



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 11 Quarter 3, Year 3 | Great Barrier Reef July to September 2009

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 third quarter of data collection from the project's third year (July to September 2009) (Qrt 3.3) (N = 544). Results from the same quarter from the second year of the project (Qrt 2.3) (N = 601), along with the overall results for the Great Barrier Reef region since November 2006 (N = 7,034) 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 2.3) and Year 1 (Qrt 1.3), as well as overall, are provided in graphs, tables and throughout 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 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 544 surveys were collected for this quarter (July to September 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.



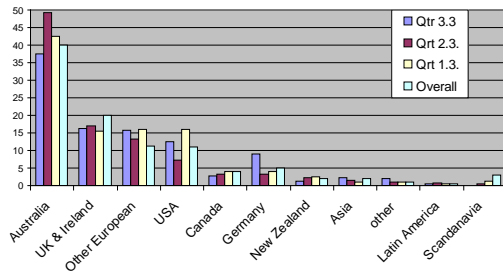
4. FINDINGS



Origin of Respondents

This quarter's sample consisted of slightly fewer men, 47.1% (41.6%;¹ 44.5%;²) than women, 52.9% (58.4%;¹ 55.5%²). Over one third of the respondents, 37.5% (49.3%;¹ 39.9%²), were from Australia, of which 25.7% 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):

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Professionals	26.9%	27.3%	28.3%	27.1%
Students	18.7%	20.8%	17.1%	18.0%
Self-employed	10.2%	9.7%	6.8%	9.2%
Management	8.3%	7.3%	8.6%	8.1%
Public service	8.2%	6.8%	7.6%	5.9%

Age of Respondents

Respondents in this area of the GBR fell predominantly into the 20-29 year age bracket (Figure 2).

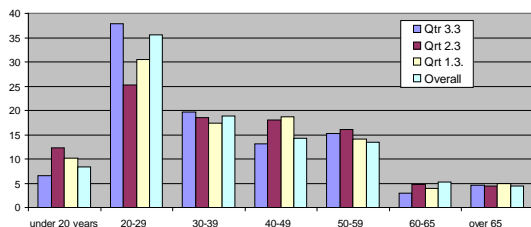


Figure 2: Age of respondents.

Travel Party

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

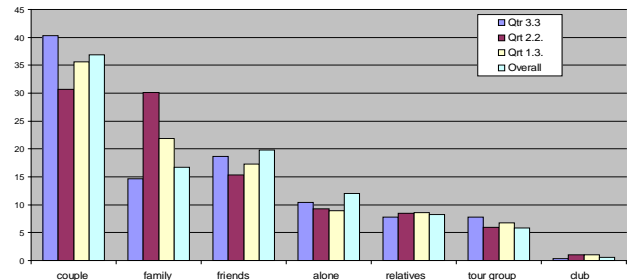


Figure 3: Respondents' travel party (%).

Previous Visits

For 75.8% (76.3%;¹ 76.9 %²) of respondents, this was their first visit to the region. The average length of stay was 2-7 (3-7;¹ 2-7²) nights.

Accommodation and Transport

Hotels are the most preferred of accommodation in this quarter, representing a change from this same quarter last years (Figure 4). Air transport remains popular as in previous quarters (Figure 5).

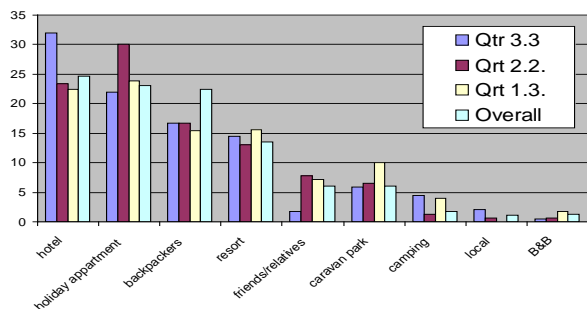


Figure 4: Respondents' choice of accommodation (%).

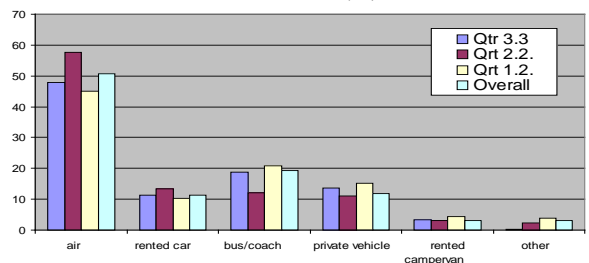


Figure 5: Respondents' choice of transport (%).

¹ Quarter 3, Year 2.

² Overall sample.

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=532)	
France	3.0%
USA	4.3%
New Zealand	3.6%
Gold Coast	3.4%
INTERNATIONAL RESPONDENTS (N=332)	
USA	6.9%
Spain	4.8%
Italy	3.6%
France	3.3%
New Zealand	2.7%
DOMESTIC RESPONDENTS (N=200)	
Gold Coast	9.0%
New Zealand	4.5%
Europe	3.5%
NSW	3.5%

A thematic/regional analysis of the same results (last holiday location) shows the following trends:

OVERALL RESPONDENTS (N=532)	
Europe	26.8%
Australia, excluding Queensland	21.7%
Queensland	11.9%
NZ, Pacific and South-east Asia	12.1%
North America (inc. Caribbean)	16.0%
Africa and Latin America	7.3%
Asia	4.1%
INTERNATIONAL RESPONDENTS (N=332)	
Europe	39.6%
North America (inc. Caribbean)	19.8%
NZ, Pacific and South-east Asia	14.9%
Africa and Latin America	13.2%
Australia	6.6%
Queensland	5.0%
Asia	3.0%
DOMESTIC RESPONDENTS (N=200)	
Australia, excluding Queensland	43.3%
Queensland	24.0%
NZ, Pacific and South-east Asia	15.8%
Europe	8.8%
North America (inc. Caribbean)	3.5%
Africa and Latin America	3.5%
Asia	1.2%

Alternative Destinations Considered

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

Destination	
Sydney	9.1%
New Zealand	6.8%
Cairns	2.9%
Fiji	4.8%
Darwin	2.5%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include visiting the reef, enjoying the climate and snorkelling (Figure 6).

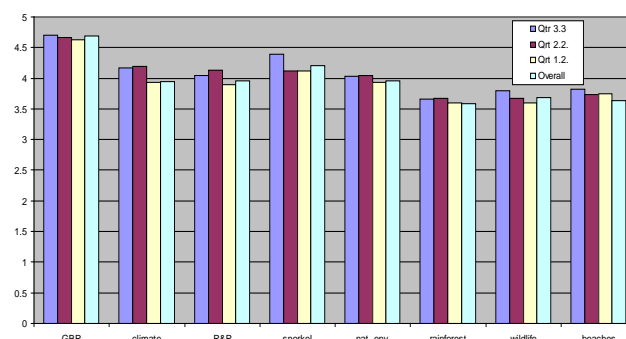


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

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

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Friends and Relatives, or other	38.8%	42.9%	45.3%	41.7%
Guidebook	29.9%	23.6%	31.9%	29.0%
Internet	31.1%	28.2%	20.0%	24.2%
Travel Agent	17.2%	17.0%	13.2%	14.3%
Previous trip	14.0%	14.0%	12.8%	12.0%

Previous Visits to the Reef

For 71.5% (70.6%¹; 71.7%²) respondents this was their first visit to the reef.

¹ Quarter 3, Year 2.

² Overall sample.

Choice of Tour Operator

Visitors' most common reasons for choosing their reef tour operator were:

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Recommended by agent	43.1%	41.0%	19.9%	25.4%
Trip Destination	28.8%	27.7%	3.4%	10.2%
Availability	23.5%	24.1%	11.9%	13.8%
Price	21.9%	22.3%	12.3%	16.7%
Recommended by friend / relative, or other	20.6%	15.5%	6.6%	7.6%

Diving Profile

When asked if they planned to dive the reef, 36.1% (33.8%⁵; 38.8%⁶) of respondents said yes. 33.3% (43.0%¹; 34.0%²) of these respondents had no previous diving experience, 25.9% (25.4%¹; 24.8%²) had one to four dives, 15.5% (11.4%¹; 14.2%²) had five to 10 dives and only 25.3% (20.2%¹; 27.0%²) had more than 10 dives.

Visits to Other Reefs

A total of 49.3% (39.0%¹; 45.9%²) 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 18.4% (14.0%¹; 12.3%²), the South Pacific 13.2% (13.3%¹; 10.9%²) and Hawaii 11.6% (10.5%¹; 10.3%²)

Activities Undertaken

The most common activities undertaken during the trip were:

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Snorkelling	79.2%	81.2%	74.3%	72.9%
Swimming	54.4%	54.4%	47.8%	46.4%
Diving	26.9%	28.9%	37.0%	39.5%
Glass-bottom boat	37.8%	45.8%	46.1%	41.9%
View marine mammals	45.2%	29.7%	44.7%	36.8%

⁵ Quarter 3, Year 2

⁶ Overall sample.

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 53.9% (56.6%¹; 53.7%²) of the all responses. The mean satisfaction score was 8.55 (8.6¹; 8.51²). 88.7% (87.1%¹; 85.8%²) of respondents felt that they got value for money, and 97.3% (92.7%¹; 94.3%²) said that they would recommend the trip to others.

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

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Staff / service / professionalism	48.3%	54.5%	48.3%	51.6%
Natural/marine environment	36.0%	27.2%	22.5%	25.1%
Weather / sea state (sea sick)	18.1%	25.6%	31.5%	24.4%
Diving / snorkelling	18.8%	16.0%	13.9%	14.9%

Tourists' **best experiences** included:

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Diving / snorkelling	47.6%	47.3%	47.7%	49.8%
Marine life	40.2%	40.1%	23.2%	34.6%
Staff / service / professionalism	16.1%	12.9%	13.6%	12.7%

Tourists' **worst experiences** included:

	Qtr 3, Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Overall
Weather / sea state (sea sick)	19.5%	41.8%	25.5%	33.3%
None	25.5%	35.1%	36.9%	31.3%

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

	Reef		Trip	
Not at all	1.2%	0.6% 0.7%	1.6%	0.59% 1.0%
Not very much	2.5%	2.6% 3.6%	1.8%	3.5% 3.0%
Somewhat	32.6%	31.4% 32.4%	33.3%	28.5% 31.6%
Very much	63.7%	65.4% 63.3%	63.3%	67.8% 64.5%

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