



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 10 Quarter 2, Year 3 | Whitsundays Region April to June 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 second quarter of data collection from the project's third year (April to June 2009) (Qrt 3.2) (N = 337). Results from the same quarter from the second year of the project (Qrt 2.2) (N = 114), along with the overall results for the Whitsundays region since November 2006 (N = 1,371) 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 2.2) and Year 1 (Qrt 1.2), 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.

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 337 surveys were collected for this quarter (April to June 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).



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



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 consisted of fewer men, 40.7% (42.5% in Qrt 2.2; 41.9% overall) than women, 59.3% (57.5% in Qrt 2.2; 58.1% overall). Less than half of the respondents, 44.8% (68.4% in Qrt 2.2; 55.3% overall), were from Australia, of which 16.2% were from Queensland (Figure 1).

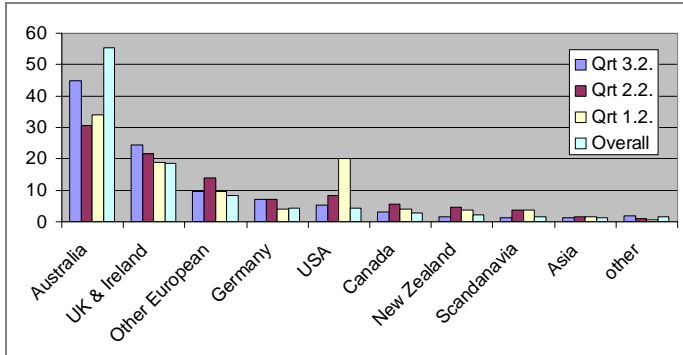


Figure 1: Origin of respondents (%).

Employment

In terms of employment, the most common occupations recorded were 'professionals', who made up a quarter of the overall sample.

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Professionals	25.4%	21.1%	23.2%	26.1%
Self-employed	11.7%	14.0%	6.1%	9.6%
Management	6.9%	13.2%	11.0%	8.3%
Students	18.6%	7.9%	6.1%	16.0%
Service industry	4.2%	7.0%	6.1%	4.9%
Retired	2.4%	7.0%	13.4%	5.9%

Age of Respondents

Respondents in the Airlie Beach area of the Great Barrier Reef fell predominantly into the 20-29 year age group (Figure 2).

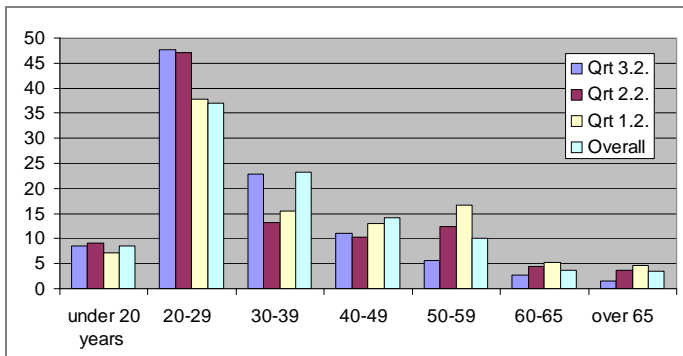


Figure 2: Age of respondents (%).

Travel Party

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

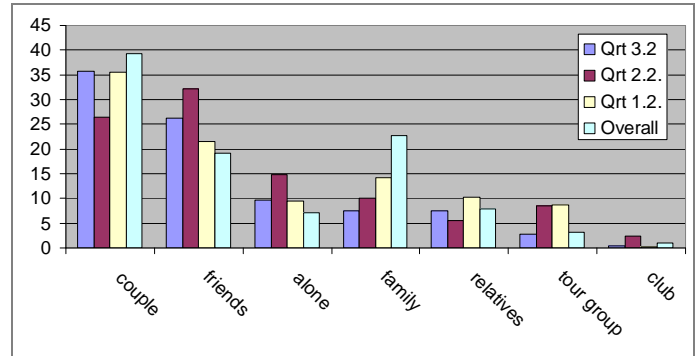


Figure 3: Respondents' travel parties (%).

Previous Visits and Length of Stay

For 79.5% (75.5% in Qrt 2.2; 75.7% overall) of respondents, this was their first visit to the region. The average length of stay was 2-5 nights (2-7 nights in Qrt 2.2; 2-7 nights overall).

Accommodation and Transport

Most respondents stayed in backpackers' hostels or holiday apartments (Figure 4), and most visitors flew into the region (choice of transport, Figure 5).

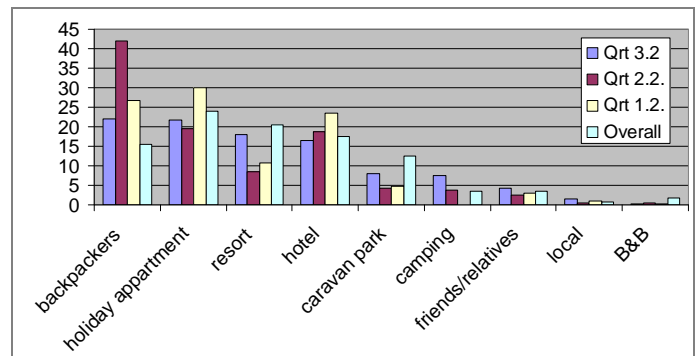


Figure 4: Respondents' choice of accommodation (%).

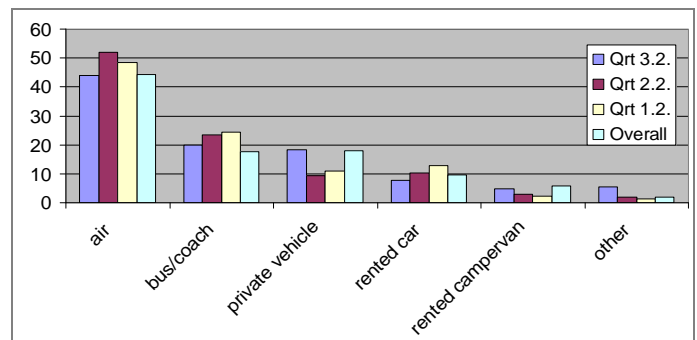


Figure 5: Respondents' choice of transport (%).

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. New Zealand remains a popular response.

OVERALL RESPONDENTS (N = 319)	
New Zealand	7.2%
Thailand	5.9%
Gold Coast	4.0%
Spain	3.7%
INTERNATIONAL RESPONDENTS (N = 178)	
New Zealand	7.9%
Spain	6.2%
Fraser Island	5.6%
Thailand	5.6%
France	5.1%
DOMESTIC RESPONDENTS (N = 141)	
Gold Coast	8.5%
Thailand	6.4%
New Zealand	5.7%
Sydney	3.5%
Melbourne	3.5%

A thematic/regional analysis of these same results shows that Australia (including Queensland) accounts for over half the responses:

OVERALL RESPONDENTS (N = 319)	
Queensland	27.9%
Australia, excluding Queensland	24.4%
Europe	18.3%
North America (inc. Caribbean)	13.0%
NZ, Pacific and Southeast Asia	10.0%
Africa and Latin America	5.0%
Asia	1.8%
INTERNATIONAL RESPONDENTS (N = 178)	
Europe	22.2%
Queensland	19.4%
NZ, Pacific and Southeast Asia	19.4%
North America (inc. Caribbean)	16.7%
Australia, excluding Queensland	11.1%
Africa and Latin America	5.6%
Asia	5.6%
DOMESTIC RESPONDENTS (N = 141)	
Australia, excluding Queensland	30.2%
Queensland	29.5%
NZ, Pacific and Southeast Asia	18.7%
Europe	10.1%
Asia	5.8%
North America (inc. Caribbean)	4.3%
Africa and Latin America	1.4%

Alternative Destinations Considered

The most popular alternative destinations considered when planning this trip were popular beach holiday or coastal destinations, for example, Cairns, Thailand and Fiji, as well as New Zealand.

Destination	
Cairns	7.3%
Thailand	7.3%
New Zealand	6.9%
Fiji	6.2%

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, enjoying the climate and visiting the islands (Figure 6).

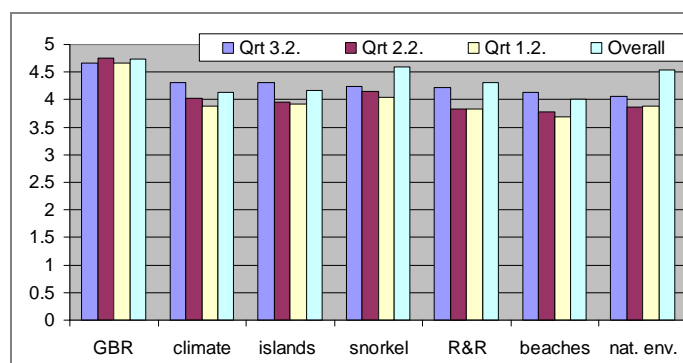


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

The sources of information used by respondents when planning their trip to the region are shown in the table below. Word of mouth was most frequently cited as a source of information on the region.

Info Source	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Friends and relatives	55.1%	40.4%	37.8%	44.6%
Internet / WWW	28.7%	29.8%	22.0%	25.1%
Guidebook	27.8%	17.5%	24.4%	24.6%
Have been before	8.7%	17.5%	18.3%	14.0%

Previous Visits to the Reef

For 68.0% (65.5% in Qrt 2.1; 68.3% overall) of respondents, this was their first visit to the reef.

Choice of Tour Operator

Visitors' most common reasons cited for choice of tour operator are shown in the table below.

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Recommended by travel agent	43.5%	34.2%	8.3%	27.1%
Destination	34.8%	39.6%	2.8%	23.9%
Availability	24.2%	26.1%	11.1%	20.4%
Package	27.3%	25.2%	11.1%	17.8%
Price	24.8%	20.7%	18.1%	18.4%

Diving Profile

When asked if they planned to dive the reef, 33.3% (19.6% in Qrt 2.2; 28.1% overall) of respondents said yes. Of these respondents, 31.8% (53.8% in Qrt 2.2; 38.8% overall) had no previous diving experience, 44.9% (23.1% in Qrt 2.2; 32.5% overall) had completed between one and four dives; 11.6% (15.4% in Qrt 2.2; 11.2% overall) had completed between five and ten dives; and 11.7% (7.7% in Qrt 2.2; 17.5% overall) had completed more than ten dives.

Visits to Other Reefs

Over 43.7% (44.2% in Qrt 2.2; 41.0% overall) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destinations were Southeast Asia 13.6% (12.3% in Qrt 2.2; 11.7% overall), Hawaii 9.2% (10.5% in Qrt 2.2; 7.8% overall) and the South Pacific 8.3% (19.3% in Qrt 2.2; 10.0% overall).

Activities Undertaken

The most common activities undertaken during the trip were snorkelling and swimming.

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Snorkelling	86.5%	84.2%	78.0%	82.4%
Swimming	68.9%	61.4%	51.2%	58.9%
Viewing marine animals	58.6%	38.1%	65.9%	52.6%
Glass-bottom boat tour	44.9%	66.4%	81.7%	61.2%
Visiting islands	37.5%	24.4%	18.3%	27.4%
Diving	21.9%	20.9%	24.4%	20.6%

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 51.1% (63.2 in Qrt 2.2; 50.3% overall) of the all responses. The mean satisfaction score was 8.51 (8.74 in Qrt 2.2; 8.67 overall).

Just over eighty percent (81.5%) (79.8% in Qrt 2.2; 81.1% overall) of respondents felt that they achieved value for money, and 96.6% (89.4% in Qrt 2.2; 93.6% overall) said that they would recommend the trip to others.

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

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Staff / service	41.5%	42.1%	50.7%	42.4%
Natural environment	33.8%	14.0%	27.5%	25.2%
Weather / sea state	27.0%	13.2%	23.2%	24.1%
Diving / snorkelling	21.8%	6.1%	10.1%	14.9%

Tourists' best experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Diving / snorkeling	47.2%	38.6%	44.0%	46.7%
Marine life	33.1%	17.5%	18.7%	26.9%
Staff / service	7.7%	9.6%	12.0%	11.1%

Tourists' worst experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Weather / sea state / sea sick	23.5%	22.8%	39.0%	28.1%
None	23.8%	19.3%	26.8%	23.1%

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

	Reef		Trip Overall	
Not at all	1.9%	0% in Qrt 2.2; 1.4% overall	0.6%	0% in Qrt 2.2; 2.0% overall
Not very much	3.8%	4.4% in Qrt 2.2; 5.1% overall	3.8%	4.8% in Qrt 2.2; 3.7% overall
Somewhat	35.4%	24.3% in Qrt 2.2; 36.7% overall	33.7%	20.0% in Qrt 2.2; 33.0% overall
Very much	58.9%	71.3% in Qrt 2.2; 56.8% overall	61.9%	75.2% in Qrt 2.2; 61.4% overall

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