



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 10 Quarter 2, Year 3 | GBR 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 = 975). Results from the same quarter from the second year of the project (Qrt 2.2) (N = 580), along with the overall results for the Great Barrier Reef region since November 2006 (N = 6,470) 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.



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 975 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).



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, 42.5% (46.8% in Qrt 2.2; 44.3% overall) than women, 57.5% (53.2% in Qrt 2.2; 55.7% overall). Over one-third of the respondents, 38.0% (39.6% in Qrt 2.2; 40.1% overall), were from Australia, of which 25.1% were from Queensland (Figure 1).

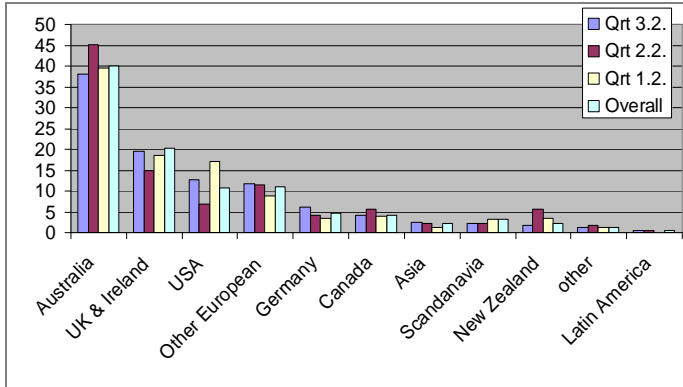


Figure 1: Origin of respondents (%).

Employment

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

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Professionals	26.8%	23.1%	23.0%	27.1%
Students	18.7%	25.5%	19.2%	17.9%
Self-employed	10.5%	7.6%	5.8%	9.1%
Management	7.9%	8.6%	7.2%	8.1%
Retired	5.5%	7.2%	9.4%	7.8%

Age of Respondents

Respondents in the GBR region predominantly fell into the 20-29 year age group (Figure 2).

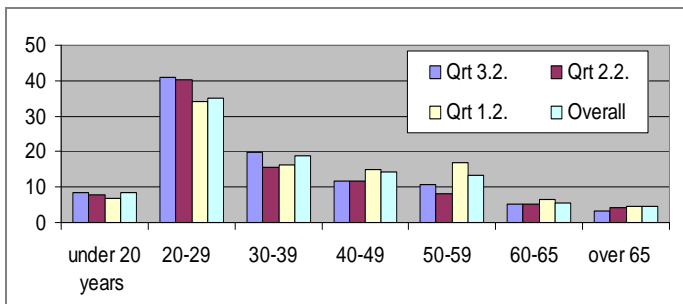


Figure 2: Age of respondents (%).

Travel Party

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

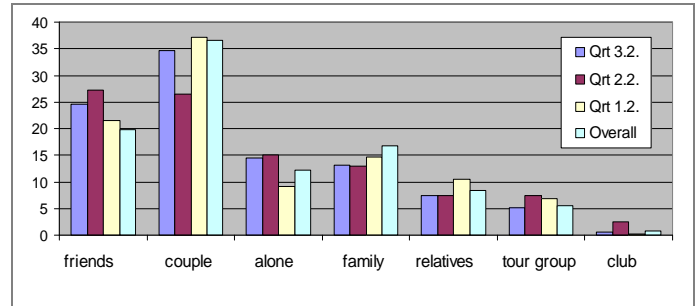


Figure 3: Respondents' travel parties (%).

Previous Visits and Length of Stay

For 74.9% (75.3% in Qrt 2.2; 77.0% overall) of respondents, this was their first visit to the region. The average length of stay was 2-5 (2-5 in Qrt 2.2; 2-7 overall) nights.

Accommodation and Transport

Backpackers' hostels have declined in popularity since Qrt 2.2 as an accommodation choice (Figure 4), whilst air travel remains popular as a transport (Figure 5) choice.

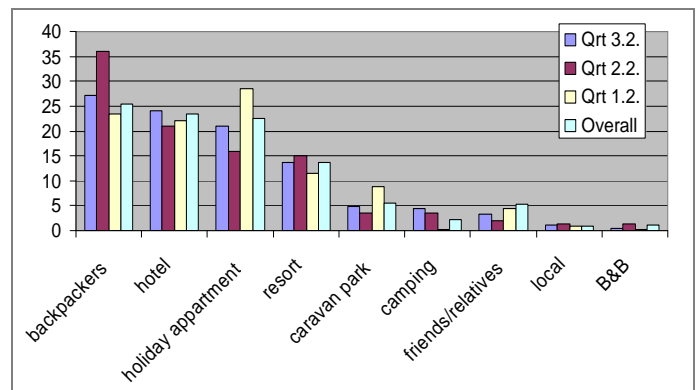


Figure 4: Respondents' choice of accomm. (%).

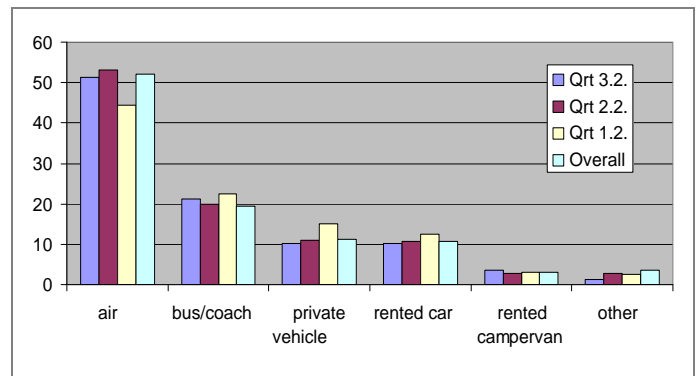


Figure 5: Respondents' choice of transport (%).

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 = 914)	
New Zealand	7.6%
Spain	4.2%
Thailand	4.1%
USA	3.6%
Gold Coast	3.0%
INTERNATIONAL RESPONDENTS (N = 567)	
New Zealand	7.4%
Spain	6.5%
USA	5.1%
Thailand	4.2%
DOMESTIC RESPONDENTS (N = 347)	
Gold Coast	7.8%
New Zealand	7.8%
Thailand	3.5%
Sydney	3.5%

A thematic/regional analysis of the same results shows the following trends:

OVERALL RESPONDENTS (N = 914)	
Europe	23.9%
Australia, excluding Queensland	19.2%
NZ, Pacific and Southeast Asia	18.6%
North America (inc. Caribbean)	13.8%
Queensland	11.6%
Africa and Latin America	6.5%
Asia	6.3%
INTERNATIONAL RESPONDENTS (N = 567)	
Europe	32.8%
NZ, Pacific and Southeast Asia	20.2%
North America (inc. Caribbean)	17.9%
Africa and Latin America	9.4%
Australia, excluding Queensland	8.2%
Asia	6.7%
Queensland	4.8%
DOMESTIC RESPONDENTS (N = 347)	
Australia, excluding Queensland	37.6%
Queensland	23.0%
NZ, Pacific and Southeast Asia	19.2%
Europe	9.6%
Asia	5.5%
Africa and Latin America	1.8%

Alternative Destinations Considered

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

Destination	
New Zealand	6.47%
Fiji	5.03%
Thailand	4.46%
Sydney	3.95%
Cairns	3.54%

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, snorkeling and enjoying the climate (Figure 6).

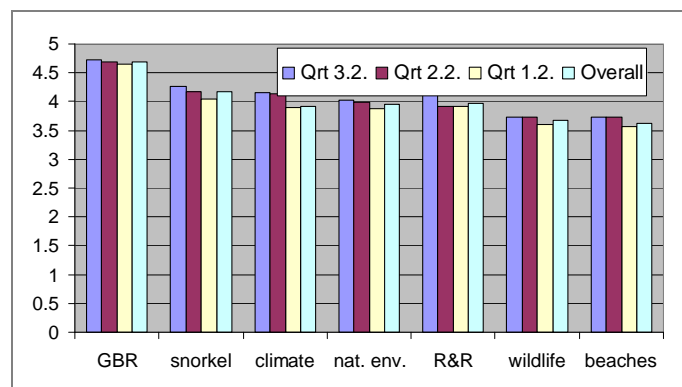


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

The sources of information used by respondents when planning their trip to the region are shown in the table below.

Info Source	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Friends and relatives	49.5%	41.2%	42.0%	43.2%
Internet / WWW	30.2%	30.1%	19.6%	26.0%
Guidebook	29.9%	34.3%	29.5%	28.9%
Travel agent	16.8%	14.5%	13.6%	15.3%
Have been before	10.9%	12.1%	13.2%	11.9%

Previous Visits to the Reef

For 71.6% (69.7% in Qrt 2.2; 71.7% 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 3.2	Qrt 2.2	Qrt 1.2	Overall
Recommended by travel agent	42.1%	36.0%	19.5%	30.8%
Price	30.1%	15.4%	7.6%	20.0%
Availability	21.2%	12.1%	11.4%	16.3%
Recommended by friend / relative / other	18.7%	19.1%	17.6%	18.9%
Advertising	17.5%	13.4%	12.5%	12.3%

Diving Profile

When asked if they planned to dive the reef, 42.2% (41.3% in Qrt 2.2; 39.0% overall) of respondents said yes. Of these respondents, 31.6% (43.0% in Qrt 2.2; 33.9% overall) had no previous diving experience; 27.5% (25.4% in Qrt 2.2; 24.7% overall) had completed between one and four dives; 14.2% (11.4% in Qrt 2.2; 14.1% overall) had completed between five and ten dives; and 26.7% (20.2% in Qrt 2.2; 27.3% overall) had completed more than ten dives.

Visits to Other Reefs

A total of 50.1% (45.0% in Qrt 2.2; 45.6% 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 the Caribbean 17.7% (13.8% in Qrt 2.2; 11.8% overall), Southeast Asia 16.0% (11.2% in Qrt 2.2; 14.6% overall) and Hawaii 12.6% (9.3% in Qrt 2.2; 10.2% overall).

Activities Undertaken

The most common activities undertaken during the trip were:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Snorkelling	78.3%	75.0%	77.0%	75.0%
Swimming	56.1%	52.8%	47.8%	49.3%
Viewing marine animals	48.6%	32.4%	47.5%	37.1%
Diving	39.2%	43.5%	37.2%	40.2%
Glass-bottom boat tour	31.8%	32.7%	42.1%	39.9%

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 55.6% (51.5% in Qrt 2.2; 53.7% overall) of the all responses. The mean satisfaction score was 8.49 (8.29 in Qrt 2.2; 8.50 overall).

A total of 85.5% (79.0% in Qrt 2.2; 85.5% overall) of respondents felt that they achieved value for money, and 97.0% (87.2% in Qrt 2.2; 94.1% overall) said they would recommend the trip to others.

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

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Staff / service	47.4%	36.3%	51.6%	47.4%
Natural environment	29.1%	20.3%	26.9%	25.4%
Weather / sea state (seasick)	23.6%	15.8%	27.8%	21.4%
Diving / snorkeling	21.0%	9.2%	15.4%	16.0%

Tourists' best experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
Diving / snorkeling	49.0%	28.0%	46.1%	44.8%
Marine life	36.2%	28.3%	31.3%	30.1%
Staff / service	10.2%	6.6%	11.0%	11.6%

Tourists' worst experiences included:

	Qrt 3.2	Qrt 2.2	Qrt 1.2	Overall
None	26.2%	13.8%	30.3%	24.7%
Weather / sea state (seasick)	23.7%	21.7%	37.9%	25.9%

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

	Reef		Trip Overall	
Not at all	1.0%	0.2% in Qrt 2.2; 0.7% overall	0.5%	0.6% in Qrt 2.2; 0.9% overall
Not very much	4.2%	3.8% in Qrt 2.2; 3.7% overall	3.3%	3.9% in Qrt 2.2; 3.1% overall
Somewhat	30.6%	31.1% in Qrt 2.2; 32.4% overall	31.6%	29.9% in Qrt 2.2; 31.4% overall
Very much	64.2%	64.9% in Qrt 2.2; 63.2% overall	64.6%	65.7% in Qrt 2.2; 64.6% overall

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