



REEF TOURISM QUARTERLY REPORT # 6 Quarter 2, Year 2 | Great Barrier Reef April – June 2008

This quarterly report forms part of a series on reef tourism in the Great Barrier Reef (GBR) produced by James Cook University (JCU) and funded by the Australian Government's Marine and Tropical Sciences Research Facility (MTSRF), which is administered in North Queensland by the Reef and Rainforest Research Centre. The aims and methodology of this research are presented in the introduction below. The data presented in this report summarise the results obtained during the second quarter of the project's second year (N = 580); the results from the same quarter in the first year of data collection (N = 555); and the overall results for the period between November 2006 and June 2008 (N = 3950). The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For purposes of comparison, the figures for the entire sample & the same quarter from Year 1 are provided in the text in brackets after the figures for this quarter (Quarter 2, Year 2).



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/Cairns, Townsville, the Whitsundays, and the Capricorn Coast). Results are available in an aggregate form as well as regionally, such as the report presented here. Currently, ten operators are involved in this research. A total of 580 surveys were collected in the second quarter of Year 2.

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 from the Asian market have yet to be collected. Sampling bias by crews must also be considered.



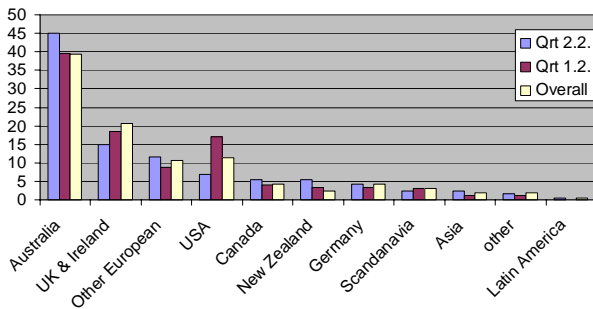
4. FINDINGS



Origin of Respondents

This quarter's sample consisted of slightly fewer men, 43.4% (46.8%;¹ 42.6%;²) than women, 56.6% (53.2%; 57.4%). Approximately one third of the respondents, 34.8% (39.6%; 39.3%), were from Australia, of which 28.0% were from Queensland (Figure 1).

Figure 1: Origin of respondents.



Employment

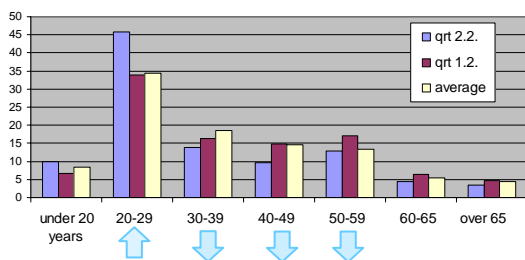
In terms of **employment**, the most common responses were (as a percentage of the total):

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Students	↑ 25.5%	19.2%	17.0%
Professionals	23.1%	23.0%	26.3%
Management	↑ 8.6%	7.2%	8.3%
Self-employed	↑ 7.6%	5.8%	8.4%
Retired	↓ 7.2%	9.4%	8.4%

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.



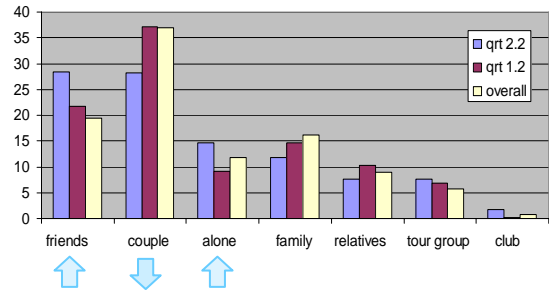
¹ Quarter 2, Year 1.

² Overall sample.

Travel Party

The majority of respondents were travelling with friends or as couples (Figure 3).

Figure 3: Respondents' travel party (%).



Previous Visits

For 75.3% (76.2%; 75.4 %) of respondents, this was their first visit to the region. The average length of stay was 2-5 (2-5; 2-7) nights.

Accommodation and Transport

Backpacker hostels and air travel were the most popular accommodation (Figure 4) and transport (Figure 5) choices.

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

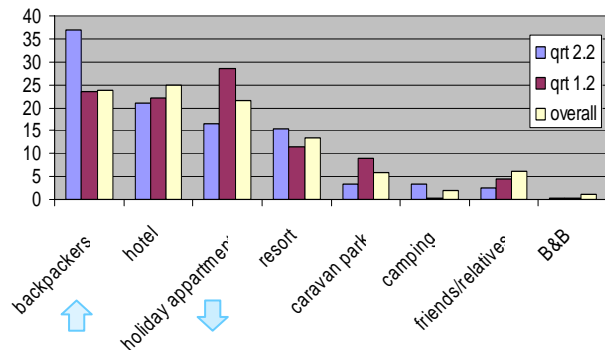
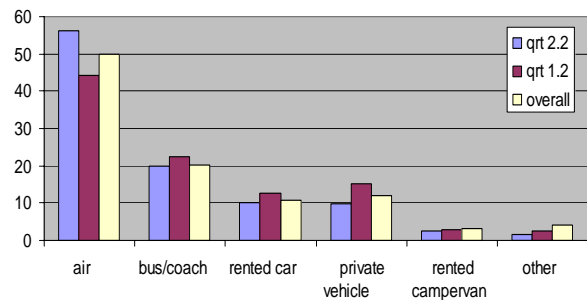


Figure 5: Respondents' choice of transport (%).



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=580)	
New Zealand	5.3%
Gold Coast	4.3%
Spain	3.6%
Europe	3.0%
Thailand	2.8%
INTERNATIONAL RESPONDENTS (N=300)	
New Zealand	7.3%
Spain	6.9%
France	3.6%
USA	3.6%
DOMESTIC RESPONDENTS (N=280)	
Gold Coast	7.8%
Europe	4.4%
UK	4.4%

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

OVERALL RESPONDENTS (N=580)	
Europe	25.9%
Australia, excluding Queensland	20.0%
NZ, Pacific and South-east Asia	18.5%
North America (inc. Caribbean)	14.2%
Queensland	13.4%
Africa and Latin America	4.0%
Asia	4.0%
INTERNATIONAL RESPONDENTS (N=300)	
Europe	34.0%
NZ, Pacific and South-east Asia	19.8%
North America (inc. Caribbean)	19.4%
Australia	9.2%
Africa and Latin America	7.0%
Queensland	7.7%
Asia	5.1%
DOMESTIC RESPONDENTS (N=280)	
Australia, excluding Queensland	34.4%
Queensland	21.2%
Europe	14.8%
NZ, Pacific and South-east Asia	16.2%
Asia	4.5%
Africa and Latin America	2.5%

Alternative Destinations Considered

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

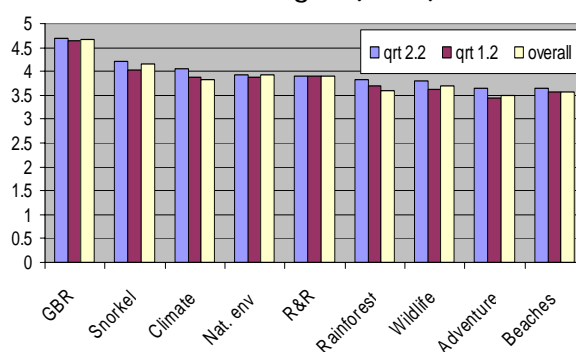
Destination	
New Zealand	6.66%

Sydney	6.14%
Fiji	4.68%
Brisbane	4.10%
Melbourne	3.60%
Thailand	3.20%
Gold Coast	3.20%

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 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.

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Friends and Relatives, or other	41.2%	42.0%	41.7%
Guidebook	↑ 34.3%	29.5%	29.7%
Internet	↑ 30.1%	19.6%	23.6%
Travel Agent	14.5%	13.6%	13.7%
Previous trip	12.1%	13.2%	11.6%

Previous Visits to the Reef

For 69.7% (72.9%; 71.2%) respondents this was their first visit to the reef.

Choice of Tour Operator

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

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Recommended by agent	↑ 36.0%	19.5%	22.4%
Recommended by friend / relative, or other	19.1%	17.6%	19.8%
Price	↑ 15.4%	7.6%	9.4%
Advertising	13.4%	12.5%	15.7%
Availability	12.1%	11.4%	9.7%

Diving Profile

When asked if they planned to dive the reef, 41.3% (34.7%; 39.6%) of respondents said yes. 43.0% (39.6%; 32.5%) of these respondents had no previous diving experience, 25.4% (19.7%; 24.3%) had one to four dives, 11.4% (11.4%; 12.0%) had five to 10 dives and only 20.2% (31.8%; 29.2%) had more than 10 dives.

Visits to Other Reefs

A total of 45.0% (44.6%; 46.2%) 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 13.8% (1.8%; 9.0%), South-east Asia 11.2% (14.8%; 15.2%) and the South Pacific 10.5% (7.7%; 10.5%)

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Snorkelling	75.0%	77.0%	71.6%
Swimming	52.8%	47.8%	45.1%
Diving	43.5%	37.2%	42.5%
Glass-bottom boat	↓ 32.7%	42.1%	41.2%
View marine mammals	↓ 32.4%	47.5%	38.2%

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 51.1% (51.5%; 52.3%) of the all responses. The mean satisfaction score was 8.49 (8.29; 8.34). 79.0% (85.1%; 85.0%) of respondents felt that they got value for money, and 87.2% (85.9%; 89.9%) said that they would recommend the trip to others.

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

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Staff / service / professionalism	↓ 36.3%	51.6%	42.9%
Natural/marine environment	↓ 20.3%	26.9%	22.3%
Weather / sea state (sea sick)	↓ 15.8%	27.8%	23.1%
Diving / snorkelling	↓ 9.2%	15.4%	12.8%

Tourists' **best experiences** included:

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Diving / snorkelling	↓ 28.0%	46.1%	40.9%
Marine life	↓ 28.3%	31.3%	27.7%
Staff / service / professionalism	↓ 6.6%	11.0%	9.7%

Tourists' **worst experiences** included:

	Quarter 2, Year 2	Quarter 2, Year 1	Overall
Weather / sea state (sea sick)	↓ 21.7%	37.9%	33.5%
None	↓ 13.8%	30.3%	26.8%

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

	Reef		Trip	
Not at all	0.3%	1.3%; 1.3%	0.7%	0.9%; 0.9%
Not very much	3.3%	4.3%; 4.3%	3.3%	2.4%; 2.4%
Somewhat	29.9%	32.3%; 32.3%	29.9%	34.8%; 34.8%
Very much	55.6%	62.1%; 62.1%	61.7%	61.8%; 61.8%

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