Reef & Rainforest RESEARCH CENTRE

JAMES COOK UNIVERSITY

Australian Government

Department of the Environment and Water Resources

REEF TOURISM
QUARTERLY REPORT # 1
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 between November 2006 and January 2007. A total of 677 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

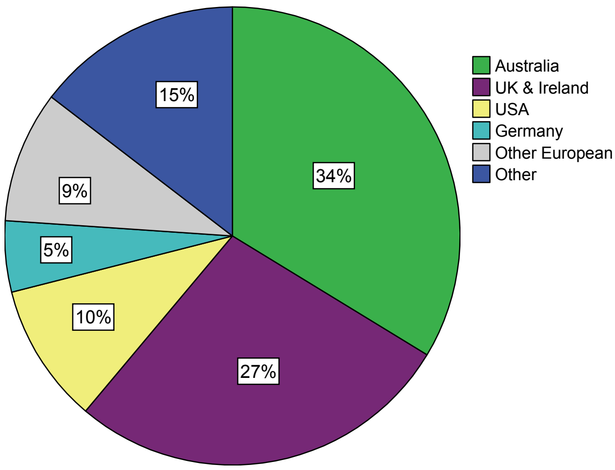
During this period, the major limitations included poor weather and low visitor numbers.

4. FINDINGS

Origin of Respondents

The sample consisted of 51% females and 49% males. Most respondents were from Australia (33%), of which 44% were from Queensland.

Figure 1: Origin of respondents.



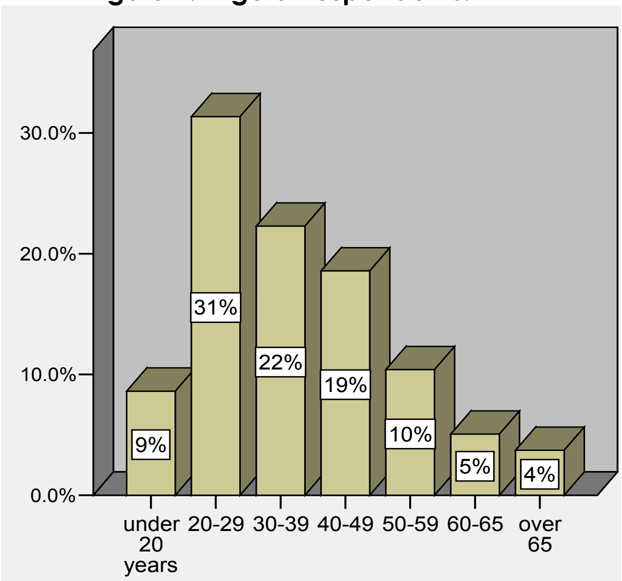
Employment

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

- Professionals 27.5%
- Students 15%
- Self-employment 10%

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were **traveling**:

- With a partner or spouse 37.5%
- With their family / relatives 17.5%
- With friends 13.5%

Previous Visits

For 70% of respondents, this was their first visit to Far North Queensland. Of those who had visited the region before, two-thirds (66%) had visited once or twice before.

Accommodation and Transport

Respondents were divided equally between hotels and backpacker hostels (25% each), whilst resorts and holiday apartments were also popular (16.5% and 14% respectively). Nearly half the respondents (47%) flew into the region as their **mode of transport,** the bus/coach was the next most popular transportation (21.5%) and another 25% used private vehicles or rented cars to reach their destination (12.5% each).

Previous Holiday Location

The **most popular single destinations** given in response to "Where did you spend your last holiday?" are provided in the following table.

OVERALL RESPONDENTS (N=677)	
NEW ZEALAND	4.3%
SPAIN	4.1%
FRANCE	3.1%
GREECE	2.8%
USA	2.8%
ITALY	2.7%
THAILAND	2.7%
SYDNEY	2.2%
INTERNATIONAL RESPONDENTS (N=448)	
SPAIN	5.8%
FRANCE	4.7%
GREECE	4.2%
ITALY	3.6%
NEW ZEALAND	3.6%
USA	3.6%
THAILAND	3.3%
SOUTH AFRICA	2.5%
EGYPT	2.2%
DOMESTIC RESPONDENTS (N=228)	
NEW ZEALAND	5.7%
GOLD COAST	3.5%
MELBOURNE	3.5%
CAIRNS	3.1%
EUROPE	3.1%
SYDNEY	3.1%
WHITSUNDAYS	2.5%

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

OVERALL RESPONDENTS (N=161)	
EUROPE	34%
NORTH AMERICA (inc. Caribbean)	14%
AUSTRALIA (except Queensland)	13%
QUEENSLAND	12%
NZ, PACIFIC & SOUTH-EAST ASIA	11.5%
AFRICA AND LATIN AMERICA	8.5%
ASIA	3%
INTERNATIONAL RESPONDENTS (N=448)	
EUROPE	45
NORTH AMERICA (inc. Caribbean)	19%
AFRICA AND LATIN AMERICA	12%
NZ, PACIFIC & SOUTH-EAST ASIA	10%
AUSTRALIA	4%
ASIA	3.5%
QUEENSLAND	3%
DOMESTIC RESPONDENTS (N=64)	
QUEENSLAND	30%
AUSTRALIA (except Queensland)	29.5%
EUROPE	12%
NZ, PACIFIC & SOUTH-EAST ASIA	13.5%
NORTH AMERICA (inc. Caribbean)	4.5%
ASIA	2.5%
AFRICA AND LATIN AMERICA	2%

Alternative Destinations Considered

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

DESTINATION	%
NONE	12.1%
NEW ZEALAND	6.7%
MELBOURNE	4.6%
FIJI	3.6%
CAIRNS	3.5%
WHITSUNDAY ISLANDS	3.1%
THAILAND	3.0%
GOLD COAST	2.7%
SYDNEY	2.3%

Motivations

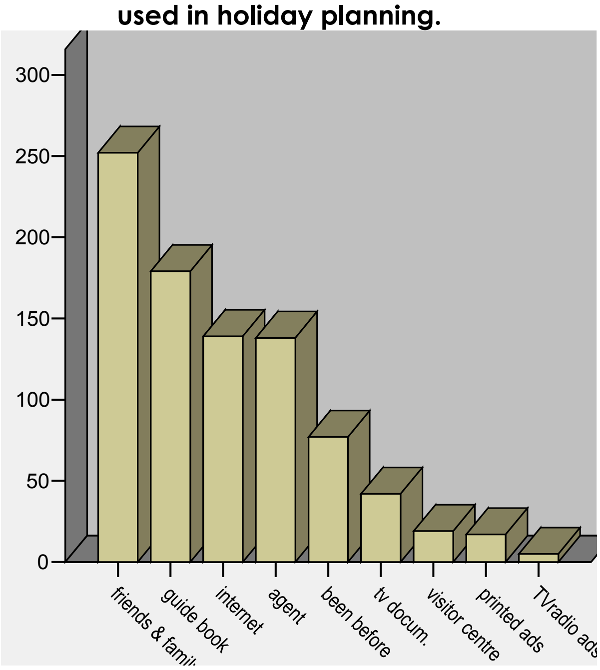
The most **important motivations** (measured on a scle of 1 – not at all important, to 5 – very important) for visiting the region include:

- Visit the Great Barrier Reef ...... 4.65 (mean)
- Snorkelling and diving 4.15
- Rest and relaxation 3.8
- Experience the natural environment... 3.75

Information Sources

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

Figure 3: Information sources used in holiday planning.



Previous Visits

For most respondents (70%), this was their **first visit to the reef**. Of those who had been to the reef before, 50% had been between one and four times before.

Choice of Tourism Operator

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

- Recommended to resondent 44.5%
- Price 18%
- Availability 12%
- Package 10.5%

Diving Profile

When asked if they planned to dive the reef, 36% of respondents said 'Yes'. Six percent of respondents had no previous diving experience; 6% of respondents had completed between one and four dives; 3% of respondents had com-pleted between five and ten dives and 5.5% had completed more than ten dives.

Visits to Other Reefs

Over 44% of the respondents said they had **visited other coral reefs** before coming to the Great Barrier Reef. The most commonly cited alternative destination was the Caribbean (15.5%) or other Australian reefs (15%), sometimes mistaken for other reefs on the GBR. Another 12.5% of respondents had been to the reefs of South-east Asia. The majority of respondents (70%) felt that **other Australian reefs were the same or better,** 54% felt that **South-east Asian reefs are the same or better** and 49% felt that **Caribbean reefs were the same or better.**

Perceptions of the Reef Trip

In deciding order of frequency, **percep-tions of the reef tours** were:

- "A relaxing, fun filled day on the reef" 40%
- "A fantastic reef tour for all" 38.5%
- "Introduction to the reef" 22%

Activities Undertaken

The most common **activities** undertaken during the trip were:

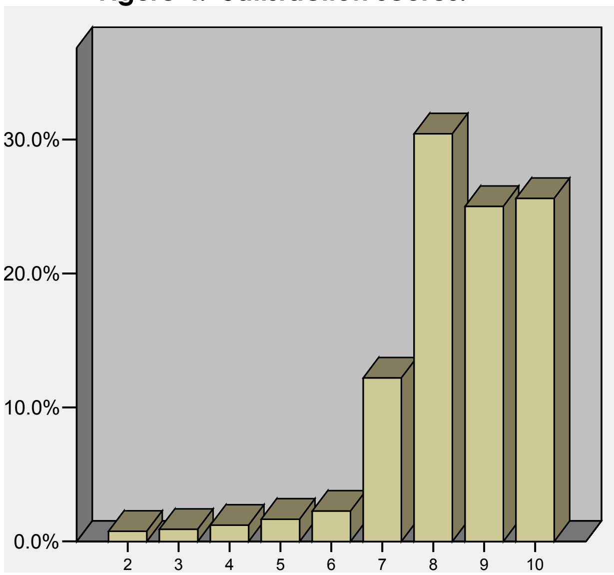
- Snorkelling 75.5%
- Swimming 44%
- Glass-bottom boat reef tour 43%
- Viewing marine animals...................... 24.5%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 – low satisfaction, to 10 – high satisfaction) were generally high, with scores of 9 and 10 accounting for 50.5% of all responses. The mean satisfaction score was 8.4.

Eighty-six percent of respondents felt that they achieved **value for money**, and 90% said that they would **recommend the trip** to others.

Figure 4: Satisfaction scores.



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

- Staff / service / professionalism 26%
- Natural environment 17.5%
- Weather / sea state (sea sick) 10%
- Food and beverages 8.5%

Tourists' **best experiences** include:

- Diving / snorkelling...................................36%
- Marine life 15%
- Coral 11%
- Staff / service / professionalism 9%

Tourists' **worst experiences** include:

- Weather / sea state (sea sick) 21%
- Poor coral / no fish.................................6.7%
- Comfort / safety.....................................5.5%
- Uncomfortable snorkelling / diving.........5%

When asked if the trip met respondents' expectations, the following answers were recorded:

	Reef	Trip
Not at all	1.5%	3%
Not very much	3%	3.5%
Somewhat	31%	28.5%
Very much	60%	60%

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