



Australian Government

Department of the Environment, Water, Heritage and the Arts

## REEF TOURISM QUARTERLY REPORT # 9 Quarter 1, Year 3 | Whitsundays Region January to March 2009

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 first quarter of data collection from the project's third year (January to March 2009) (Qrt 3.1) (N = 82). Results from the same quarter from the second year of the project (Qrt 2.1) (N = 97), along with the overall results for the Whitsundays region since November 2006 (N = 1,062) are provided as a comparison. Results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

**Note:** For comparison, figures from the corresponding quarter in Year 2 (Qrt 2.1) and Year 1 (Qrt 1.1), as well as overall, are provided in graphs, tables and throughout 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 four 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. Currently, ten operators are involved in this research. A total of 82 surveys were collected for this quarter (January to March 2009).

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



Data have not been collected from the Asian markets. Sampling bias by crews must also be considered.



## 4. FINDINGS



### Origin and Gender of Respondents

This quarter's sample did not vary much from the usual pattern of fewer men, 45.1% (43.9% in Qrt 2.1; 42.6% overall) than women, 54.9% (56.1% in Qrt 2.1; 57.4% overall). Over half of the respondents, 58.0% (62.2% in Qrt 2.1; 55.6% overall), were from Australia, of which 22.9% were from Queensland (Figure 1).

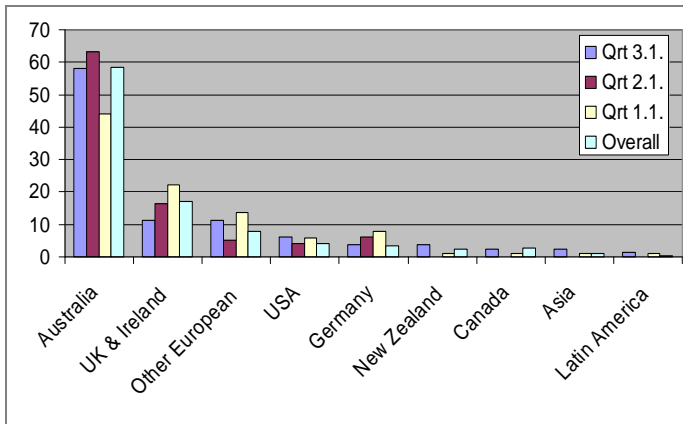


Figure 1: Origin of respondents (%).

### Employment

Respondents were most commonly professionals or students.

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Professionals	29.3%	23.2%	28.8%	26.7%
Students	19.5%	6.1%	22.1%	14.6%
Management	13.4%	11.0%	1.9%	8.2%
Self-employed	12.2%	6.1%	5.8%	8.1%
Retired	6.1%	3.3%	4.8%	7.2%

### Age of Respondents

Respondents in the Airlie Beach area of the Great Barrier Reef fell predominantly into the 20-29 year age group, although this number appears to be decreasing over time.

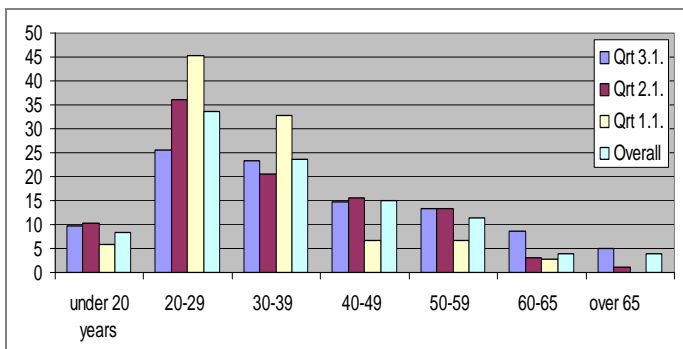


Figure 2: Age of respondents (%).

### Travel Party

The majority of respondents were travelling with their partner (Figure 3).

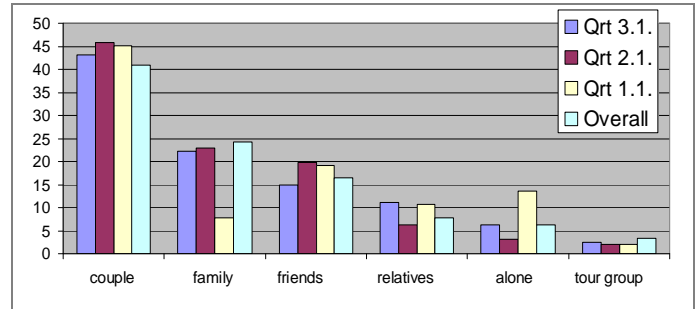


Figure 3: Respondents' travel parties (%).

### Previous Visits and Length of Stay

For 72.8% (69.1% in Qrt 2.1; 76.5% overall) of respondents, this was their first visit to the region. The average length of stay was 3-5 nights (2-5 nights in Qrt 2.1; 2-7 nights overall).

### Accommodation and Transport

Resorts continue to be a popular choice for accommodation in the Airlie Beach region, closely followed by holiday apartments.

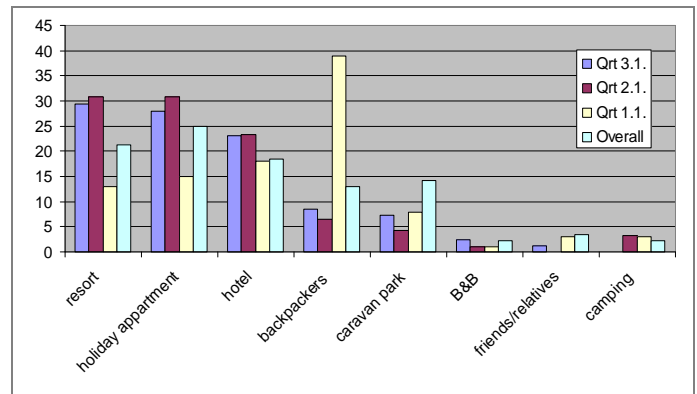


Figure 4: Respondents' choice of accommodation (%).

Air travel to the region remains high, with over seventy percent of respondents saying that they flew to the region.

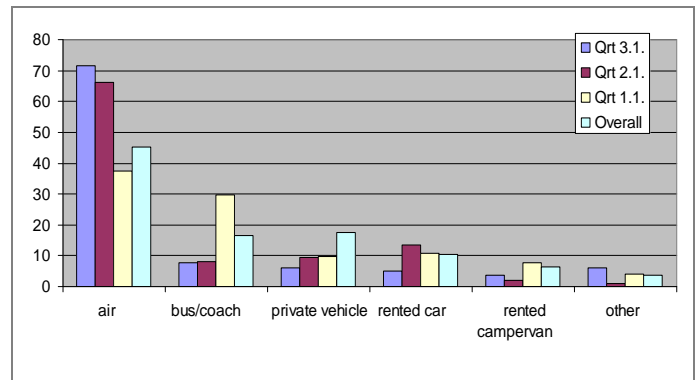


Figure 5: Respondents' choice of transport (%).

### 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. Along with some of the world's most popular destinations, we found that the Gold Coast and Melbourne were also cited by (domestic) respondents.

OVERALL RESPONDENTS (N = 78)	
<b>NB:</b> Four (4) respondents did not complete this section.	
Europe	6.3%
Gold Coast	6.3%
USA	6.3%
France	5.1%
Melbourne	3.8%
INTERNATIONAL RESPONDENTS (N = 33)	
USA	12.1%
France	12.1%
New Zealand	6.1%
DOMESTIC RESPONDENTS (N = 45)	
Gold Coast	11.1%
Europe	8.9%
Melbourne	6.7%
Sydney	6.7%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N = 78)	
<b>NB:</b> Four (4) respondents did not complete this section.	
Australia, excluding Queensland	25.3%
Europe	24.1%
Queensland	20.3%
NZ, Pacific and Southeast Asia	15.2%
North America (inc. Caribbean)	11.4%
Africa and Latin America	2.5%
Asia	1.3%
INTERNATIONAL RESPONDENTS (N = 33)	
Europe	36.4%
North America (inc. Caribbean)	21.2%
NZ, Pacific and Southeast Asia	24.2%
Africa and Latin America	6.1%
Queensland	6.1%
Australia, excluding Queensland	3.0%
Asia	3.0%
DOMESTIC RESPONDENTS (N = 45)	
Australia, excluding Queensland	12.3%
Queensland	31.1%
Europe	13.3%
NZ, Pacific and Southeast Asia	8.9%
North America (inc. Caribbean)	4.4%

### Alternative Destinations Considered

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

Destination	
New Zealand	8.7%
Fiji	8.7%
Cairns	7.0%
Sydney	4.6%
Gold Coast	4.1%
Thailand	4.1%

### Motivations

The most important motivations (measured on a scale of 1 = *not at all important*, to 5 = *very important*) for visiting the region included visiting the Great Barrier Reef, rest and relaxation, and snorkeling (Figure 6).

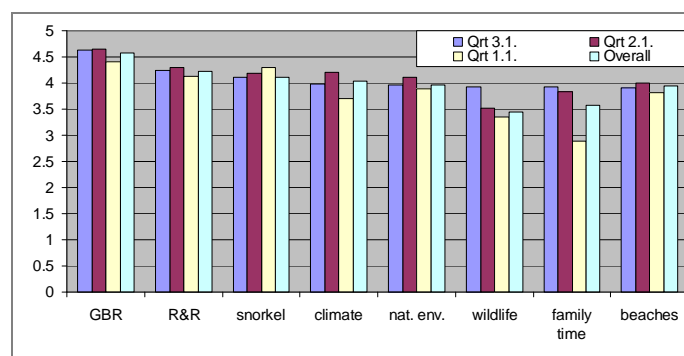


Figure 6: Respondents' motivations to visit the region (mean).

### Information Sources

Word of mouth and the internet are important sources of information about the region for visitors to the Whitsundays.

Info Source	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Friends and relatives	36.6%	37.8%	33.0%	40.4%
Internet / WWW	31.7%	22.0%	25.0%	22.0%
Previous trip / Have been before	15.9%	18.3%	10.2%	13.3%
Guidebook	13.4%	24.4%	30.1%	27.0%
Ads in print	3.7%	4.9%	4.1%	4.7%

### Previous Visits to the Reef

For 78.5% (67.9% in Qrt 2.1; 68.8% overall) of respondents, this was their first visit to the reef.

### Choice of Tour Operator

Visitors' most common reasons cited for choice of reef tour operator was recommendation by a travel agent, which appears to be increasing

in occurrence, whilst operator availability is also important.

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Recommended by travel agent	44.4%	6.9%	12.5%	12.5%
Availability of tour operator	28.4%	11.1%	7.5%	13.9%
Advertising	17.3%	13.4%	12.5%	9.6%
Price	14.8%	17.0%	18.8%	12.6%
Recommended by friend / relative / other	8.6%	18.0%	12.5%	15.8%

### *Diving Profile*

When asked if they planned to dive the reef, 19.8% (26.9% in Qrt 2.1; 29.5% overall) of respondents said yes. Just over thirty-five percent (36.4%) (13.6% in Qrt 2.1; 42.8% overall) of these respondents had no previous diving experience; 27.3% of respondents (31.8% in Qrt 2.1; 25.5% overall) had completed between one and four dives; 9.1% (5.6% in Qrt 2.1; 10.3% overall) had completed between five and ten dives; and only 27.3% (33.2% in Qrt 2.1; 21.4% overall) had completed more than ten dives.

### *Visits to Other Reefs*

Over thirty-five percent (39.7% in Qrt 2.1; 41.7% overall) of respondents said they had visited other coral reefs before visiting the Great Barrier Reef. Previous reef experiences occurred most commonly in Hawaii (12.2%) (6.1% in Qrt 2.1; 5.7% overall), the South Pacific (9.8%) (4.9% in Qrt 2.1; 8.4% overall), the Caribbean (8.5%) (5.1% in Qrt 2.1; 7.4% overall), and the Red Sea (8.5%) (5.1% in Qrt 2.1; 10.1% overall).

### *Activities Undertaken*

The most common activities undertaken during the trip were:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Snorkelling	85.2%	78.0%	80.8%	78.0%
Glass-bottom boat tour	70.4%	81.7%	55.8%	65.5%
Viewing marine animals	36.6%	65.9%	56.7%	56.4%
Swimming	59.3%	51.2%	52.9%	51.4%
Diving	16.1%	22.4%	26.9%	31.3%

### *Satisfaction Levels and Recommendations*

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, scores of 9 and 10 accounting for 46.9% (52.9% in Qrt 2.1; 46.8% overall) of all responses, and the mean satisfaction score was 8.35 (8.54 in Qrt 2.1; 8.34 overall).

Seventy-two percent (85.8% in Qrt 2.1; 81.4% overall) of respondents felt that they achieved value for money, and 90.2% (86.6% in Qrt 2; 89.3% overall) said they would recommend the trip to others.

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

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Staff / service	44.6%	54.8%	44.3%	48.6%
Natural environment	18.9%	11.9%	35.2%	31.7%
Weather / sea state	36.5%	19.0%	21.6%	30.1%
Diving / snorkelling	16.0%	9.5%	17.0%	16.1%

Tourists' **best experiences** included:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Diving / snorkeling	52.8%	60.5%	47.8%	54.8%
Marine life	26.4%	23.3%	36.7%	26.0%
Staff / service	8.3%	14.0%	14.4%	17.3%

Tourists' **worst experiences** included:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Weather / sea state / sea sick	52.2%	14.3%	31.3%	35.4%
None	13.0%	46.9%	14.1%	30.9%

Overall, the vast majority of respondents' expectations were met to some extent. Very few respondents' expectations were not met.

	Reef		Trip Overall	
Not at all	0.0%	2.5% in Qrt 2.1; 1.6% overall	0.0%	2.6% in Qrt 2.1 3.3% overall
Not very much	7.4%	3.8% in Qrt 2.1 5.8% overall	3.7%	2.6% in Qrt 2.1 4.0% overall
Somewhat	46.9%	26.6% in Qrt 2.1 38.2% overall	45.1%	28.2% in Qrt 2.1 32.8% overall
Very much	45.7%	67.1% in Qrt 2.1 54.4% overall	51.2%	66.6% in Qrt 2.1 59.9% overall

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