

## **REEF TOURISM QUARTERLY REPORT 5 Cairns and Port Douglas Quarter 1, Year 2**

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 first quarter of data collection from the second year (N = 422); the results from the same quarter in the first year of data collection (N = 405); and the overall results for the period between November 2006 and March 2008 (N = 2304). The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

**Note:** For purposes of comparison, the figures for the entire sample and the same quarter from Year 1 are provided in the text in brackets after the figures for this quarter (Quarter 5).



### **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.



### **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 the Great Barrier Reef (Port Douglas, Cairns, Townsville and Airlie Beach). 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 422 surveys were collected in the first quarter of Year 2.

Data are collected on reef visitors' socio-demographic characteristics, and travel patterns, motivations, activities, alternative destinations considered and level of satisfaction (including expectations and best and worst experiences).



### **3. LIMITATIONS**



Data collection from the Asian market is yet to be established. Sampling bias by crews must also be considered.



### **4. FINDINGS**



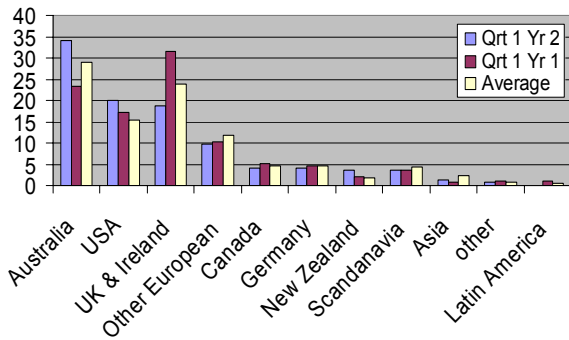
#### ***Origin of Respondents***

This quarter's sample did not vary much from the usual pattern of almost equal number of men, 48.8% (51.4%;<sup>1</sup> 47.7%;<sup>2</sup>) and women, 51.2% (48.6%; 52.3%). Just over a third of respondents, 34.0% (23.3%; 29.0%), were from Australia, of which 8.6% were from Queensland (Figure 1).

<sup>1</sup> Quarter 1, Year 1.

<sup>2</sup> Overall sample.

**Figure 1: Origin of respondents.**



**Employment**

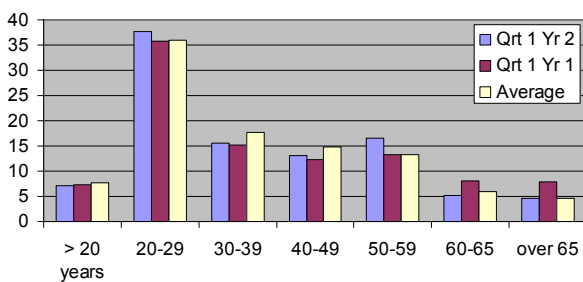
In terms of **employment**, the most common responses were (as a percentage of the total):

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Professionals	23.0%	20.0%	27.1%
Students	22.0%	15.8%	17.5%
Retired	9.2%	14.4%	9.1%
Management	7.1%	10.2%	8.3%

**Age of Respondents**

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

**Figure 2: Age of respondents.**



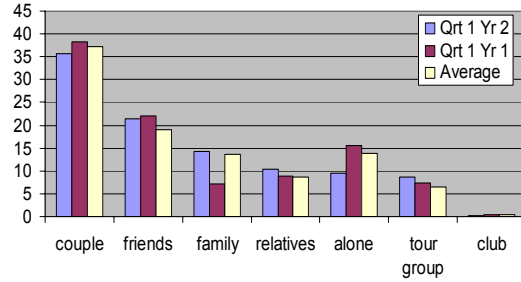
**Previous Visits and Length of Stay**

For 77.9% (81.3%; 78.8%) of respondents, this was their first visit to the region. The average length of stay was 3-5 (3-5; 3-5) nights.

**Travel Party**

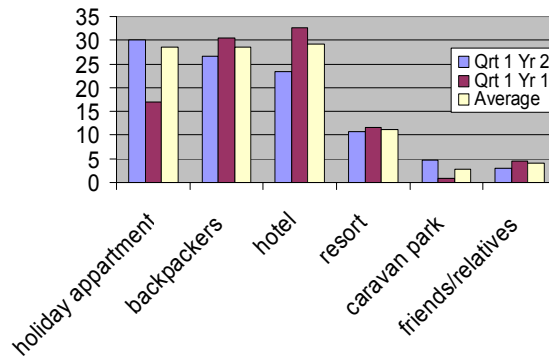
The majority of respondents were travelling with their partner, as shown in Figure 3:

**Figure 3: Respondents' travel party (%).**

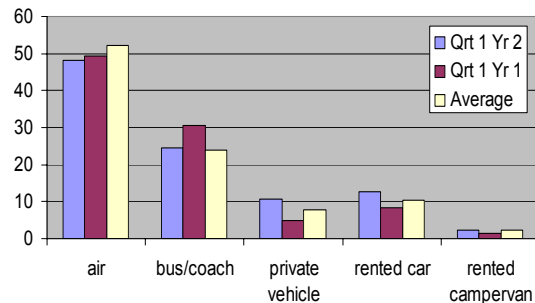


**Accommodation and Transport**

**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=420)	
New Zealand	5.92%
Spain	5.21%
Thailand	4.27%
USA	3.79%
France	3.08%
INTERNATIONAL RESPONDENTS (N=278)	
New Zealand	9.4%
Spain	7.6%

USA	5.0%
Thailand	4.3%
France	4.0%
<b>DOMESTIC RESPONDENTS (N=216)</b>	
Tasmania	4.9%
Melbourne	4.9%
New Zealand	4.2%
Thailand	4.2%
Victoria	4.2%

Gold Coast	2.48%
Thailand	2.11%

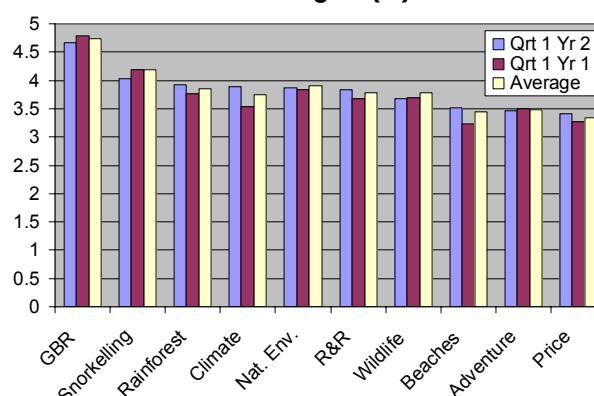
### Motivations

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 Great Barrier Reef, snorkelling, and seeing the rainforest (Figure 6):

A thematic/regional analysis shows the following trends:

<b>OVERALL RESPONDENTS (N=420)</b>	
Europe	26.0%
Australia, excluding Queensland	18.1%
Queensland	9.8%
NZ, Pacific and South-east Asia	16.9%
North America including Caribbean	13.3%
Asia	3.6%
Africa and Latin America	7.9%
<b>INTERNATIONAL RESPONDENTS (N=278)</b>	
Europe	34.2%
North America including Caribbean	18.7%
NZ, Pacific and South-east Asia	18.0%
Africa and Latin America	9.4%
Queensland	4.0%
Asia	4.0%
Australia	6.1%
<b>DOMESTIC RESPONDENTS (N=142)</b>	
Australia except Queensland	41.8%
Queensland	21.3%
NZ, Pacific and South-east Asia	14.2%
Europe	9.9%
North America including Caribbean	2.8%
Asia	2.8%
Africa and Latin America	5.0%

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



### Information Sources

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Guidebook	30.8%	36.6%	32.7%
Internet	19.7%	22.3%	24.1%
Friends and Relatives, or other	41.7%	41.6%	42.0%
Have been before	13.3%	9.4%	11.0%
Travel agents	16.1%	13.6%	16.5%

### Alternative Destinations Considered

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

Destination	
New Zealand	9.67%
Sydney	5.58%
Fiji	4.96%
Melbourne	3.10%
Darwin	2.97%
Airlie Beach	2.73%
Perth	2.73%
Brisbane	2.48%

### Previous Visits to the Reef

For 74.0% (73.4%; 73.5%) of respondents, this was their first visit to the reef.

### Choice of Tour Operator

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Recommended by agent	21.2%	26.4%	21.7%
Recommended by friend / relative	16.9%	25.8%	18.6%
Price	10.7%	11.9%	13.3%

Package	6.9%	10.5%	7.0%
Advertising	8.5%	6.3%	5.1%
Availability	4.3%	4.8%	5.9%
Type and range of activities	6.4%	5.7%	5.9%
Size of operation	5.1%	4.3%	6.8%

### Diving Profile

When asked if they planned to dive the reef, 37.3% (45.4%; 45.7%) of respondents said yes. 32.3% (28.4%; 29.5%) of these respondents had no previous diving experience, 22.0% (27.2%; 23.3%) had completed between one and four dives, 13.4%(14.6%; 9.3%) had completed five to ten dives and only 32.3% (25.0%; 31.1%) had completed more than ten dives.

### Visits to Other Reefs

Over 45.8% (47.3%; 48.5%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destination was South-east Asia 17.5% (22.0%; 18.5%), Micronesia 9.7% (7.4%; 7.9%), the South Pacific 8.8% (9.4%; 11.1%), and the Indian Ocean 8.8% (13.1%; 11.8%).

### Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Snorkelling	75.9%	67.0%	66.8%
Swimming	46.7%	41.8%	40.4%
View marine animals	43.9%	33.5%	34.3%
Diving	43.1%	46.8%	50.4%
Glass-bottom boat	35.4%	33.3%	30.5%

### 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 52.7% (56.5%; 52.7%) of all responses. The mean satisfaction score was 8.41 (8.48; 8.47).

84.1% (84.5%; 86.2%) of respondents felt they achieved value for money, and 90.0%

(92.6%; 90.9%) said they would recommend the trip to others.

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Staff / service / professionalism	51.4%	52.6%	41.8%
Natural environment	28.6%	27.7%	32.4%
Weather / sea state (sea sick)	29.7%	24.3%	30.7%
Diving / snorkelling	17.1%	13.6%	20.4%

Tourists' **best experiences** included:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Diving / snorkelling	44.9%	51.4%	58.7%
Marine life	29.7%	23.3%	30.3%
Staff / service / professionalism	10.4%	12.4%	17.8%

Tourists' **worst experiences** included:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Weather / sea state (sea sick)	39.9%	32.6%	38.4%
None	28.3%	20.8%	32.5%

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

	Reef		Trip	
Not at all	1.0%	1.3 %; 0.9%;	0.7%	1.6%; 0.7%
Not very much	4.2%	3.1%; 3.7%	2.5%	4.4%; 3.1%
Somewhat	32.7%	31.8%; 33.5%	36.6%	31.3%; 32.2%
Very much	62.2%	63.8%; 61.9%	60.8%	62.8%; 64.1%

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