



Project 4.8.6

Analysis of recreational and tourism use and impact on the Great Barrier Reef for managing sustainable tourism



Background

- Annually over 1.9 million tourists visit the GBR. Reef tourism makes a substantial contribution to the regions tourism industry and its prosperity.
- There is a need to understand Reef tourism to enable the identification of key trends and drivers of visitor patterns and economic impacts of visitation
- Iconic GBR species (e.g. sharks, rays, whales, turtles, large fishes) are under increasing threat from human-related sources (e.g. fisheries, climate change)
- These species are of high value to the tourism industry, however the social and economic values of particular species are unknown.
- We need an improved understanding of these species social and economic values for improved management of wildlife populations and marine habitats and to assist in prediction and mitigation of potential local and regional-scale socio-economic impacts associated with species decline or loss





Project objectives

Tourism trends:

- Identify key **Trends & Drivers** of visitor patterns & economic impacts of visitation:
- **TRENDS = *supply and demand* patterns, who is coming to the reef & what are they doing.**
- **DRIVERS = *external, destination image & internal, motivations***

Key species:

Evaluate the social and economic values of Reef species of particular importance to GBR tourists, the tourism industry and the local & regional community, including (but not limited to): Sharks & rays, Whales (e.g. dwarf minke whales), Turtles, Large fishes



Past research on tourism trends: based on Moscardo and CRC reef team

Moscardo's CRC reef team recognised several patterns:

1. *Two distinct market segments*
2. *Changes in market segments*
3. *Different use of the reef by different market segments*
4. *Changes in reef visitation patterns in terms of location and types of boats preferred*
5. *Changes in travel patterns*





Tourism Monitoring: Data Collected from Visitors

1. the socio-demographic characteristics of reef visitors
2. motivations of visitors,
3. travel patterns in each GBR region,
4. activity patterns on the reef,
5. alternative destinations considered,
6. previous reef tourism experience,
7. comparison of the GBR with other reef tourism destinations (both national and international),
8. expectations of the reef and reef trip
9. satisfaction levels with the reef experience,



Tourism Monitoring: Key Outcomes

- Benchmarking of reef tourism experiences
- Identifying changes in reef/GBR use
- Identifying key reef tourism elements
- An understanding of key drivers and trends in reef tourism
- Comparison of the GBR with international reefs
- Assessment of economic influences of visitation

This information is instrumental helping industry ensure sustainable reef tourism experiences as the quality of the reef changes due to climate change





Year one/quarter one results: 667 returned surveys

Some initial results:

- For 70% of respondents this was their first visit to GBR, but 45% had visited other reefs
- Diving profile: 35% planned to dive, 25% actually dived.
- Staff, personal achievements during the day, and seasickness major influences in reef experience
- Viewing marine animals mentioned by less than 25% of respondents as an activity undertaken at the reef, and interpretation/knowledge of staff was mentioned by few respondents as a factor influencing their experience.
- Satisfaction ratings slightly down since 2001 (8.4/10 compared to 8.6/10)
- Recommendation slightly up since 2001.
- GBR did not consistently rate as better than any other reef (tourism experience) in the world.



Future Outputs

- Develop quarterly and annual visitor monitors for the GBR as a whole and for specific regions
- A series of technical reports on drivers and trends, seasonality, segmentation, economic contribution
- Socio economic data can be added to a similar rainforest survey to obtain region wide trends
- Academic papers
- Capacity for rapid response surveys





Key Species: Methods

- GBR tourist visitor surveys (post-wildlife experience, including local expenditure):
 - Pilot study began in Oct 2006 – ongoing surveys through 2007-2009 for different target species (seasonal)
- GBR tourism operator business expenditure survey:
 - Commenced April 2007 – ongoing through rest of 2007



Key Species: Timeline 2006-07

- Oct – Dec 2006: Pilot passenger survey (multi-species) in Far Northern GBR
- Jan - Mar 2007: Analyses of pilot survey & development of Business Expenditure Survey
- April – Sep 2007: Data collection for Business Expenditure Survey
- June – Aug 2007: Passenger survey (minke whales: 1 of 3)
- Aug – Oct 2007: Passenger survey (sharks & large fishes: 1 of 3)
- Oct – Dec 2007: Passenger survey (turtles in Far Northern GBR: 1 of 3)





Expected outcomes: Key Species

- June 2007: Preliminary report of pilot visitor survey (FNGBR; n=90) and business expenditure survey
- June 2008: Preliminary report on social and economic values of sharks, rays and large fishes
- June 2009: Report on social and economic values of dwarf minke whales
- March 2010: Report on social and economic values of marine turtles
- June 2010: Final report on the social and economic values of key marine species



Key Species: Communications

- **To the tourism industry, Reef managers and other project stakeholders:**
 - Consultative meetings, briefings to agencies and regular emails & telephone contact (GBRMPA, QPWS, AMPTO, CHARROA)
 - Bi-annual industry & management workshop presentations (in conjunction with the GBRMPA-funded Dwarf Minke Whale Tourism Monitoring Programme)
- Project 'Info Sheets', updates in other newsletters (e.g. Minke Whale Project Research Newsletters)



Key Species: Project synergies

- **Minke Whale Project evaluation of Quadruple-Bottom-Line sustainability of industry:**
 - Development and evaluation of QBL Sustainability Indicators
 - Minke whale biology & behaviour PhD studies by S. Sobotzick & A. Mangott, leading to development of potential ecological Sustainability Indicators
 - Sustainable management PhD study by M. Curnock, leading to development of potential social & managerial Sustainability Indicators and Adaptive Management Model
 - Incorporation of economic elements by this MTSRF project addresses critical socio-economic sustainability questions



Key Species: Acknowledgements & support

- 2006/07 – 2009/10 funding from MTSRF (\$28k/yr x 4 years)
- Outstanding support and in-kind vessel berths for field data collection from CHARROA dive tourism operators (especially *Undersea Explorer*)
- Excellent support and collaboration with management agencies (GBRMPA, esp. Lisha Mulqueeny, Chris Briggs, Andrew Chin, Kirstin Dobbs & Sarah Salmon; & QPWS, esp. Jesse Low, Saskia Salmeron-Rodriguez & Angela Willett)
- GBR tourism industry access facilitated by links forged by the Minke Whale Project
- In-kind FTE contributions from Chief and Co-Investigators (Birtles, Valentine, Stoeckl & Curnock).





Communication

Newsletter to operators who are assisting with data collection and to members of the Steering Committee	February 2007 June 2007
Steering committee meeting, TBA once GBRMPA have nominated committee member	May 07 (Target)
Quarterly Visitor barometer (Format to be determined). A press release will be issued at the same time as the release of the Barometer. Stakeholder workshops, presenting the results of Research Quarter.	March 2007 June 2007
Publish <i>First Report on the Status and Trends of Visitor Usage of Key Environmental Assets of the GBR</i> . Press release on the report Industry briefings will be given in Cairns and Airlie Beach	August 2007



Future years

Over the next 2 years the project will:

- track changes in reef visitation/visitors, activities and experiences
- investigate the economic value of the reef
- examine specific issues such as seasonality on the reef, competing destinations, comparison of GBR regions, changes in reef experiences and activities undertaken on the reef, etc.
- allow stakeholders to ask about specific issues such environmental concern for the reef, interpretation, eco-certification, etc.

