



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 11 Quarter 4, Year 3 | Great Barrier Reef October to December 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 (October to December 2009) (Qrt 3.4) (N = 855). Results from the same quarter from the second year of the project (Qrt 2.4) (N = 597), along with the overall results for the Great Barrier Reef region since November 2006 (N = 7,903) 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 2.4) and Year 1 (Qrt 1.4), 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 (October to December 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, 45.8% (42.4%;¹ 44.6%;²) than women, 54.2% (57.6%;¹ 55.4%;²). Slightly less than a third of the respondents, 29.8% (38.6%;¹ 38.9%;²), were from Australia, of which 31.3% were from Queensland (Figure 1).

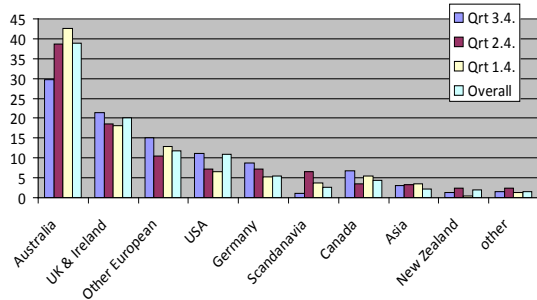


Figure 1: Origin of respondents.

Employment

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Professionals	28.3%	28.8%	28.0%	27.3%
Students	18.5%	17.6%	15.6%	18.0%
Management	8.7%	8.1%	8.1%	8.1%
Self-employed	7.9%	8.0%	11.5%	9.1%
Retired	6.3%	9.0%	6.9%	7.6%

Age of Respondents

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

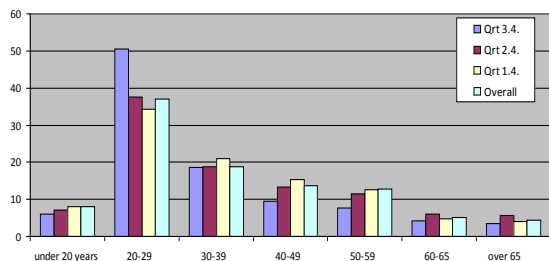


Figure 2: Age of respondents.

¹ Year 2, Quarter 4

² Overall sample.

Travel Party

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

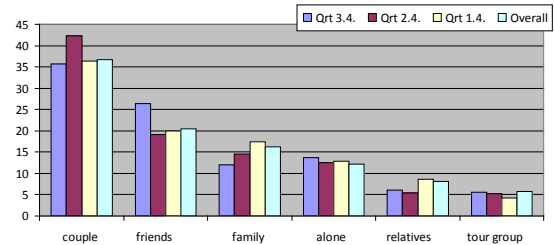


Figure 3: Respondents' travel party (%).

Previous Visits

For 84.4% (76.6%;¹ 77.8%;²) of respondents, this was their first visit to the region. The average length of stay was 2-7 (3-7;¹ 3-5)² nights.

Accommodation and Transport

Backpacker accommodation replaced hotels as the most preferred type of accommodation in this quarter, representing an increase from this same quarter in previous years (Figure 4). Air transport remains popular, although less so than in previous quarters (Figure 5).

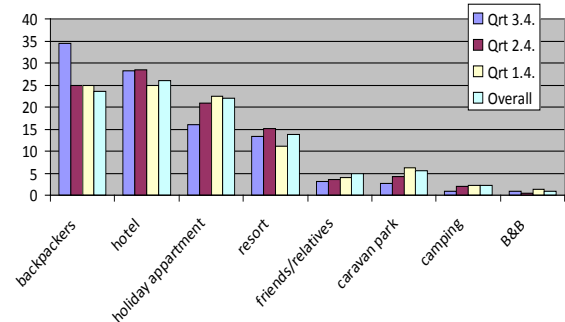


Figure 4: Respondents' choice of accommodation (%).

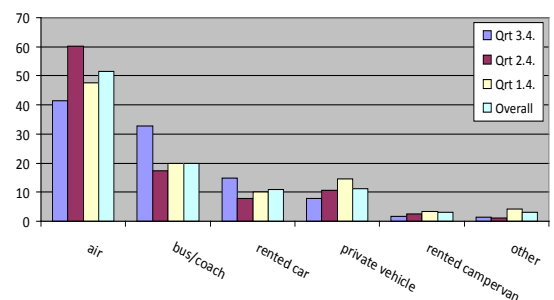


Figure 5: Respondents' choice of transport (%).

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=841)	
USA	9.7%
New Zealand	4.1%
Gold Coast	4.1%
Fiji	3.2%
UK	3.2%
INTERNATIONAL RESPONDENTS (N=589)	
USA	12.6%
UK	4.6%
New Zealand	4.0%
Spain	4.0%
Thailand	3.3%
DOMESTIC RESPONDENTS (N=252)	
Gold Coast	10.9%
New Zealand	4.7%
Fiji	4.7%
Melbourne	4.7%

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

OVERALL RESPONDENTS (N=841)	
North America (inc. Caribbean)	19.8%
Europe	18.9%
NZ, Pacific and South-east Asia	15.7%
Australia, excluding Queensland	13.8%
Queensland	12.9%
Africa and Latin America	11.0%
Asia	7.9%
INTERNATIONAL RESPONDENTS (N=589)	
Europe	26.3%
North America (inc. Caribbean)	25.7%
NZ, Pacific and South-east Asia	15.1%
Africa and Latin America	13.8%
Australia	6.6%
Asia	6.5%
Queensland	6.0%
DOMESTIC RESPONDENTS (N=252)	
Australia, excluding Queensland	34.4%
Queensland	31.1%
NZ, Pacific and South-east Asia	16.4%
North America (inc. Caribbean)	8.2%
Asia	6.6%
Europe	1.7%
Africa and Latin America	1.6%

Alternative Destinations Considered

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

Destination	
New Zealand	7.4%
Sydney	6.0%
Fiji	5.6%
Thailand	4.5%
Gold Coast	3.8%

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, snorkelling and enjoying the natural environment (Figure 6).

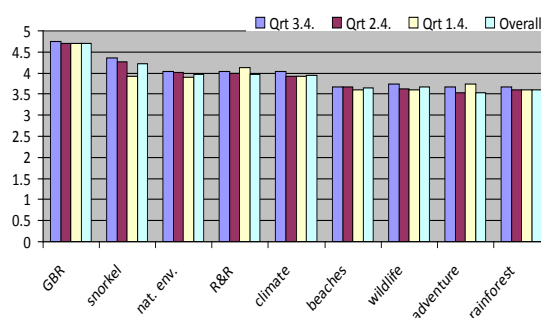


Figure 6: Respondents' motivations to visit the region (mean).

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 information is continuing to increase in popularity across the years.

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Friends & Relatives, or other	50.2%	44.9%	42.1%	43.6%
Guidebook	30.0%	27.7%	29.1%	29.1%
Internet	27.1%	30.8%	24.5%	26.6%
Travel Agent	23.9%	18.1%	18.7%	16.4%
Previous trip	8.7%	13.1%	13.4%	11.6%

Previous Visits to the Reef

For 75.3% (72.8%¹; 72.1%²) respondents this was their first visit to the reef.

¹ Year 2, Quarter 4

² Overall sample.

Choice of Tour Operator

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Recommended by agent	43.6%	39.9%	23.2%	33.2%
Trip Destination	28.3%	30.9%	6.7%	21.1%
Price	26.3%	25.9%	13.0%	20.8%
Recommended by friend / relative, or other	19.8%	17.7%	17.0%	19.1%
Availability	19.7%	22.5%	13.2%	17.2%

Diving Profile

When asked if they planned to dive the reef, 42.1% (39.6%⁵; 38.9%⁶) of respondents said yes. Twenty six percent (35.2%¹; 33.7%²) of these respondents had no previous diving experience, 34.2% (22.8%¹; 25.3%²) had one to four dives, 15.0% (19.9%¹; 11.4%²) had five to 10 dives and only 24.8% (22.1%¹; 29.6%²) had more than 10 dives.

Visits to Other Reefs

A total of 47.7% (45.0%¹; 46.1%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 17.0% (15.4%¹; 12.9%²), Southeast Asia 15.4% (15.0%¹; 14.6%²) and Hawaii 11.5% (10.5%¹; 10.3%²)

Activities Undertaken

The most common activities undertaken during the trip were:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Snorkelling	79.2%	82.1%	50.8%	75.8%
Swimming	56.4%	57.7%	28.7%	50.4%
View marine mammals	49.9%	26.13%	39.7%	39.2%
Diving	46.0%	32.0%	48.9%	40.5%
Glass-bottom boat tour	25.0%	36.7%	30.4%	38.1%

⁵ Year 2, Quarter 4

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 37.3% (58.1%¹; 53.5%²) of the all responses. The mean satisfaction score was 8.47 (8.62¹; 8.50²). Eight seven percent (87.4%¹; 86.0%²) of respondents felt that they got value for money, and 97.4% (94.6%¹; 94.7%²) said that they would recommend the trip to others.

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

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Staff / service / professionalism	41.2%	52.9%	56.2%	46.9%
Natural/marine environment	34.8%	30.8%	15.6%	26.7%
Dive / snorkel	22.3%	18.7%	15.2%	16.8%
Weather / sea state (sea sick)	15.2%	15.6%	25.1%	20.6%

Tourists' **best experiences** included:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
Marine life	58.9%	35.7%	19.4%	31.8%
Diving / snorkelling	9.7%	50.3%	53.2%	45.4%
Staff / service / professionalism	9.7%	15.1%	15.0%	11.7%

Tourists' **worst experiences** included:

	Qtr 4, Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Overall
None	31.3%	37.7%	41.5%	25.3%
Weather / sea state (sea sick)	11.8%	16.6%	23.6%	24.3%

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

	Reef		Trip	
Not at all	1.0%	0.2%; 0.8%	1.0%	0.5%; 1.0%
Not very much	4.5%	2.6%; 3.7%	2.9%	3.3%; 3.0%
Somewhat	35.2%	28.5%; 32.7%	33.7%	31.8%; 31.8%
Very much	59.3%	67.8%; 62.9%	62.3%	64.4%; 64.2%

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