



## REEF TOURISM QUARTERLY REPORT # 7 Quarter 3, Year 2 | Southern GBR July - September 2008

This quarterly report forms part of a series on reef tourism in the Great Barrier Reef (GBR) produced by James Cook University (JCU) and funded by the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF), which is administered in North Queensland by the Reef and Rainforest Research Centre. The aims and methodology of this research are presented in the introduction below. The data presented in this report summarise the results obtained during the third quarter of the project's second year (N = 34); and the overall results for the period between November 2006 and September 2008 (N = 109). The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

**Note:** To illustrate trends, these data are compared with those collected from the Southern GBR dataset averaged across all quarters. These data are provided in the text in brackets after the figures for this quarter. Blue arrows indicate changes, either increases or decreases in values, from previous quarters.



### 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.

Cairns, Townsville, the Whitsundays, and the Capricorn Coast). 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 34 surveys were conducted in the third quarter of Year 2.

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



### 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/



### 3. LIMITATIONS



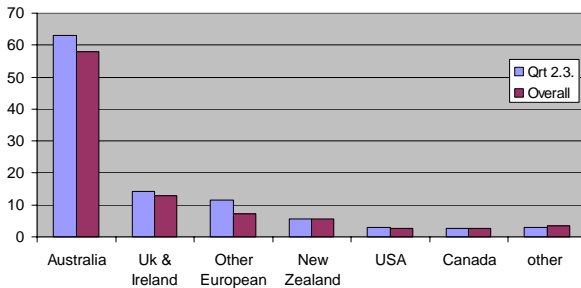
Data from the Asian market have yet to be collected. Sampling bias by crews must also be considered.

## 4. FINDINGS

### Origin of Respondents

This quarter's sample consisted of slightly more men, 51.4% (45.4%;<sup>1</sup>) than women, 48.6% (54.6%). Nearly two thirds of the respondents, 62.9% (58.7%), were from Australia, of which 34.3% were from Queensland (Figure 1).

Figure 1: Origin of respondents.



### Employment

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

	Quarter 3, Year 2	Overall
Self-employed	22.9%	18.3%
Students	17.1%	12.8%
Professionals	11.4%	22.9%
Office worker	8.6%	5.5%
Management	8.6%	8.3%

### Age of Respondents

Respondents in this area of the GBR fell predominantly into the 40-49 year age bracket (Figure 2).

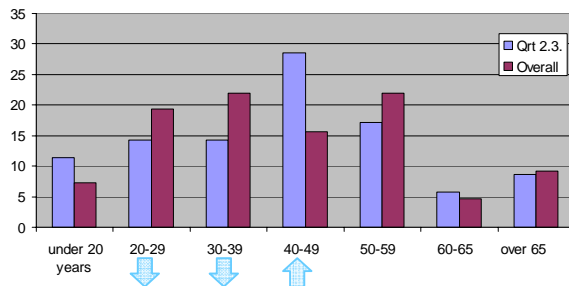
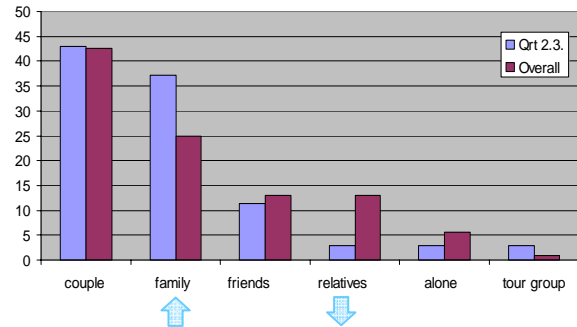


Figure 2: Age of respondents.

### Travel Party

The majority of respondents were travelling as couples or with their family (Figure 3).

Figure 3: Respondents' travel party (%).



### Previous Visits

For 65.7% (69.4 %) of respondents, this was their first visit to the region. The average length of stay was 2-7 (2-7) nights.

### Accommodation and Transport

The majority of respondents stayed in resorts (Figure 4) and flew to the region (Figure 5).

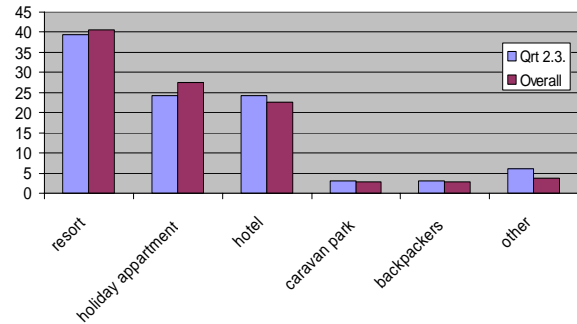


Figure 4: Respondents' choice of accommodation (%).

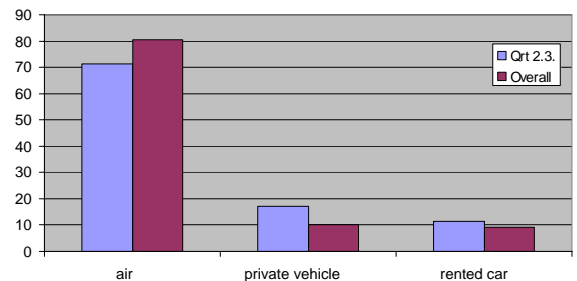


Figure 5: Respondents' choice of transport (%).

<sup>1</sup> Overall GBR sample.

### 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=34)	
New Zealand	11.4%
Spain	11.4%
Byron Bay	5.7%
France	5.7%
INTERNATIONAL RESPONDENTS (N=14)	
New Zealand	28.6%
Mexico	21.4%
Hawaii	14.3%
Thailand	14.3%
DOMESTIC RESPONDENTS (N=20)	
Italy	10.0%
Magnetic Island	10.0%
Victoria	10.0%
Port Stephens	10.0%

A thematic/regional analysis of the same results (last holiday location) shows the following trends:

OVERALL RESPONDENTS (N=34)	
Europe	33.4%
NZ, Pacific and South-east Asia	22.0%
Queensland	22.0%
Australia, excluding Queensland	16.3%
North America (inc. Caribbean)	7.7%
Africa and Latin America	0.0%
INTERNATIONAL RESPONDENTS (N=14)	
NZ, Pacific and South-east Asia	46.2%
Africa and Latin America	23.0%
Europe	15.4%
North America (inc. Caribbean)	15.4%
DOMESTIC RESPONDENTS (N=20)	
Australia, excluding Queensland	40.0%
Queensland	25.0%
Europe	25.0%
NZ, Pacific and South-east Asia	5.0%
North America (inc. Caribbean)	5.0%

### Alternative Destinations Considered

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

Destination	
Cairns	7.0%
Fiji	5.6%
Fraser Island	5.6%
New Zealand	4.2%

### 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 reef, enjoying the natural environment, and rest and relaxation (Figure 6).

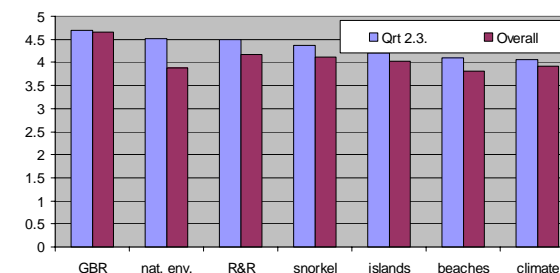


Figure 6: Respondents' motivations to visit the region (mean).

### Information Sources

The sources of information used by respondents when planning their trip to the region are shown in the table below.

	Quarter 3, Year 2	Overall
Internet	42.9%	40.4%
Friends and Relatives, or other	↑ 31.4%	18.3%
Guidebook	14.3%	18.3%
Previous trip	14.3%	14.7%

### Previous Visits to the Reef

For 42.9% (44.9%) 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 3, Year 2	Overall
Availability/proximity	32.3%	36.1%
Price	↑ 32.3%	19.3%
Type and range of activities	↑ 29.0%	12.0%
Recommended by friend / relative, or other	25.8%	22.9%
Destination	22.6%	20.5%
Ecocertification	↑ 19.4%	12.0%

### Diving Profile

When asked if they planned to dive the reef, 28.6% (39.3%) of respondents said yes. 14.3% (20.7%) of these respondents had no previous diving experience, 28.6% (13.7%) had one to four dives, 28.6% (17.1%) had five to 10 dives and 42.9% (48.5%) had more than 10 dives.

### Visits to Other Reefs

Over 35.7% (45.5%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destinations were the South Pacific 22.9% (17.4%), the Red Sea 11.4% (9.2%), and South-east Asia 11.4% (17.4%).

### Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 3, Year 2	Overall
Snorkelling	↓ 78.8%	84.0%
Glass-bottom boat	↓ 57.6%	64.2%
Swimming	↓ 48.5%	59.4%
View marine mammals	↓ 39.4%	51.9%
Diving	↓ 9.1%	29.3%

### 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 64.5% (65.0%) of the all responses. The mean satisfaction score was 8.58 (8.58).

93.8% (89.2%) of respondents felt that they got value for money, and 89.8% (85.3%) said that they would recommend the trip to others.

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

	Quarter 3, Year 2	Overall
Natural environment	↑ 45.8%	37.9%
Staff / service / professionalism	41.7%	36.8%
Weather / sea state (sea sick)	29.2%	31.0%

Diving / snorkelling	↓ 8.3%	16.1%
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Tourists' **best experiences** included:

	Quarter 3, Year 2	Overall
Marine life	52.9%	52.9%
Diving / snorkelling	34.5%	34.5%
Staff / service / professionalism	9.1%	9.5%

Tourists' **worst experiences** included:

	Quarter 2, Year 2	Overall
Weather / sea state (sea sick)	46.7%	44.4%
None	↓ 13.3%	30.2%

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

	Reef		Trip	
Not at all	0.0%	0.0%	0.0%	0.0%
Not very much	6.5%	5.9%	3.3%	5.1%
Somewhat	19.4%	17.8%	23.3%	23.2%
Very much	74.2%	76.2%	73.3%	71.7%

**For further information about this project contact James Cook University:**

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