

Analysis of tourism trends and drivers operating on the GBR

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Project Overview

- With a visitation rate of over 1.5 million tourists/year and an annual direct income of \$1 billion, the importance of tourism on the reef cannot be underestimated.
- This program identifies annual visitor usage patterns of the Great Barrier Reef (GBR) to enable the identification of key trends and drivers of visitor patterns and economic impacts of visitation.

RESEARCH AIMS & OBJECTIVES

- Identification of key trends and drivers of visitor patterns, including assessment of the economic impacts of visitation and comparison of the GBR with international reef tourist attractions.

- TRENDS = *supply and demand patterns, who is coming to the reef and where are they going*, e.g. reported increase of reef visits to Whitsundays, use of smaller boats, more European and repeat visitors, and arrivals in Sydney and departing Cairns (i.e. opportunities to visit the reef before Cairns).
- DRIVERS = *external, destination image* (pull factors), competition from other destinations, economic climate, health of the reef, etc. and *internal, motivations* (push factors), time and financial constraints, experience, expectations and satisfaction, etc.

Project Overview Cont'd

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*

Research Questions

The core areas to be addressed in the research include

- the socio-demographic characteristics
- motivations of visitors,
- travel patterns in each GBR region,
- activity patterns on the reef,
- alternative destinations considered,
- previous reef tourism experience,
- comparison of the GBR with other reef tourism destinations (both national and international),
- expectations of the reef and reef trip
- satisfaction levels with the reef experience,

Key People

- Research Team: Prof. Bruce Prideaux, Dr. Ali Coghlan, Dr. Alastair Birtles, Prof Glenn Ross, Assoc Prof Peter Valentine, Dr Natalie Stoeckl
- Stakeholder groups /end users: Reef tourism industry (AMTPO & independents), GBRMPA, tourism bodies, e.g. TTNQ, Townsville Enterprise.

Methodology

| CORE RESEARCH: | |
|---|---|
| 1. Refine existing segmentation system and identify patterns of use based on socio-demographics, motivations and activities. | REEF TOURIST SURVEYS |
| 2. Identify & analyse alternative destinations considered. | REEF TOURIST SURVEYS |
| 3. Measure satisfaction with reef experiences, including expectations, & critical incidences | REEF TOURIST SURVEYS |
| 4. Factors driving trends of visitation: Images of competing international and national destinations. Negative images of the reef . | LITERATURE REVIEW, REEF TOURIST SURVEYS |

Project Timeframes

| Proposed communication product / event description (and/or title). | Proposed Date |
|--|----------------------------|
| 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 | March 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 |

Key Research Outcomes

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