



REEF TOURISM QUARTERLY REPORT # 8 Quarter 4, Year 2 | Southern 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 (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 fourth quarter of data collection from the project's second year (N = 36). The overall results for the Southern 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 southern Great Barrier Reef region are provided in brackets in the text.



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.



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 36 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 had fewer male respondents (38.9%) than female respondents (61.1%). Most respondents, 66.7% (60.8%) were from Australia, of which 58.8% were from Queensland.

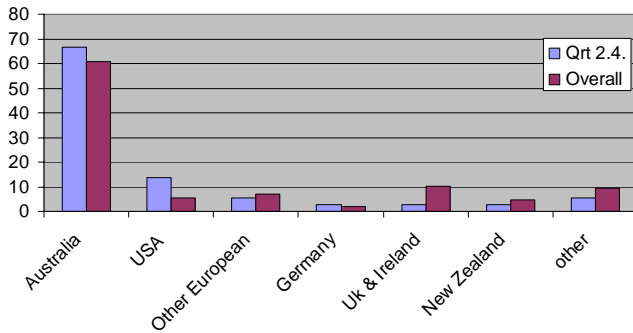


Figure 1: Origin of respondents.

Employment

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

	Quarter 4, Year 2	Overall
Professionals	↑ 36.1%	26.2%
Management	↑ 16.7%	10.3%
Self-employed	13.9%	17.2%
Students	8.3%	11.7%
Retired	8.3%	9.7%

Age of Respondents

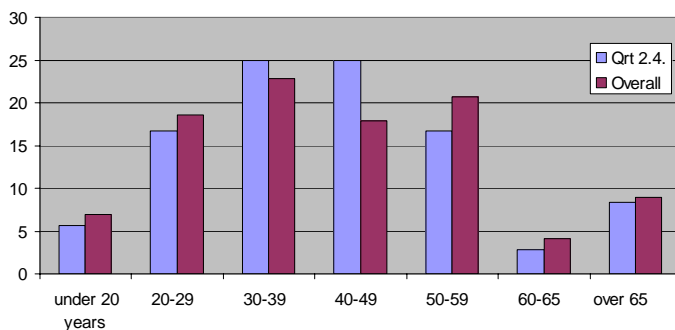


Figure 2: Age of respondents.

Travel Party

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

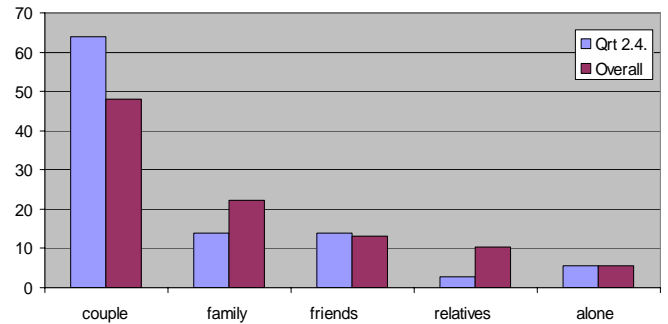


Figure 3: Respondents' travel party (%).

Previous Visits and Length of Stay

For 72.2% (70.6%) of respondents, this was their first visit to the region. The average length of stay was 1-7 nights.

Accommodation and Transport

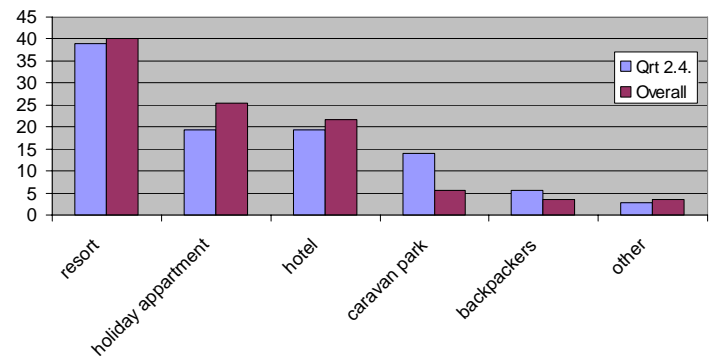


Figure 4: Respondents' choice of accommodation (%).

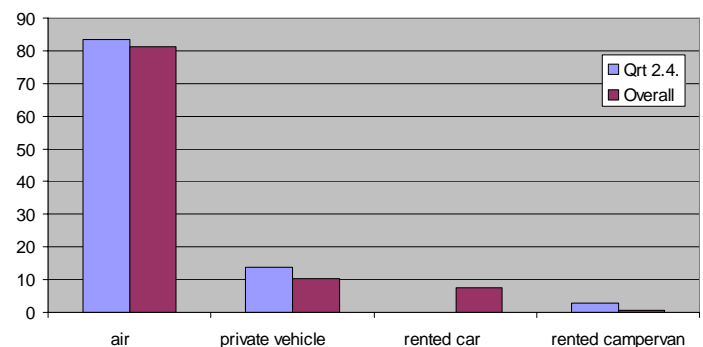


Figure 5: Respondents' choice of transport (%).

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=36)	
Fiji	8.8%
France	5.9%
Fraser Island	5.9%
Lady Elliot Island	5.9%
INTERNATIONAL RESPONDENTS (N=24)	
Portugal	8.5%
Spain	7.4%
DOMESTIC RESPONDENTS (N=12)	
Europe	10.7%
Thailand	10.7%
USA	7.1%
Gold Coast	7.1%
Hawaii	7.1%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=36)	
Queensland	23.5%
NZ, Pacific and Southeast Asia	23.5%
Australia, except Queensland	20.6%
Europe	17.6%
North America (inc. Caribbean)	5.9%
Africa and Latin America	5.9%
Asia	2.9%
INTERNATIONAL RESPONDENTS (N=24)	
Europe	68.2%
NZ, Pacific and Southeast Asia	18.2%
Queensland	4.5%
North America (inc. Caribbean)	4.5%
Africa and Latin America	4.5%
DOMESTIC RESPONDENTS (N=12)	
Queensland	28.6%
NZ, Pacific and Southeast Asia	25.0%
Europe	15.1%
North America (inc. Caribbean)	14.3%
Australia, except Queensland	10.7%
Africa and Latin America	3.6%

Alternative Destinations Considered

The most popular alternative destinations considered when planning this trip are listed in the following table. The importance of island destinations is clear from these results:

Destination	
Whitsundays	9.6%
Fiji	7.6%
Heron Island	5.7%
Vanuatu	5.7%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region focus on the natural environment (including seeing the Great Barrier Reef, generally) (Figure 6):

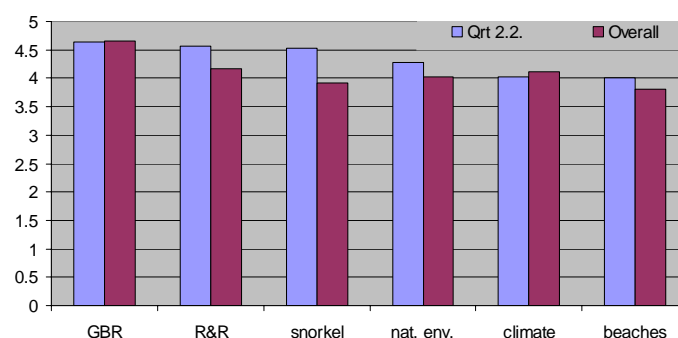


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

Much of the information on the region was gained from the internet and from friends and relatives:




	Quarter 4, Year 2	Overall
Internet	38.9%	40.0%
Friends and relatives, or other	33.3%	33.3%
Guidebook	13.9%	17.4%
Travel agent	11.1%	10.3%
Previous trip	11.1%	13.9%

Previous Visits to the Reef

For 41.7% (44.1%) 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	Overall
Trip destination	54.3%	38.1%
Recommended by friend / relative / other	 31.4%	26.3%
Eco-certification	 25.7%	15.3%
Price	20.0%	19.5%
Availability / accessibility	 17.1%	30.3%

Diving Profile



When asked if they planned to dive the reef, 32.4% (37.6%) of respondents said yes, and all of these visitors had some previous diving experience – 30.0% (18.0%) had completed one to four dives; 30.0% (20.7%) had completed five to ten dives; and 40.0% (61.3%) had completed more than ten dives previously.

Visits to Other Reefs

Over sixty-two percent (50.4%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was the South Pacific, 22.2% (18.6%), the Caribbean, 16.7% (13.8%) and Hawaii, 16.7% (12.4%).

Activities Undertaken

The most common activities undertaken during the trip were:




	Quarter 4, Year 2	Overall
Snorkeling	85.9%	70.4%
Swimming	62.0%	44.0%
Glass-bottom boat	 62.7%	30.6%
View marine mammals 	50.0%	30.4%
Certified diving	17.6%	22.9%
Uncertified diving	85.9%	70.4%

Satisfaction Levels and Recommendations


Satisfaction ratings (measured on a scale of 1 to 10) were generally high, scores of 9 and 10 accounting for 57.2% (63.5%) of all responses, and the mean satisfaction score was 8.60 (8.65).

Eighty-eight percent (85.8%) of respondents felt that they achieved value for money, and 97.2% (94.0%) said they would recommend the trip to others.



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

	Quarter 4, Year 2	Overall
Staff / service / professionalism	 28.6%	34.8%
National / marine environment	 60.7%	43.5%
Diving / snorkeling	14.3%	15.7%
Weather / sea state (sea sick)	 17.9%	27.8%

Tourists' **best experiences** included:

	Quarter 4, Year 2	Overall
Diving / snorkeling	 53.8%	39.1%
Marine life	46.2%	50.9%
Staff / service / professionalism	7.7%	9.1%

Tourists' **worst experiences** included:

	Quarter 4, Year 2	Overall
None	 50.0%	37.3%
Weather / sea state (sea sick)	 15.0%	34.9%

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

	Reef		Trip	
Not at all	0.0%	4.4%	0.0%	3.8%
Not very much	28.6%	20.6%	23.5%	23.3%
Somewhat	71.4%	75.0%	76.5%	72.9%
Very much	0.0%	4.4%	0.0%	3.8%

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