



Australian Government

Department of the Environment, Water, Heritage and the Arts

REEF TOURISM QUARTERLY REPORT # 11 Quarter 4, Year 3 | The Whitsundays 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 = 354). Results from the same quarter from the second year of the project (Qrt 2.4) (N = 132), along with the overall results for the Great Barrier Reef region since November 2006 (N = 1,870) 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, 40.7% (38.5%;¹ 41.7%;²) than women, 59.3% (61.5%;¹ 58.3%;²). Just over a third of the respondents, 37.6% (59.8%;¹ 52.2%;²), were from Australia, of which 17.5% were from Queensland (Figure 1).

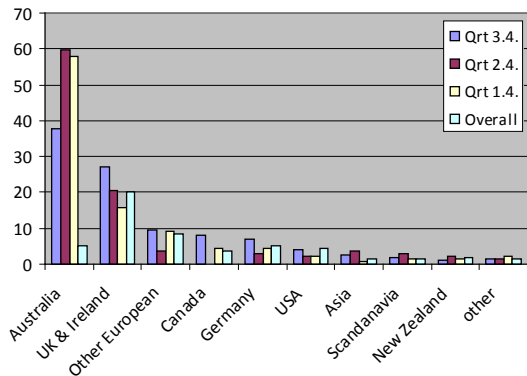


Figure 1: Origin of respondents.

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	Over all
Professionals	27.0%	28.2%	25.8%	26.9%
Students	20.2%	16.0%	12.9%	16.3%
Self-employed	9.4%	6.1%	10.6%	9.4%
Office workers	7.1%	6.9%	7.6%	7.0%
Management	6.0%	6.9%	12.9%	7.8%
Retired	4.0%	6.1%	9.8%	5.4%

Age of Respondents

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

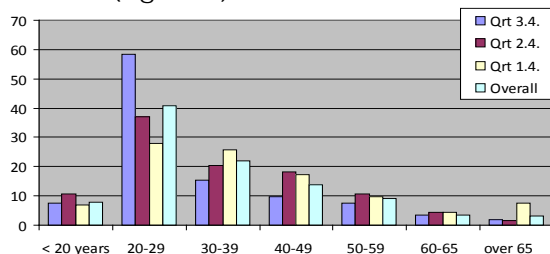


Figure 2: Age of respondents.

¹ Quarter 4, Year 2.

² Overall sample.

Travel Party

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

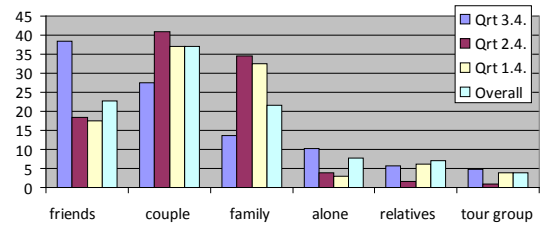


Figure 3: Respondents' travel party (%).

Previous Visits

For 85.0% (70.2%;¹ 77.2%;²) of respondents, this was their first visit to the region. The average length of stay was 2-7 (3-7;¹ 2-7)² nights.

Accommodation and Transport

Accommodation choices have changed slightly since the previous year with more respondents staying in backpacker accommodation (Figure 4). Similarly, bus/coaches have replaced air transport the most used form of transport (Figure 5).

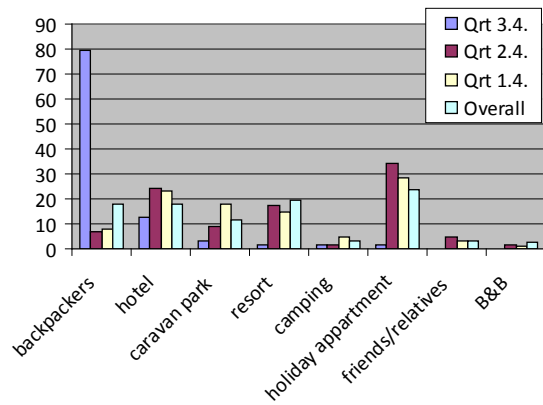


Figure 4: Respondents' choice of accommodation (%).

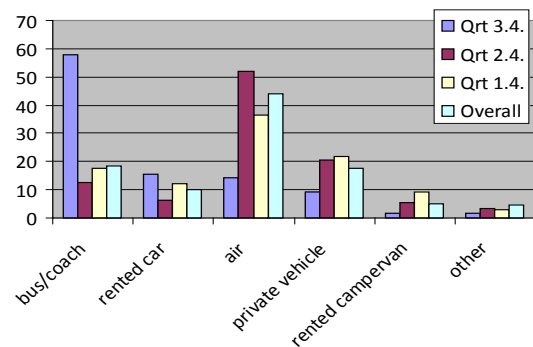


Figure 5: Respondents' choice of transport (%).

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.

OVERALL RESPONDENTS (N=346)	
USA	11.1%
Spain	11.1%
Frazer island	8.8%
India	6.6%
INTERNATIONAL RESPONDENTS (N=213)	
Southeast Asia	12.8%
Spain	12.8%
USA	7.6%
Frazer Island	7.6%
DOMESTIC RESPONDENTS (N=133)	
Gold Coast	12.5%
NSW	5.3%
Fiji	5.3%
Melbourne	5.3%
New Zealand	5.3%

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

OVERALL RESPONDENTS (N=346)	
Europe	28.9%
North America (inc. Caribbean)	15.6%
Queensland	13.3%
NZ, Pacific and South-east Asia	13.3%
Asia	10.0%
Africa and Latin America	10.0%
Australia, excluding Queensland	8.9%
INTERNATIONAL RESPONDENTS (N=213)	
Europe	33.3%
North America (inc. Caribbean)	15.4%
NZ, Pacific and South-east Asia	15.4%
Queensland	12.8%
Asia	7.7%
Australia	7.7%
Africa and Latin America	7.7%
DOMESTIC RESPONDENTS (N=133)	
Australia, excluding Queensland	35.7%
Queensland	32.1%
NZ, Pacific and South-east Asia	17.9%
North America (inc. Caribbean)	7.1%
Asia	5.4%
Europe	1.8%

Alternative Destinations Considered

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

Destination	
New Zealand	7.7%
Sydney	7.7%
Cairns	7.0%
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 include visiting the reef, visiting the beaches and snorkeling (Figure 6).

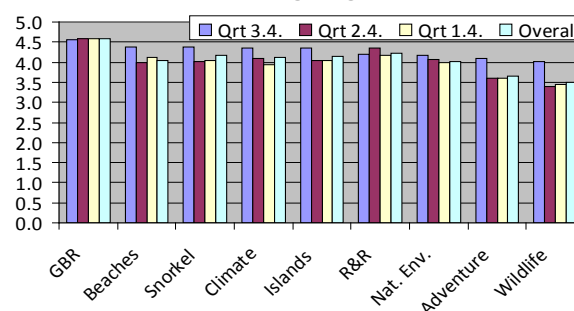


Figure 6: Respondents' motivations to visit the region (mean).

Information Sources

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

	Qtr 4 Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over all
Friends/Relatives or other	57.1%	47.0%	42.1%	53.8%
Internet	24.3%	28.0%	18.0%	26.3%
Guidebook	25.7%	19.7%	30.8%	24.8%
Travel Agent	25.4%	18.2%	10.5%	16.1%
Previous trip	9.0%	17.4%	18.0%	12.7%

Previous Visits to the Reef

For 70.2% (69.0%³; 68.2%⁴) 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 4 Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over all
Recommended by agent	42.4%	38.0%	19.8%	31.9%
Trip Destination	33.1%	38.5%	8.3%	26.5%
Recommended by	26.2%	10.8%	11.4%	18.9%

³ Quarter 4, Year 2

⁴ Overall sample.

friend/relative, or other				
Price	16.3%	17.7%	7.5%	18.2%
Availability	16.3%	26.9%	19.5%	20.1%

Diving Profile

When asked if they planned to dive the reef, 54.0% (28.5%⁵; 29.1%⁶) of respondents said yes. A third (36.0%¹; 38.3%²) of these respondents had no previous diving experience, 52.4% (16.0%¹; 33.6%²) had one to four dives, 9.6% (16.0%¹; 10.0%²) had five to 10 dives and only 4.8% (32.0%¹; 18.1%²) had more than 10 dives.

Visits to Other Reefs

A total of 44.0% (41.0%¹; 41.9%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 Southeast Asia 15.0% (11.3%¹; 12.4%²), the Caribbean 14.4% (12.9%¹; 10.0%²) and the South Pacific 8.8% (8.9%¹; 10.0%²).

Activities Undertaken

The most common activities undertaken during the trip were:

	Qtr 4 Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over All
Snorkelling	88.4%	61.7%	48.2%	83.9%
Swimming	67.7%	33.1%	26.8%	61.5%
View marine mammals	47.4%	56.7%	33.9%	50.9%
Glass-bottom boat	34.0%	59.6%	21.2%	56.5%
Diving	30.6%	47.3%	49.1%	26.4%

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 47.6% (50.0%¹; 50.7%²) of the all responses. The mean satisfaction score was 8.34 (8.15¹; 8.41²). Eighty five percent (77.0%¹; 82.0%²) of respondents felt that they got value for money, and 96.7% (88.8%¹; 94.6%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	Over all
Natural/marine environment	35.8%	14.7%	15.9%	27.5%
Staff / service / professionalism	35.4%	49.0%	56.0%	41.9%
Diving / snorkelling	17.9%	16.7%	15.6%	15.5%
Weather / sea state (sea sick)	12.7%	25.5%	26.4%	21.6%

Tourists' **best experiences** included:

	Qtr 4 Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over All
Diving / snorkelling	48.4%	57.7%	51.5%	47.3%
Marine life	35.9%	18.5%	25.7%	28.6%
Staff / service / professionalism	6.0%	14.6%	15.2%	10.3%

Tourists' **worst experiences** included:

	Qtr 4 Yr 3	Qtr 4, Yr 2	Qtr 4, Yr 1	Over All
None	34.5%	38.3%	40.2%	25.8%
Weather / sea state (sea sick)	8.8%	20.9%	26.1%	23.7%

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

	Reef		Trip	
Not at all	1.2%	08%;1.3%	1.2%;	08%;18%
Not very much	6.7%	63%;52%	3.7%	55%;36%
Somewhat	42.5%	378%;37.1%	41.8%	323%;342%
Very much	49.5%	55.1%;56.3%	53.4%	61.4%;60.5%

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For future updates, visit:

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

⁵ Quarter 4, Year 2

⁶ Overall sample.