



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 9 Quarter 1, Year 3 | GBR 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 = 360). Results from the same quarter from the second year of the project (Qrt 2.1) (N = 600), along with the overall results for the Great Barrier Reef region since November 2006 (N = 3,417) 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 360 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, 42.7% (46.8% in Qrt 2.1; 44.6% overall) than women, 57.3% (53.2% in Qrt 2.1; 55.4% overall). The largest group of respondents (38.7%) (39.6% in Qrt 2.1; 40.1% overall) were from Australia (Figure 1), of which 24.5% were from Queensland.

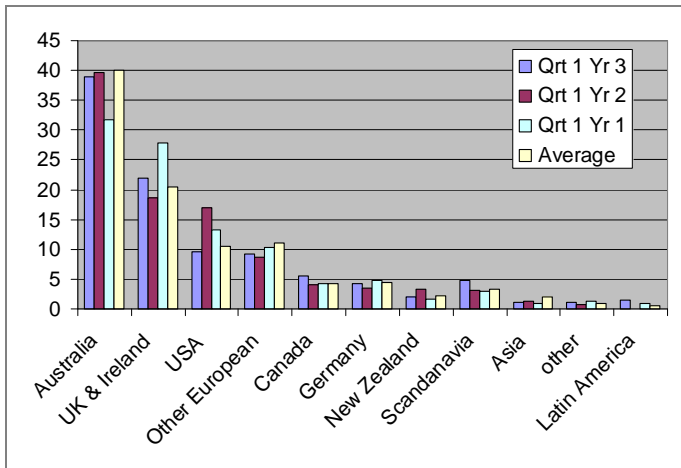


Figure 1: Origin of respondents (%).

Employment

In terms of employment, many respondents were professionals or students.

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Professionals	30.8%	23.0%	22.0%	27.3%
Students	17.8%	19.2%	16.8%	17.7%
Self-employed	12.7%	8.3%	8.5%	9.0%
Retired	9.6%	9.4%	12.0%	8.1%
Management	7.6%	7.2%	8.5%	8.2%

Age of Respondents

Respondents in the GBR region were generally young - mainly falling into the 20-29 year age group.

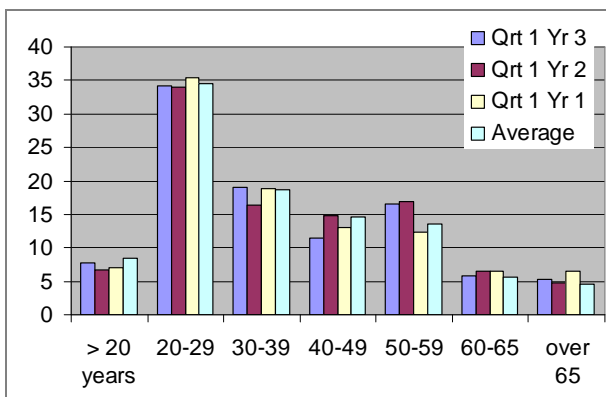


Figure 2: Age of respondents (%).

Travel Party

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

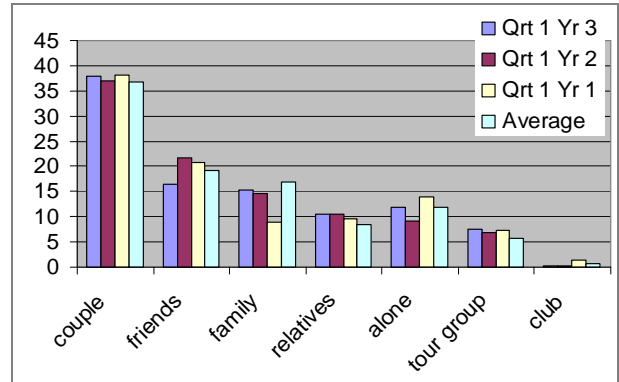


Figure 3: Respondents' travel parties (%).

Previous Visits and Length of Stay

For 78.7% (76.2% in Qrt 2.1; 76.8% overall) of respondents, this was their first visit to the region. The average length of stay was 2-5 nights (3-5 nights in Qrt 2.1; 3-5 nights overall).

Accommodation and Transport

Hotels were a popular choice for respondents in the GBR region, as were holiday apartments.

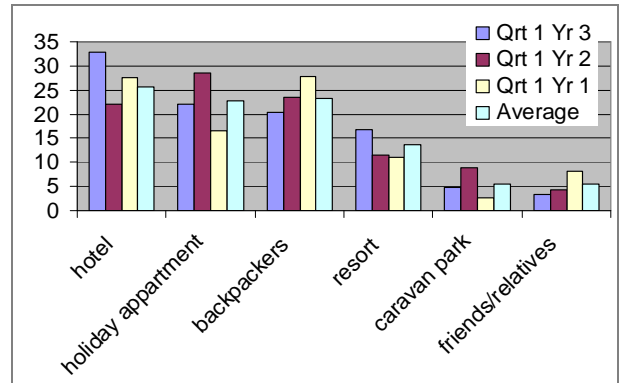


Figure 4: Respondents' choice of accomm. (%).

Air travel remains the most popular form of transport to the region.

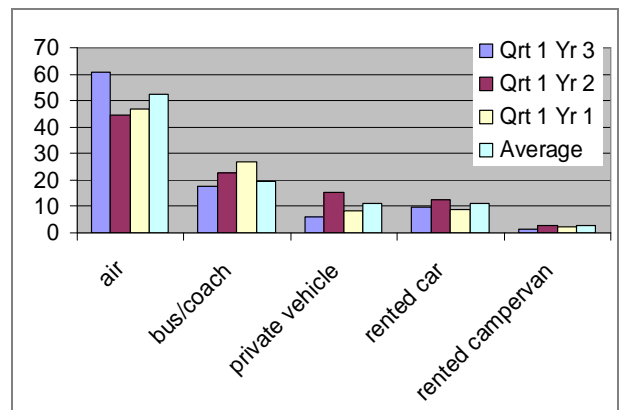


Figure 5: Respondents' choice of transport (%).

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.

OVERALL RESPONDENTS (N = 360)	
USA	9.3%
New Zealand	6.1%
France	4.6%
Gold Coast	3.5%
Thailand	3.2%
INTERNATIONAL RESPONDENTS (N = 210)	
USA	13.8%
New Zealand	7.6%
France	6.7%
Spain	4.8%
Italy	4.3%
Thailand	3.3%
DOMESTIC RESPONDENTS (N = 150)	
Gold Coast	9.1%
Europe	7.6%
Sydney	7.6%
Cairns	3.8%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N = 360)	
Europe	28.3%
Australia, excluding Queensland	14.6%
NZ, Pacific and Southeast Asia	16.9%
North America (inc. Caribbean)	14.5%
Queensland	12.5%
Africa and Latin America	8.2%
Asia	5.0%
INTERNATIONAL RESPONDENTS (N = 210)	
Europe	39.0%
North America (inc. Caribbean)	19.4%
NZ, Pacific and Southeast Asia	18.6%
Africa and Latin America	11.9%
Asia	6.2%
Queensland	2.4%
Australia, excluding Queensland	1.9%
DOMESTIC RESPONDENTS (N = 150)	
Australia, excluding Queensland	35.4%
Queensland	27.3%
NZ, Pacific and Southeast Asia	14.6%
Europe	10.8%
North America (inc. Caribbean)	6.2%
Asia	2.3%
Africa and Latin America	1.5%

Alternative Destinations Considered

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

Destination	
New Zealand	8.3%
Sydney	6.2%
Fiji	4.5%
Thailand	4.5%
Gold Coast	4.3%
USA	3.7%
Cairns	3.4%
Brisbane	3.2%
Whitsundays	3.0%

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, and snorkeling and diving (Figure 6).

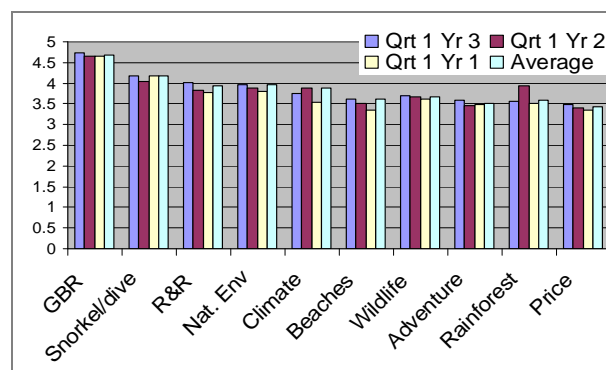


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

World of mouth recommendations, based on information provided by family and friends, remains a consistently important source of information to tourists visiting the region.

Info Source	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Friends and relatives	39.0%	42.0%	39.4%	42.4%
Internet / WWW	30.6%	19.6%	22.6%	25.8%
Guidebook	26.7%	29.5%	32.2%	29.0%
Travel agent	20.3%	13.2%	11.3%	15.3%
Have been before	10.9%	13.2%	10.1%	12.0%

Previous Visits to the Reef

For 77.7% (72.9% in Qrt 2.1; 71.9% 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 included:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Recommended by travel agent	47.1%	17.5%	20.4%	29.7%
Type and range of activities	24.4%	7.2%	6.8%	17.7%
Price	23.0%	11.3%	13.5%	18.7%
Availability	22.1%	7.8%	9.5%	15.6%
Package	21.8%	6.8%	7.9%	11.4%
Recommended by friend / relative / other	17.4%	15.9%	21.3%	18.7%
Advertising	17.0%	10.3%	8.1%	11.8%

Diving Profile

When asked if they planned to dive the reef, 36.0% (34.7% in Qrt 2.1; 38.7% overall) of respondents said yes. Forty-nine percent (36.9% in Qrt 2.1; 34.6% overall) of respondents had no previous diving experience; 24.0% (12.1% in Qrt 2.1; 24.8% overall) of visitors had completed between one and four logged dives; eleven percent (7.1% in Qrt 2.1; 13.7% overall) had completed between five and ten logged dives; and 26.0% (31.8% in Qrt 2.1; 26.9% overall) of visitors had completed more than ten logged dives.

Visits to Other Reefs

Forty-two percent (44.6% in Qrt 2.1; 44.9% overall) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. Previous reef experiences occurred mostly in the Caribbean (21%) (19.2% in Qrt 2.1; 11.2% overall), Southeast Asia (12.8%) (13.6% in Qrt 2.1; 14.3% overall) and Hawaii (12.0%) (13.2% in Qrt 2.1; 9.9% overall).

Activities Undertaken

The most common activities undertaken during the trip were:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Snorkelling	84.3%	77.0%	72.5%	74.7%
Swimming	55.7%	47.8%	44.0%	48.2%
Glass-bottom boat tour	41.7%	42.1%	41.3%	40.8%
Diving	33.5%	37.2%	38.7%	29.7%
Viewing marine animals	27.9%	47.5%	36.4%	35.9%

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 54.7% (51.5% in Qrt 2.1; 53.6% overall) of all responses. The mean satisfaction score was 8.59 (8.43 in Qrt 2.1; 8.50 overall).

Just over 86% (85.1% in Qrt 2.1; 85.7% overall) of respondents felt that they achieved value for money, and 95.3% (85.1% in Qrt 2.1; 93.8% 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	49.8%	51.6%	50.6%	47.7%
Weather / sea state	21.4%	27.8%	22.5%	21.1%
Diving / snorkeling	20.3%	15.4%	14.9%	15.6%
Natural environment	16.7%	26.9%	31.3%	24.6%

Tourists' best experiences included:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Diving / snorkeling	49.6%	46.1%	51.5%	44.6%
Marine life	35.0%	27.2%	25.4%	29.5%
Staff / service	9.6%	11.0%	12.6%	11.8%

Tourists' worst experiences included:

	Qrt 3.1	Qrt 2.1	Qrt 1.1	Overall
Weather / sea state / sea sick	33.8%	37.9%	30.1%	26.2%
None	20.9%	30.3%	21.7%	24.7%

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

	Reef		Trip Overall	
Not at all	0.3%	1.3% in Qrt 2.1; 0.7% overall	0.3%	0.9% in Qrt 2.1 0.9% overall
Not very much	3.9%	4.1% in Qrt 2.1 3.6% overall	1.2%	2.4% in Qrt 2.1 3.1% overall
Somewhat	34.4%	31.2% in Qrt 2.1 32.5% overall	33.6%	33.3% in Qrt 2.1 31.4% overall
Very much	61.4%	63.2% in Qrt 2.1 63.2% overall	64.9%	63.4% in Qrt 2.1 64.6% overall

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