REEF TOURISM
QUARTERLY REPORT # 1
Cairns and Port Douglas
November 2006 – January 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 first quarter of data collection in the Cairns and Port Douglas region between November 2006 and January 2007. A total of 409 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

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. Fourteen operators are currently involved in this research. 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

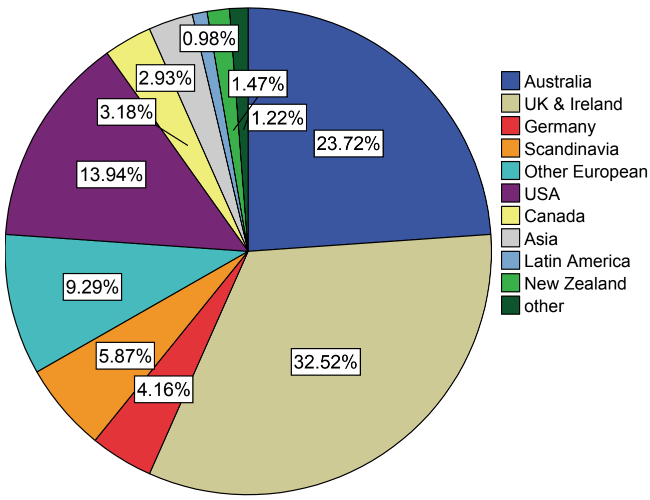
During this period, the major limitations included poor weather and low visitor numbers.

4. FINDINGS

Socio-Demographics

The sample consisted of 47.3% females and 52.7% males. Most respondents were from the UK and Ireland (32.52%), followed by Australia (23.72%) and Europe (19.22%), with Germany and Scandinavia making up more than half of the European respondents (10.03%).

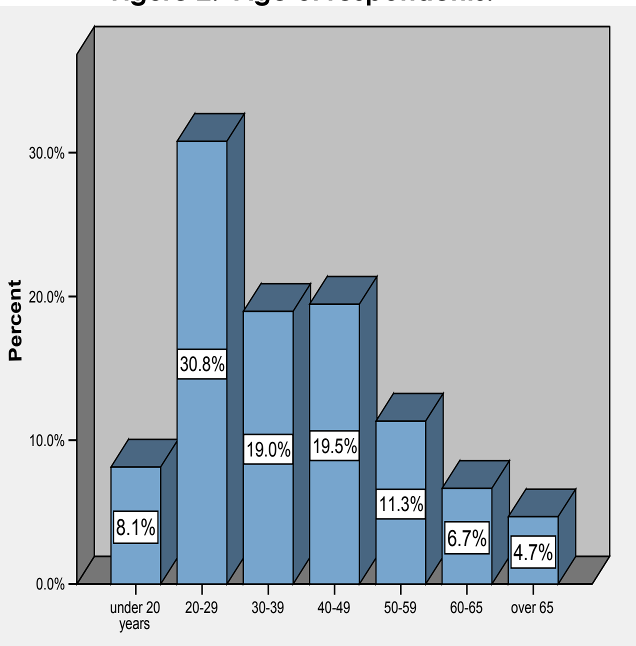
Figure 1: Origin of respondents.



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

- Professionals.. 27.4%
- Students.. 14.9%
- Management..................................... 12.4%
- Retired 11.2%
- Self-employment................................ 10.9%

Figure 2: Age of respondents.



Travel Behaviour

The majority of respondents were **traveling**:

- With a partner or spouse 37.6%
- Alone 16%
- With their family.................................. 15.2%
- With friends 14.5%

For 75% of respondents, this was their **first visit to Far North Queensland.** Of those who had visited the region previously, nearly half (46.5%) had visited twice before, with most (89%) having visited between one and seven times. The average **length of stay** was 7.74 nights, with the majority of respondents staying four nights (modal average).

One-third of respondents chose hotels for their **accommodation**, with backpacker accommodation being nearly as popular (27.5%). Resorts and holiday apartments also accounted for a number of responses (17.5% and 15.5%, respectively). Over 65% of respondents flew into Cairns as their **mode of transport,** whilst another 44% took the bus or coach to Port Douglas.

Previous Holidays and Alternative Destinations

The ten most popular single destinations given in response to "Where did you spend your last holiday?" are provided in the table below:

OVERALL RESPONDENTS (N=414)	
SPAIN	5.13%
FRANCE	4.81%
THAILAND	4.49%
NONE	3.85%
GREECE	3.21%
NEW ZEALAND	3.21%
USA	3.21%
INTERNATIONAL RESPONDENTS (N= 314)	
SPAIN	5.13%
FRANCE	4.81%
THAILAND	4.49%
NONE	3.85%
GREECE	3.21%
NEW ZEALAND	3.21%
USA	3.21%
SOUTH AFRICA	2.56%
SYDNEY	2.56%
SOUTH AFRICA	2.56%
DOMESTIC RESPONDENTS (N=97)	
NEW ZEALAND	9.28%
NONE	4.12%
CAIRNS	4.12%
GOLD COAST	4.12%
WHITSUNDAYS	4.12%
AIRLIE BEACH	3.09%
BALI	3.09%
EUROPE	3.09%
SYDNEY	3.09%

A **thematic / regional analysis** shows the following trends:

OVERALL RESPONDENTS (N=414)	
QUEENSLAND TOURISM CENTRES	7.6%
QUEENSLAND OTHER	1.5%
AUSTRALIAN CITIES	5.4%
AUSTRALIA OTHER	4.9%
EUROPE	34.5%
NZ, PACIFIC & SOUTH-EAST ASIA	12.5%
NORTH AMERICA (inc. Carribean)	16.4%
AFRICA & LATIN AMERICA	9.8%
ASIA	2.9%
DOMESTIC RESPONDENTS (N=97)	
QUEENSLAND TOURISM CENTRES	29%
QUEENSLAND OTHER	4.5%

AUSTRALIAN CITIES	9.3%
AUSTRALIA OTHER	16.5%
EUROPE	9.3%
NZ, PACIFIC & SOUTH-EAST ASIA	17.5%
NORTH AMERICA (inc. Carribean)	5.2%
AFRICA & LATIN AMERICA	2.1%
ASIA	3.1%
INTERNATIONAL RESPONDENTS (N=314)	
QUEENSLAND TOURISM CENTRES	1.3%
QUEENSLAND OTHER	4.2%
AUSTRALIAN CITIES	4.1%
AUSTRALIA OTHER	1.3%
EUROPE	42.3%
NZ, PACIFIC & SOUTH-EAST ASIA	10.95
NORTH AMERICA (inc. Carribean)	19.9%
AFRICA & LATIN AMERICA	12.2%
ASIA	2.9%

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

DESTINATION	FREQ.	%
NONE	151	9.61
NEW ZEALAND	78	4.96
SYDNEY	63	4.01
MELBOURNE	45	2.86
FIJI	41	2.61
CAIRNS	37	2.35
THAILAND	34	2.16
BRISBANE	27	1.72
GOLD COAST	27	1.72
USA	26	1.65
PERTH	22	1.40
DARWIN	21	1.34
TASMANIA	17	1.08
WHITSUNDAYS	14	0.89
SOUTH AFRICA	13	0.83
SOUTH AMERICA	13	0.83
TOWNSVILLE	12	0.76
ALICE SPRINGS	11	0.70
EUROPE	11	0.70
PORT DOUGLAS	11	0.70

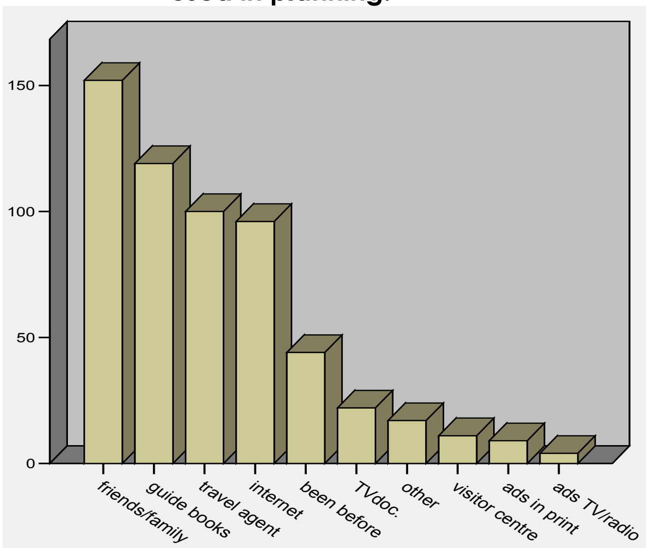
Motivation and Planning

The most important motivations for visiting the region (ranked on a scale of 1 to 5, with 5 being most important) include:

- Visit the GBR................................4.8 (mean)
- Snorkelling and diving........................... 4.13
- Visit the rainforest.................................... 3.8
- Experience the natural environment..... 3.8
- See Australian wildlife 3.68
- Rest and relaxation 3.65
- Enjoy the climate 3.64
- "Because the price matched my budget"..3.23
- Participate in adventure activities 3.18

Information sources used to plan the holiday are shown in Figure 3.

Figure 3: Information sources used in planning.



For most respondents (72%) this was their **first visit to the reef**. Of those who had been to the reef before, over half (54%) had only been once or twice before. A further 12% had been to the reef more than once on the same trip. The repeat visitors were often Australian (47%).

The most common reasons for **choosing their reef tour operator** were:

- Recommended to the respondents 40.8%
- Price 15.5%
- Part of a package tour 9.8%
- Appealing / effective advertising 7.5%

When visitors were asked if they **planned to dive** the reef, 42% of respondents said 'Yes'. Of these, 26.5% had never dived before, 22% had completed less than five dives, and 46.2% had completed less than fifty dives. Twelve respondents said they had completed more than fifty dives.

Reef Experience

Approximately half of the respondents had visited other coral reefs before coming to the Great Barrier Reef. The most popular **alternative reef destinations** are:

- Caribbean .... 71 respondents
- South-east Asia.................... 51 respondents
- Hawaii.................................. 46 respondents
- Other Australian reefs .... 44 respondents†

† Some respondents may have selected this answer when referring to other reefs on the Great Barrier Reef.

Disregarding other Australian reefs, the Caribbean and South-east Asia had the most **repeat visits;** the Caribbean was visited a total of 80 times by 33 respondents, and South-east Asia was visited 40 times by 21 respondents‡. When comparing other reefs to the Great Barrier Reef, the Red Sea, the South Pacific and Hawaii compare most favourably to the Great Barrier Reef. No reef was consistently ranked as being better than the Great Barrier Reef.

‡ Of the 21 respondents, some have been to each reef more than once.

Table 1: Comparisons to Great Barrier Reef.

	Same	Better	Worse
South-East Asia	16.6%	41.7%	41.7 %
South Pacific	14.3%	50.0%	38.5%
Indian Ocean	19.5%	38.5%	41.9%
Caribbean	12.0%	36.0%	52.0%
Red Sea	24.0%	46.0%	30.0%
Hawaii	21.4%	31.0%	47.6%
Other Aust. reefs	20.0%	39.0%	41.0%

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

- "A fantastic reef tour for all" 40%
- "A relaxing fun filled day on the reef" 33.5%
- "Introduction to the reef".......................22%
- "Fun diving" 17.5%
- "Adventure diving expedition" 13%
- "Luxury live-aboard" 2.5%

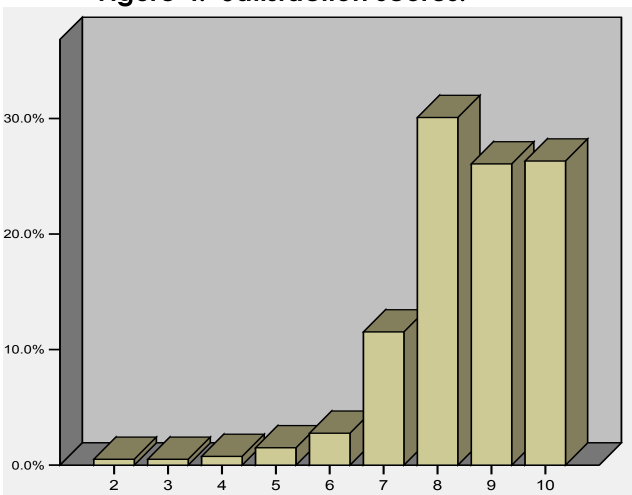
The most common **activities** (respondents could select more than one activity) undertaken during the trip were:

- Snorkeling.. 67.5%
- Swimming...36%
- Glass-bottom boat reef viewing 35%
- Certified diving.................................... 23.5%
- Viewing marine animals, particularly fish, turtles, corals, sea cucumbers, sharks and dolphins 23%
- Overnight cruise.................................. 14.5%
- Uncertified diving................................ 10.5%
- Diver training 10%
- Sailing...11%
- Visiting the islands 5.4%

Satisfaction ratings (on a scale of 1 – low satisfaction, to 10 – high satisfaction) were generally high, with scores of 9 and 10 accounting for 51% of all responses. The mean satisfaction score was 8.5.

Eight-six percent of respondents felt that they achieved **value for money**, and 91% said that they would **recommend the trip** to others.

Figure 4: Satisfaction scores.



The five factors that influenced satisfaction (either positively or negatively) most frequently include:

- Staff / service / professionalism.......... 27.6%
- Natural environment 15.5%
- Food and Beverages.............................. 8%
- Weather / sea state (sea sick) 7.5%
- Diving / snorkelling 6.5%

Tourists' **best experiences** include:

- Diving/snorkelling 17.2%
- Coral 12%
- Staff / service / professionalism............... 9%
- Fish 6%
- Glass-bottom boat.................................. 5%

Tourists' **worst experiences** include:

- Weather / sea state (sea sick) 66%
- Food and beverage.............................. 31%
- The trip out to the reef........................... 22%
- Poor diving / snorkeling 19%
- Comfort / safety 17%

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

	Reef	Trip
Not at all	0.85%	0.3%
Not very much	2.3%	4%
Somewhat	29%	27.5%
Very much	67%	68.3%

For further information about this project contact James Cook University:

Project Leader
Professor Bruce Prideaux
Bruce.Prideaux@jcu.edu.au
Phone: (07) 4042 1039

Project Manager
Dr Alexandra Coghlan
Alexandra.Coghlan@jcu.edu.au
Phone: (07) 4042 1763

For future updates, visit
www.rrrc.org.au/publications