

**REEF TOURISM
QUARTERLY REPORT # 2
Cairns and Port Douglas
February – April 2007**

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 second quarter of data collection in Cairns and Port Douglas between February and April 2007. A total of 408 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: Results from the first quarter of data collection (November 2006 – January 2007) 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 409 surveys were collected in the first quarter.



1. INTRODUCTION



The research described here falls under MTRSF'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 408 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



During this period, visitor numbers remained the same compared to the first quarter's surveys, despite some operators having to undertake out-of-water maintenance work on their vessels.



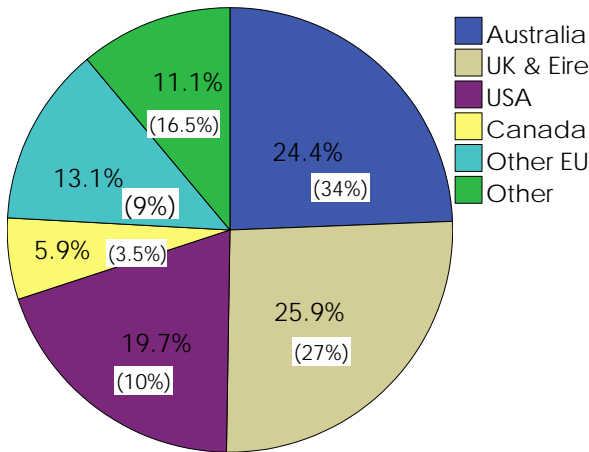
4. FINDINGS



Origin of Respondents

The sample consisted of a similar proportion of males (49.5%) and females (50.5%) as the first quarter. Most respondents were from Australia (24.5%), of which 37.5% were from Queensland.

Figure 1: Origin of respondents (previous quarter figures are provided in brackets).



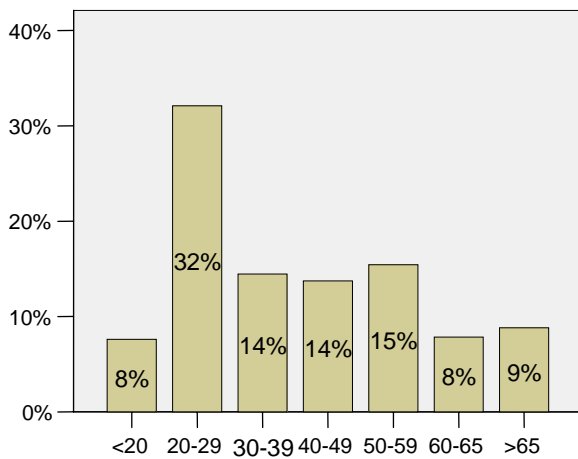
Employment

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

- Professionals..... 21.5% **(27.5%)**
- Students..... 16.5% **(15%)**
- Retired 13.5% **(11%)**
- Self-employed 9% **(11%)**

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were travelling:

- With a partner or spouse 38.5% **(37.5%)**
- With friends 23% **(14.5%)**
- Alone 14.5% **(16%)**
- With family / relatives 11% **(15%)**

Previous Visits

For 83% **(75%)** of respondents, this was their first visit to Far North Queensland. Of those who had visited the region previously, just over half (59%) had visited the region once or twice before.

Accommodation and Transport

Just over a quarter of respondents, 27.5% **(27.5%)**, were staying in backpackers' accommodation and another 31.5% were staying in hotels **(33%)**, whilst holiday apartments and resorts were also popular with 19.5% of respondents staying in the first **(15.5%)** and 9% **(17.5%)** in the latter. The average length of stay was eight nights, with 44% of respondents staying three to five nights. Over half the respondents, 51.5% **(65%)**, flew into the region as their mode of transport; the bus/coach was the next most popular transportation for 25.5% of respondents, and another 15.5% used private vehicles or rented cars to reach the 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=408)	
USA	11.8%
Spain	5.6%
New Zealand	5.4%
France	5.1%
Thailand	4.9%
INTERNATIONAL RESPONDENTS (N=297)	
USA	16.5%
Spain	10.1%
New Zealand	6.1%
France	5.1%
Thailand	4.4%
Canada	3.0%
DOMESTIC RESPONDENTS (N=95)	
USA	6.3%
Gold Coast	6.3%
Thailand	6.3%
Brisbane	5.3%
United Kingdom	5.3%
Sydney	4.2%
Melbourne	4.2%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=408)	
Europe	34% (34%)
North America (including Caribbean)	19.5% (16%)
Australia (except Queensland)	11% (11%)
NZ, Pacific and South-east Asia	13.5% (11%)
Africa and Latin America	9% (12%)
Queensland	8% (9%)
Asia	5% (3%)
INTERNATIONAL RESPONDENTS (N=297)	
Europe	41.5% (43%)
North America (including Caribbean)	23.5% (5%)
NZ, Pacific and South-east Asia	12.5% (18%)
Africa and Latin America	11% (2%)
Australia	4% (5.5%)
Asia	5% (3%)
Queensland	2.5% (5.5%)
DOMESTIC RESPONDENTS (N=60)	
Australia (except Queensland)	31% (27%)
Queensland	22.5% (24%)
NZ, Pacific and South-east Asia	16% (17%)
Europe	12% (9.5%)
North America (including Caribbean)	8.5% (5%)
Asia	5.5% (3%)
Africa and Latin America	4.5% (2%)

Alternative Destinations Considered

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

- New Zealand6.5%
- Melbourne4.3%
- Sydney3.9%
- Whitsundays.....3.9%
- Bali.....3.0%
- Fiji.....3.0%
- Perth.....3.0%

Motivations

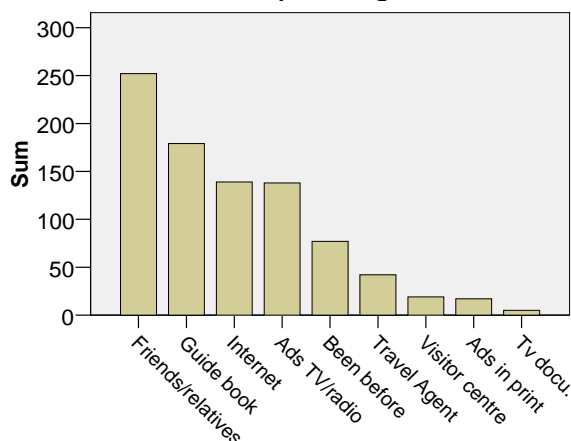
The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef 4.6%* **(4.8%)**
- Snorkelling and diving..... 4.15% **(4.13%)**
- Rest and relax..... 3.77% **(3.8%)**
- Experience natural environ.... 3.74% **(3.8%)**

* Shown as a mean.

Information Sources

Figure 3: Information sources used in planning.



Previous Visits to the Reef

For 69.5% **(72%)** of respondents, this was their first visit to the reef. Of those who had been to the reef before, 97% had been between one and four times before.

Choice of Tour Operator

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

- Recommended by others 17.9%
- Price 14.9% **(15.5%)**
- Recommended by travel agent 14.7%
- Availability 11.1% **(32.5%)**
- Package 9.6% **(9.8%)**
- Advertising 8.7% **(7.5%)**
- Recommended by friend or relative .. 6.4%

Diving Profile

When asked if they planned to dive the reef, 35.5% **(42%)** of respondents said "Yes". 27.5% **(26.5%)** of respondents had no previous diving experience; 28% **(22%)** of respondents had completed between one and four dives; and 15.8% **(6%)** had completed between five and ten dives. A total of 28.7% **(45.5%)** of respondents had completed more than ten dives.

Visits to Other Reefs

Over 44.5% **(50%)** of respondents had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was the Caribbean, mentioned by 15.5% **(17.5%)** of respondents, or other Australian reefs, mentioned by 15% **(10.5%)** of respondents*. Another 10% **(10.5%)** of

respondents had been to the reefs of the Red Sea. Of the respondents who had visited other reefs, 70.7% (**59%**) of respondents felt that other Australian reefs were the same or better, 49% (**47%**) felt that Caribbean reefs were the same or better, and 70% (**70%**) felt that the reefs of the Red Sea 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:

- "A relaxing, fun-filled day on the reef" 40.5% (**33.5%**)
- "A fantastic reef tour for all" ... 38.5% (**40%**)
- "An introduction to the reef" 21% (**22%**)

Activities Undertaken

The most common activities undertaken during the trip were:

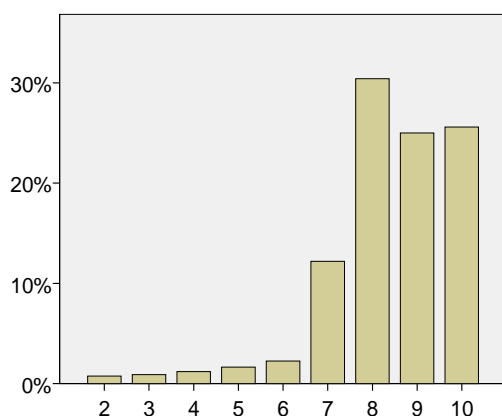
- Snorkelling 75.5% (**67.5%**)
- Swimming 40% (**36%**)
- Glass-bottom Boat 43% (**35%**)
- View marine animals 24.5% (**23%**)

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 50.5% (**51%**) of all responses, and the mean satisfaction score was 8.41 (**8.5**).

Eighty-six percent (**86%**) of respondents felt that they achieved value for money, and 90.5% (91%) said they would recommend the trip to other travellers.

Figure 4: Satisfaction scores.



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

- Staff/service/professionalism... 26.5% (**27%**)
- Natural environment 17.7% (**15.5%**)
- Weather/sea state (sea sick) . 10.3% (**7.5%**)
- Food and beverages 8.8% (**8%**)
- Diving / snorkelling 6.5% (**6.5%**)

Tourists' **best experiences** included:

- Diving/snorkelling 35.5% (**17.2%**)
- Marine life 14% (**6%**)
- Coral 11% (**12%**)
- Staff/service/professionalism 9% (**9%**)

Tourists' **worst experiences** included:

- Weather/sea state (sea sick) .. 21.5% (**66%**)
- None 19.5%
- Poor coral / no fish 6.5% (**6.7%**)
- Comfort / safety 5.5% (**17%**)
- Uncomfortable snorkelling/diving 5% (**19%**)

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

	Reef	Trip
Not at all	1.5% (1%)	3% (0.3%)
Not very much	3% (2.3%)	4% (4%)
Somewhat	32.5% (29%)	30% (27.5%)
Very much	68% (67%)	64% (68.5%)

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