



REEF TOURISM QUARTERLY REPORT # 8 Quarter 4, Year 2 | Great Barrier Reef Region October – December 2008

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 fourth quarter of data collection from the project's second year (N = 597). The results from the same quarter in the first year of data collection as well as the overall results for the Great Barrier Reef region are provided as a comparison. Results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For purposes of comparison, average results across all respondents from the Great Barrier Reef region are provided in brackets in the text.



1. INTRODUCTION



The research described here falls under the MTSRF 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.



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 three locations

across the Great Barrier Reef (Port Douglas and Cairns, 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 597 surveys were collected for this quarter (October to December 2008).

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).



3. LIMITATIONS



Due to funding issues, data from the Asian market have yet to be collected. Sampling bias by crews must also be

considered and sample size may be limited by the methodology in some instances.



4. FINDINGS



Origin and Gender of Respondents

This quarter's sample did not vary much from the usual pattern of almost equal number of men (42.4%) and women (57.6%). Most respondents, 38.6% (40.8%) were from Australia, of which 15.2% were from Queensland.

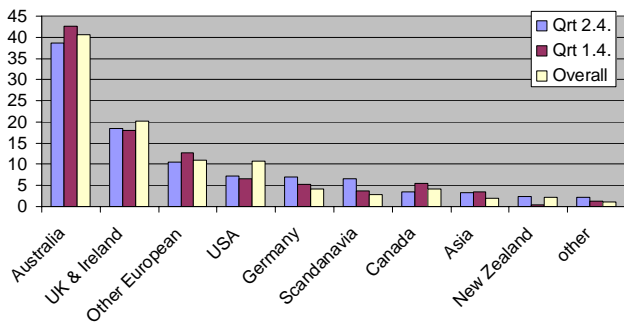


Figure 1: Origin of respondents.

Employment

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

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Professionals	28.8%	28.0%	27.0%
Students	17.6%	15.6%	17.6%
Retired	9.0%	6.9%	8.2%
Self-employed	8.0%	11.5%	8.7%

Age of Respondents

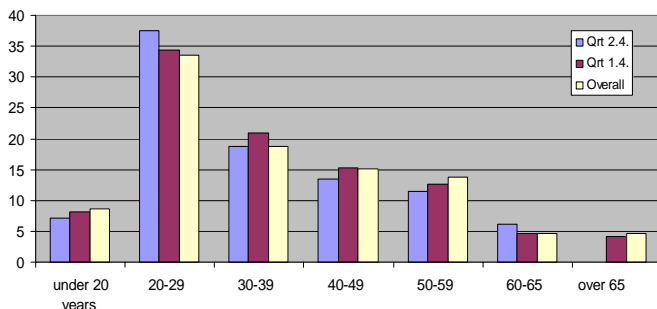


Figure 2: Age of respondents.

Travel Party

The majority of respondents were travelling as a couple, as shown in Figure 3.

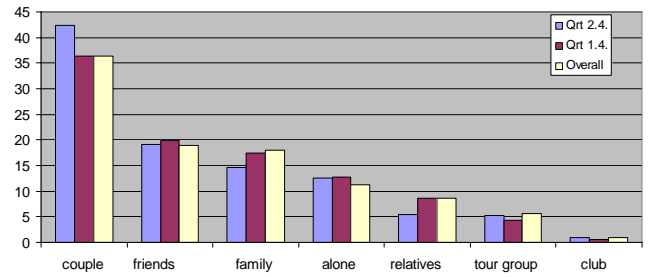


Figure 3: Respondents' travel party (%).

Previous Visits and Length of Stay

For 76.6% (76.4%) of respondents, this was their first visit to the region. The average length of stay was 3-4 (3-5) nights.

Accommodation and Transport

Hotels increased in popularity during this quarter, whilst air travel to the region remained high.

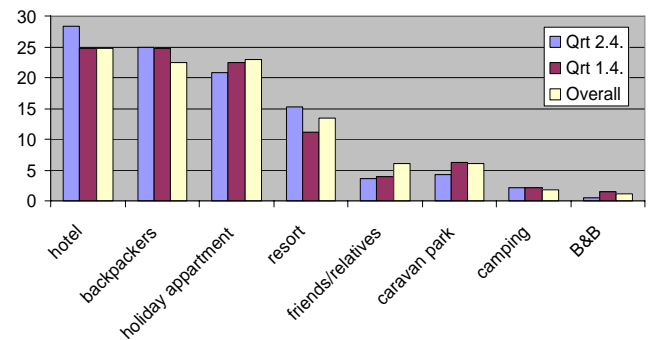


Figure 4: Respondents' choice of accommodation (%).

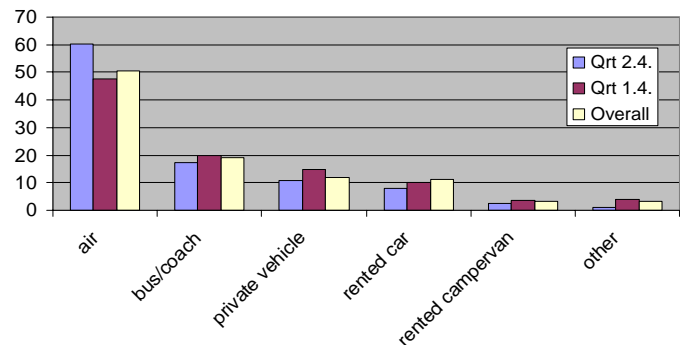


Figure 5: Respondents' choice of transport (%).

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=597)	
New Zealand	6.9%
USA	5.3%
Spain	4.7%
France	4.2%
Gold Coast	3.9%
INTERNATIONAL RESPONDENTS (N=366)	
USA	7.1%
New Zealand	6.3%
Spain	6.3%
Italy	4.9%
Greece	3.6%
DOMESTIC RESPONDENTS (N=229)	
Gold Coast	8.3%
New Zealand	6.6%
Europe	5.2%
Thailand	3.5%
Melbourne	2.6%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=404)	
Europe	31.9%
NZ, Pacific and Southeast Asia	18.9%
Queensland	14.7%
Australia, except Queensland	12.9%
North America (inc. Caribbean)	10.8%
Africa and Latin America	6.5%
Asia	4.2%
INTERNATIONAL RESPONDENTS (N=366)	
Europe	43.4%
NZ, Pacific and Southeast Asia	17.8%
N. America (inc. Caribbean)	14.0%
Africa and Latin America	8.7%
Australia	6.1%
Queensland	5.0%
Asia	5.0%
DOMESTIC RESPONDENTS (N=229)	
Queensland	30.3%
Australia, except Queensland	23.4%
NZ, Pacific and Southeast Asia	20.6%
Europe	13.3%
North America (inc. Caribbean)	6.0%
Asia	3.2%
Africa and Latin America	3.2%

Alternative Destinations Considered

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

Destination	
Sydney	12.2%
New Zealand	10.5%
Fiji	7.5%
Melbourne	6.3%
Gold Coast	6.1%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region are shown in Figure 6.

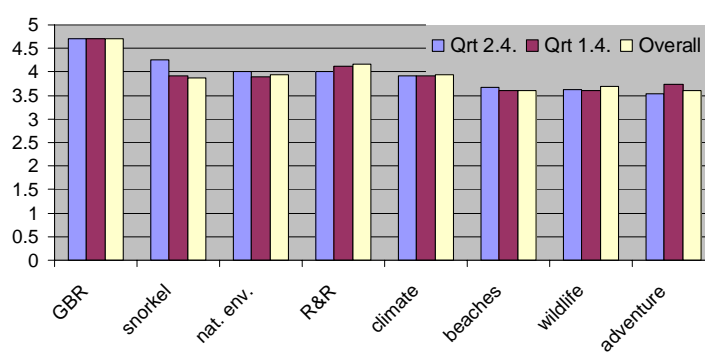


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Friends and Relatives, or other	44.9%	42.1%	42.2%
Internet	30.8%	24.5%	25.0%
Guidebook	27.7%	29.1%	28.9%
Travel agent	18.1%	18.7%	14.6%
Previous trip	13.1%	13.4%	12.1%

Previous Visits to the Reef

For 72.8% (71.1%) of respondents, this was their first visit to the reef.

Choice of Tour Operator

Visitors' most common reason cited for choice of reef tour operator was, as a percentage, recommendation by travel agent.

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Recommended by travel agent	39.9%	23.2%	27.1%
Trip destination	30.9%	6.7%	16.7%
Availability	22.5%	13.2%	14.7%
Price	25.9%	13.0%	17.7%
Recommended by friend / relative / other	17.7%	17.0%	19.2%

Diving Profile

When asked if they planned to dive the reef, 37.6% (38.5%) of respondents said yes. A total of 35.2% (33.3%) of respondents had no previous diving experience, 22.8% (24.0%) had completed one to four dives, 19.9% (14.1%) had completed between five and ten dives and 22.1% (28.6%) had completed more than ten dives previously.

Visits to Other Reefs

Forty-five percent (40.7%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was the Caribbean, 15.4% (10.1%), South-east Asia, 15.2% (14.4%), and the South Pacific, 11.9% (11.0%).

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Snorkeling	82.1%	50.8%	73.8%
Swimming	57.7%	28.7%	47.5%
Glass-bottom boat	36.7%	30.4%	41.4%
View marine mammals	26.13%	39.7%	35.5%
Certified diving	22.0%	13.7%	18.5%
Uncertified diving	10.0%	35.2%	13.2%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, scores of 9 and 10 accounting for 58.1% (53.3%) of all responses, and the mean satisfaction score was 8.62 (8.48).

87.4% (85.8%) of respondents felt that they achieved value for money, and 94.6% (94.0%) said that they would recommend the trip to others).

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

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Staff / service / professionalism	52.9%	56.2%	51.7%
National environment	30.8%	15.6%	25.8%
Diving / snorkeling	18.7%	15.2%	15.2%
Weather / sea state (sea sick)	15.6%	25.1%	23.5%

Tourists' **best experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Diving / snorkeling	50.3%	53.2%	49.5%
Marine life	35.7%	19.4%	35.8%
Staff / service / professionalism	15.1%	15.0%	12.8%

Tourists' **worst experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
None	37.7%	41.5%	32.0%
Weather / sea state (sea sick)	16.6%	23.6%	31.6%

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

	Reef			Trip		
Not at all	0.2%	0.3%	0.7%	0.4%	0.5%	1.0%
Not very much	2.6%	3.4%	3.6%	2.6%	3.3%	3.2%
Somewhat	28.5%	32.2%	32.5%	30.5%	31.8%	31.2%
Very much	67.8%	64.0%	63.2%	66.5%	64.4%	64.6%

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