41% (38.5%) of respondents said "Yes". Thirty percent (27%) of respondents had no previous diving experience; 26.5% (25%) of respondents had completed between one and four dives; and 15% (11%) had completed between five and ten dives. A total of 28.5% (36%) of respondents had completed more than ten dives.

Visits to Other Reefs

Over 46% (47%) of respondents had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was South-east Asia, mentioned by 19.5% of respondents, or other Australian reefs, mentioned by 14.5% (10.5%) of respondents*. Another 10% of respondents had been to the reefs of the South Pacific. Of the respondents who had visited other reefs, 60.5% (59%) of respondents felt that other Australian reefs were the same or better, 51.5% (47%) felt that reefs of South-east Asia were the same or better, and 61.5% (70%) felt that the reefs of South-east Asia were the same or better.

* Whilst respondents were asked if they had been to reefs in Australia other than the Great Barrier Reef (e.g. Ningaloo, WA), it is apparent that some respondents replied that they had been to other reefs located within the Great Barrier Reef.

Perceptions of the Reef Trip

In descending order of frequency, **perceptions of the reef tours** were:

	Quarter 3	Quarter 2	Quarter 1
"A fantastic reef tour for all"	42%	38.5%	40%
"A relaxing fun filled day on the reef"	40%	40.5%	33.5%
"Introduction to the reef"	25%	21%	22%

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 3	Quarter 2	Quarter 1
Snorkelling	70%	75.5%	67.5%
Swimming	43.5%	40%	36%
View marine mammals	38.5%	24.5%	23%
Glass-bottom boat	33.5%	43%	35%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 = very low, to 10 = very high) were generally high, with scores of 9 and 10 accounting for 54.5% (51%) of all responses, and the mean satisfaction score was 8.42 (8.45).

Eighty-five percent (86%) of respondents felt that they achieved value for money, and 91% (91%) said they would recommend the trip to other travellers.

The first five factors that influenced satisfaction (either positively or negatively) included:

	Quarter 3	Quarter 2	Quarter 1
Staff / service / professionalism	32.5%	26.5%	27%
Weather / sea state (sea sick)	21%	10.3%	7.5%
Natural environment	17%	17.7%	15.5%
Diving / snorkelling	10.5%	6.5%	6.5%
Food and beverages	7.5%	8.8%	8%

Tourists' **best experiences** included:

	Quarter 3	Quarter 2	Quarter 1
Diving / snorkelling	33.5%	35.5%	17.2%
Marine life	21.5%	14%	6%
Staff / service / professionalism	7.5%	9%	9%
Coral	2.5%	11%	12%

Tourists' **worst experiences** included:

	Quarter 3	Quarter 2	Quarter 1
Weather / sea state (sea sick)	45.5%	21.5%	66%
None	22.5%	19.5%	-

Comfort / safety	4.5%	5.5%	17%
Uncomfortable snorkelling / diving	3%	5%	19%
Poor coral / no fish	2.5%	6.5%	6.7%

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

	Reef	Trip
Not at all	1.5% (1%)	1.5% (1.7%)
Not very much	2.5% (2.7%)	1.5% (4%)
Somewhat	34% (31%)	34.5% (28.5%)
Very much	62% (67.5%)	62.5% (66.5%)

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