



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 11 Quarter 3, Year 3 | The Whitsundays 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 = 152). Results from the same quarter from the second year of the project (Qrt 2.3) (N = 106), along with the overall results for the Great Barrier Reef region since November 2006 (N = 1,578) 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 152 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, 47.3% (38.2%;¹ 42.2%;²) than women, 52.7% (61.8%;¹ 57.8%;²). Just over half of the respondents, 55% (62.4%;¹ 55.3%;²), were from Australia, of which 26.8% were from Queensland (Figure 1).

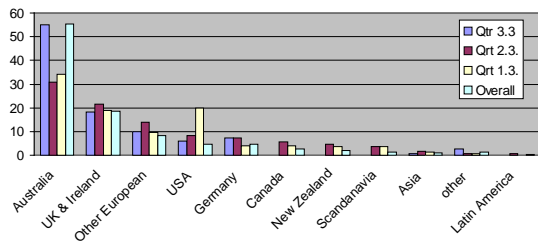


Figure 1: Origin of respondents.

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	Over all
Professionals	31.1%	29.2%	26.8%	26.8%
Students	11.3%	17.9%	21.0%	15.5%
Public service	10.6%	7.5%	5.1%	5.3%
Self-employed	8.6%	9.4%	4.5%	9.4%
Management	8.6%	3.8%	5.1%	8.3%
Domestic duties	4.0%	10.4%	3.8%	4.2%

Age of Respondents

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

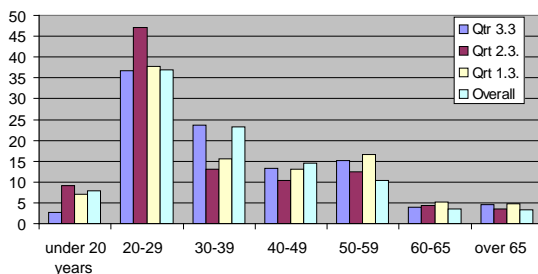


Figure 2: Age of respondents.

¹ Quarter 3, Year 2.

² Overall sample.

Travel Party

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

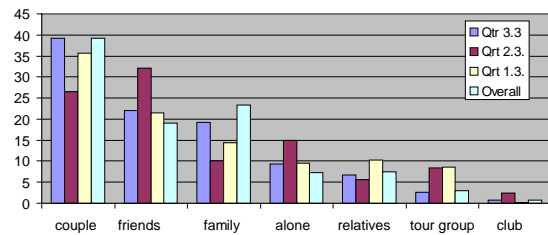


Figure 3: Respondents' travel party (%).

Previous Visits

For 69.5% (74.5%;¹ 75.3%;²) of respondents, this was their first visit to the region. The average length of stay was 4-7 (4-7;¹ 3-7;²) nights.

Accommodation and Transport

Accommodation choices have changed slightly since the previous year with fewer respondents staying in backpacker accommodation (Figure 4). Air transport remains popular as in previous years (Figure 5).

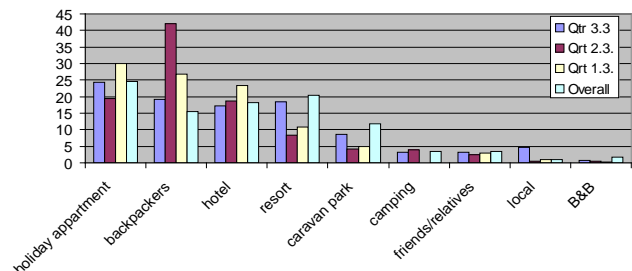


Figure 4: Respondents' choice of accommodation (%).

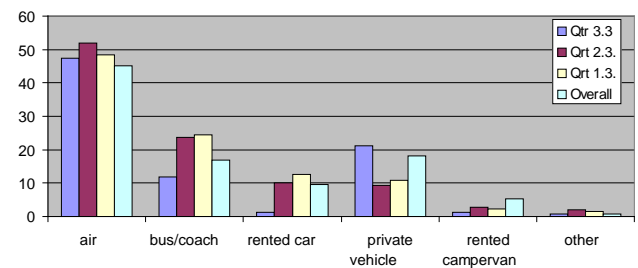


Figure 5: Respondents' choice of transport (%).

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.

OVERALL RESPONDENTS (N=152)	
Gold Coast	6.6%
NSW	3.9%
Tasmania	3.9%
Thailand	3.9%
INTERNATIONAL RESPONDENTS (N=70)	
Thailand	7.4%
USA	7.4%
Spain	5.9%
Germany	4.4%
DOMESTIC RESPONDENTS (N=82)	
Gold Coast	12.2%
NSW	7.3%
Fiji	6.1%
Tasmania	6.1%

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

OVERALL RESPONDENTS (N=152)	
Queensland	24.6%
Australia, excluding Queensland	19.9%
Europe	17.0%
NZ, Pacific and South-east Asia	14.2%
North America (inc. Caribbean)	13.3%
Asia	6.0%
Africa and Latin America	5.0%
INTERNATIONAL RESPONDENTS (N=70)	
Europe	48.4%
North America (inc. Caribbean)	17.2%
NZ, Pacific and South-east Asia	7.8%
Asia	7.1%
Australia	6.3%
Queensland	6.3%
Africa and Latin America	5.7%
DOMESTIC RESPONDENTS (N=82)	
Australia, excluding Queensland	40.5%
Queensland	30.4%
NZ, Pacific and South-east Asia	15.2%
Europe	6.3%
Africa and Latin America	5.1%
Asia	1.3%
North America (inc. Caribbean)	1.3%

Alternative Destinations Considered

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

Destination	
Fiji	7.8%
Sydney	6.1%
Cairns	6.5%
New Zealand	4.4%
Thailand	3.4%

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, rest and relaxation, and enjoying the climate (Figure 6).

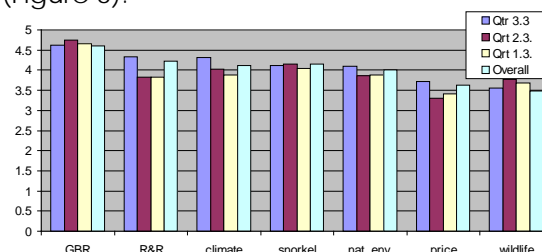


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

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

	Qtr 3 Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Over all
Friends & Relatives, or other	39.1%	41.5%	47.1%	43.9%
Internet	37.5%	23.6%	22.3%	26.5%
Guidebook	24.3%	21.7%	31.2%	24.6%
Travel Agent	17.1%	11.3%	8.9%	13.8%
Previous trip	15.1%	17.0%	10.8%	13.8%

Previous Visits to the Reef

For 59.9% (67.0%³; 67.7%⁴²) respondents this was their first visit to the reef. 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	Over all
Recommended by agent	47.6%	25.5%	9.8%	29.4%
Trip Destination	29.7%	30.2%	4.2%	24.6%
Availability	24.1%	19.8%	23.1%	20.9%
Price	22.4%	19.8%	11.2%	18.8%
Recommended by friend / relative, or other	20.4%	17.9%	13.3%	17.2%

³ Quarter 3, Year 2.

⁴ Overall sample.

Diving Profile

When asked if they planned to dive the reef, 31.3% (23.6%⁵; 28.2%⁶) of respondents said yes. 39.5% (46.7%¹; 38.6%²) of these respondents had no previous diving experience, 31.6% (40.0%¹; 22.2%²) had one to four dives, 7.9% (8.5%¹; 6.3%²) had five to 10 dives and only 21.0% (13.4%¹; 32.9%²) had more than 10 dives.

Visits to Other Reefs

A total of 47.5% (39.8%¹; 41.5%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 South East Asia 13.8% (10.7%¹; 12.0%²), the South Pacific 13.2% (8.9%¹; 10.1%²), and the Caribbean 13.8% (5.4%¹; 8.9%²).

Activities Undertaken

The most common activities undertaken during the trip were:

	Qtr 3 Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Over All
Snorkelling	83.2%	94.6%	78.1%	82.9%
Swimming	65.8%	82.1%	46.5%	60.9%
Glass-bottom boat	59.15	64.3%	30.6%	61.3%
View marine mammals	49.0%	41.1%	67.7%	51.7%
Diving	20.1%	17.9%	20.7%	25.5%

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 54.4% (70.9%¹; 50.9%²) of the all responses. The mean satisfaction score was 8.60 (8.79¹; 8.42²). 84.9% (89.1%¹; 81.4%²) of respondents felt that they got value for money, and 98.0% (97.2%¹; 94.0%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	Over all
Staff / service / professionalism	43.7%	49.4%	45.7%	43.1%
Natural/marine environment	34.1%	20.2%	27.1%	26.0%
Weather / sea state (sea sick)	17.5%	22.5%	29.5%	23.1%
Diving / snorkelling	15.9%	11.2%	10.9%	14.9%

Tourists' **best experiences** included:

	Qtr 3 Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Over All
Diving / snorkelling	46.5%	51.4%	45.9%	47.0%
Marine life	29.9%	27.0%	23.9%	27.2%
Staff / service / professionalism	11.8%	12.4%	11.0%	11.1%

Tourists' **worst experiences** included:

	Qtr 3 Yr 3	Qtr 3, Yr 2	Qtr 3, Yr 1	Over all
None	31.3%	30.2%	39.0%	24.3%
Weather / sea state (sea sick)	14.3%	38.4%	23.2%	26.1%

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

	Reef		Trip	
Not at all	2.1%	0.0%; 1.4%	0.0%;	2.1%; 1.9
Not very much	3.4%	3.9%; 4.9%	2.8%	1.9%; 3.6%
Somewhat	32.2%	29.8%; 36.2%	29.0%	29.8%; 32.4%
Very much	62.3%	68.3%; 57.6%	68.2%	68.3%; 62.0%

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For future updates, visit:

http://www.rrrc.org.au/publications/tourism_barometers.html

⁵ Quarter 3, Year 2.

⁶ Overall sample