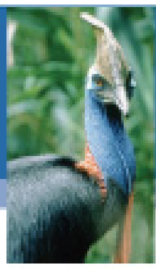

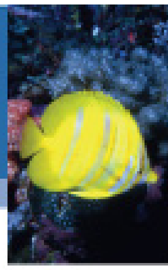


Australian Government
Department of the Environment, Water, Heritage and the Arts

REEF TOURISM
QUARTERLY REPORT # 8
Quarter 4, Year 2 | Whitsundays 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 = 132). Results from the same quarter from the first year of the project, along with the overall results for the Whitsundays 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 Whitsundays 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 132 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

JCU James Cook University
Reef & Rainforest Research Centre

Photo credits: Southern Cassowary, Wet Tropics Management Authority; Hill Inlet in the Whitsundays, Department of Foreign Affairs and Trade - Overseas Information Branch; Butterfly fish, Robert Thorn; Rainforest fruits Wet Tropics Management Authority.

limited by the methodology in some instances.

4. FINDINGS

Origin and Gender of Respondents

This quarter's sample had fewer male respondents (38.5%) than female respondents (61.5%). More than half the respondents, 59.8%, were from Australia, of which 56.7% were from Queensland.

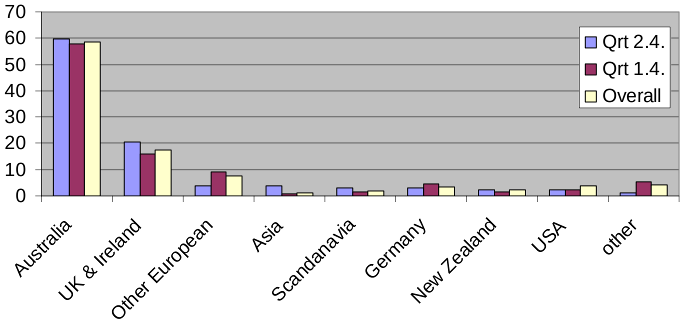

Figure 1: Origin of respondents.

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	28.2%	25.8%	26.5%
Students	16.0%	12.9%	14.7%
Office workers	6.9%	7.6%	8.3%
Retired	6.1%	9.8%	6.8%
Self-employed	6.1%	10.6%	8.5%

Age of Respondents

The largest age cohort for this sample of visitors to the Whitsundays remains the 20-29 year age group (Figure 2).

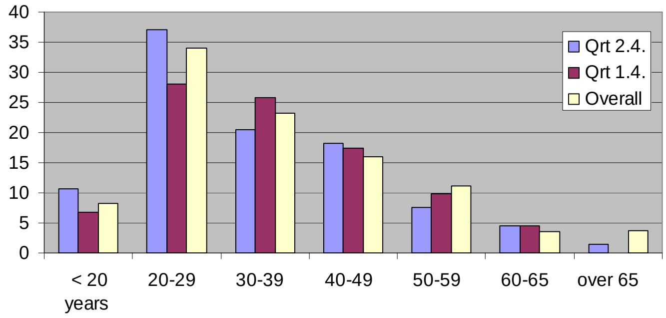

Figure 2: Age of respondents.

Travel Party

The majority of respondents were travelling as a couple, as shown in Figure 3. The number of respondents travelling with relatives has decreased remarkably in this quarter.

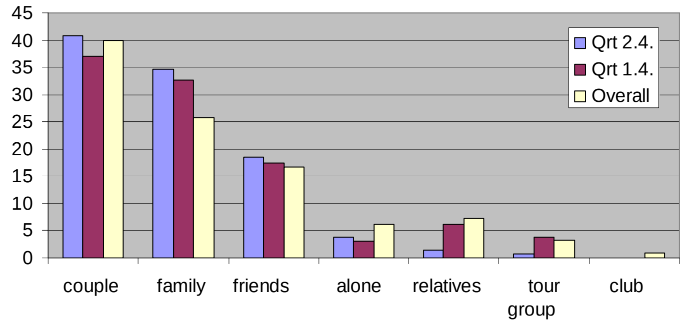

Figure 3: Respondents' travel party (%).

Previous Visits and Length of Stay

For 70.2% (74.8%) of respondents, this was their first visit to the region**.** The average length of stay was 3-7 nights.

Accommodation and Transport

Holiday apartments continue to increase as a popular accommodation choice (Figure 4), whilst over half of the respondents flew into the region (Figure 5).

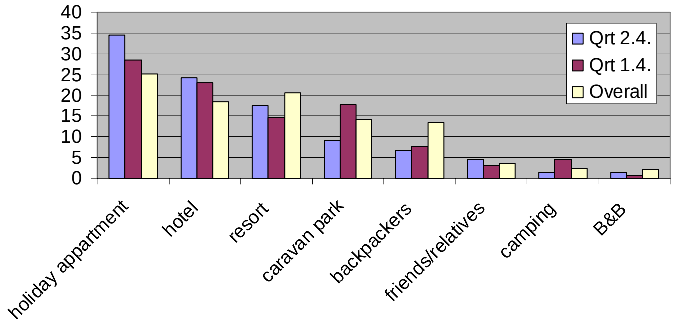

Figure 4: Respondents' choice of accommodation (%).

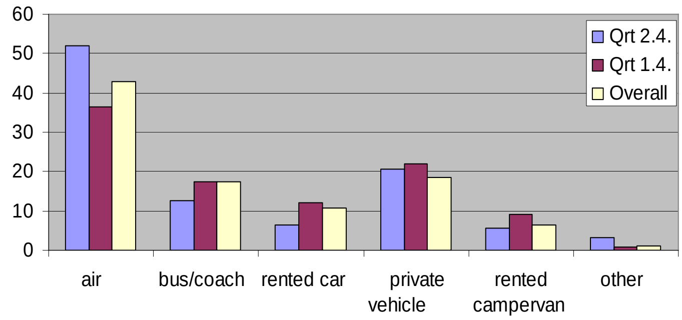

Figure 5: Respondents' choice of transport (%).

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=132)	
Europe	6.3%
Thailand	6.3%
Gold Coast	5.5%
New Zealand	5.5%
Spain	3.9%
INTERNATIONAL RESPONDENTS (N=60)	
France	10.0%
Spain	10.0%
Thailand	6.7%
USA	6.7%
DOMESTIC RESPONDENTS (N=72)	
Gold Coast	10.2%
Whitsundays	10.2%
Europe	8.2%
New Zealand	6.1%
UK	6.1%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=132)	
Europe	30.7%
Queensland	20.5%
NZ, Pacific and Southeast Asia	18.1%
Australia, except Queensland	14.2%
North America (inc. Caribbean)	9.4%
Asia	3.9%
Africa and Latin America	3.1%
INTERNATIONAL RESPONDENTS (N=60)	
Europe	50.0%
NZ, Pacific and Southeast Asia	10.0%
North America (inc. Caribbean)	10.0%
Africa and Latin America	6.7%
Australia	10.0%
Queensland	3.3%
Asia	10.0%
DOMESTIC RESPONDENTS (N=72)	
Queensland	32.7%
Australia, except Queensland	24.5%
NZ, Pacific and Southeast Asia	18.4%
Europe	12.2%
North America (inc. Caribbean)	8.2%
Asia	4.1%

Alternative Destinations Considered

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

Destination	
Fiji	6.7%
New Zealand	6.3%
Sydney	6.3%
Cairns	5.8%
Thailand	5.0%
Gold Coast	4.6%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region included seeing the Great Barrier Reef and rest and relaxation.

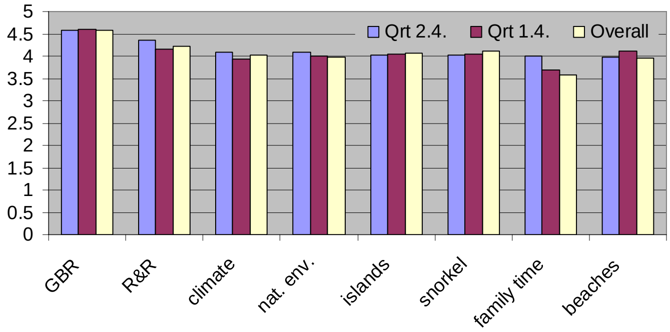

Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

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

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Friends and relatives, or other	47.0%	42.1%	*41.5%*
Internet	28.0%	18.0%	*23.7%*
Guidebook	19.7%	30.8%	*24.5%*
Travel agent	18.2%	10.5%	*11.6%*
Previous trip	17.4%	18.0%	*15.1%*

Previous Visits to the Reef

For 69.0% (67.9%) of respondents, this was their first visit to the reef, indicating little change from previous quarters.

Choice of Tour Operator

Visitors' most common reason cited for choice of reef tour operator was, as a percentage, the intended destination, and recommendations by travel agents. The importance of price as a deciding factor also appears to be increasing in occurrence.

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Trip destination	38.5%	8.3%	*19.8%*
Recommended by travel agent	38.0%	19.8%	*20.2%*
Availability / accessibility	26.9%	19.5%	*18.6%*
Price	17.7%	7.5%	*16.2%*
Recommended by friend / relative / other	10.8%	11.4%	*15.5%*

Diving Profile

When asked if they planned to dive the reef, 28.5% (28.6%) of respondents said yes. Thirty-six percent (41.8%) of respondents had no previous diving experience; 16.0% (27.5%) had completed between one and four dives; 16.0%(10.5%) had completed five to ten dives and 32.0% (40.2%) had completed more than ten dives previously.

Visits to Other Reefs

Forty-one percent (40.3%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destinations were Southeast Asia, 11.3% (11.5%), and the Indian Ocean, 9.8% (7.3%).

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Snorkeling	61.7%	48.2%	70.4%
Glass-bottom boat	58.6%	21.2%	30.6%
View marine mammals	56.7%	33.9%	30.4%
Uncertified diving	33.8%	34.0%	14.2%
Swimming	33.1%	26.8%	44.0%
Certified diving	13.5%	15.1%	22.9%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, scores of 9 and 10 accounting for 50.0% (52.9%) of all responses, and the mean satisfaction score was 8.15 (8.48).

Nearly 77% (85.8%) of respondents felt that they achieved value for money, and 88.8% (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	Quarter 4, Year 1	Overall
Staff / service / professionalism	49.0%	56.0%	*56.3%*
Weather / sea state (sea sick)	25.5%	26.4%	*13.8%*
Diving / snorkeling	16.7%	15.6%	*20.5%*
Natural / marine environment	14.7%	15.9%	*30.9%*

Tourists' **best experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
Diving / snorkeling	57.7%	51.5%	*49.1%*
Marine life	18.5%	25.7%	*36.8%*
Staff / service / professionalism	14.6%	15.2%	*12.9%*

Tourists' **worst experiences** included:

	Quarter 4, Year 2	Quarter 4, Year 1	Overall
None	38.3%	40.2%	*30.7%*
Weather / sea state (sea sick)	20.9%	26.1%	*33.8%*

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

	Reef		Trip	
Not at all	0.8%	0.2%;0.6%;	0.8%	0.5%;0.6.%
Not very much	6.3%	22.6%;3.2%	5.5%	2.6%;3.4%
Somewhat	37.8%	31.6%;32.0%	32.3%	32.9%;32.0%
Very much	55.1%	64.6%;64.2%	61.4%	63.9%;64.0%

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