

## **REEF TOURISM QUARTERLY REPORT 5 Great Barrier Reef Region Quarter 1, Year 2**

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF), 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 first quarter of data collection from the second year (N = 600); the results from the same quarter in the first year of data collection (N = 554); and the overall results for the period between November 2006 and March 2008 (N = 3417). 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 and the same quarter from Year 1 are provided in the text in brackets after the figures for this quarter (Quarter 5).



### **1. INTRODUCTION**



The research described here falls under the MTRSF 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 and Airlie Beach). Results are available in an aggregate form, as presented here, as well as regionally for Cairns/Port Douglas, Townsville and the Whitsundays. Currently, ten operators are involved in this research. A total of 600

surveys were collected in the first 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 collection from the Asian markets is yet to be established. Sampling bias by crews must also be considered.



### **4. FINDINGS**



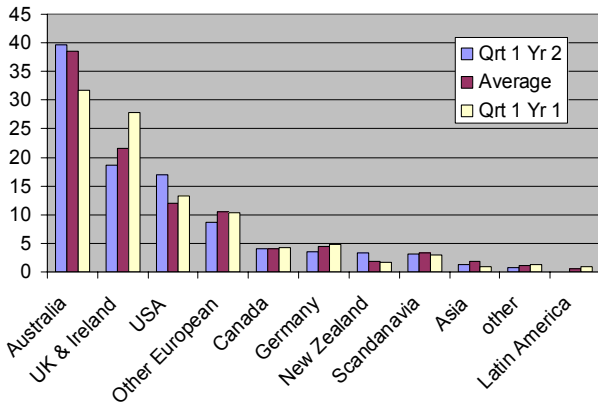
#### ***Origin of Respondents***

This quarter's sample did not vary much from the usual pattern of almost equal number of men, 46.8% (49.0%;<sup>1</sup> 46.0%;<sup>2</sup>) and women, 53.2% (51.0%; 54.0%). Most respondents, 39.6% (31.7%; 38.5%), were from Australia, of which 14.1% were from Queensland (Figure 1).

<sup>1</sup> Quarter 1, Year 1.

<sup>2</sup> Overall sample.

**Figure 1: Origin of respondents.**



**Employment**

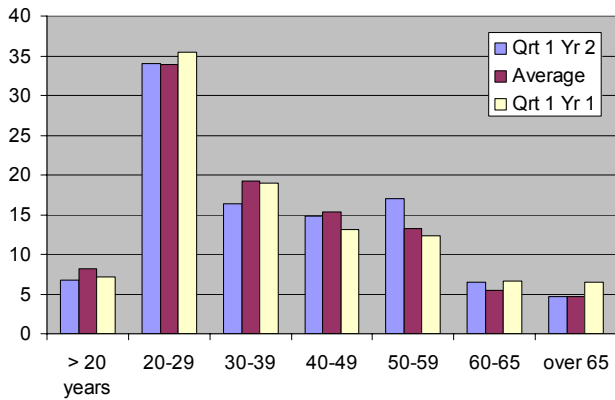
In terms of **employment**, the most common responses were (as a percentage of the total):

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Professionals	23.0%	22.0%	26.6%
Students	19.2%	16.8%	16.6%
Retired	9.4%	12.0%	8.7%
Management	7.2%	8.5%	8.3%

**Age of Respondents**

Respondents in the GBR region fell predominantly into the 20-29 year age bracket.

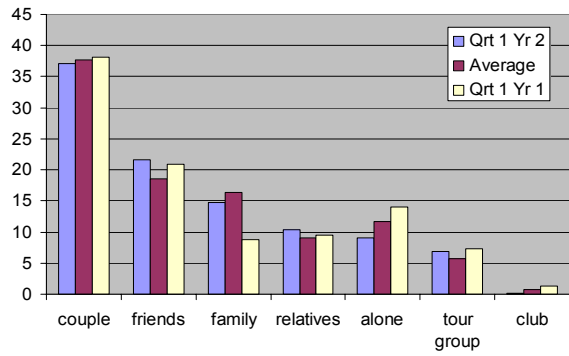
**Figure 2: Age of respondents.**



**Travel Party**

The majority of respondents were **travelling** with their partner (Figure 3):

**Figure3: Respondents' travel party (%).**

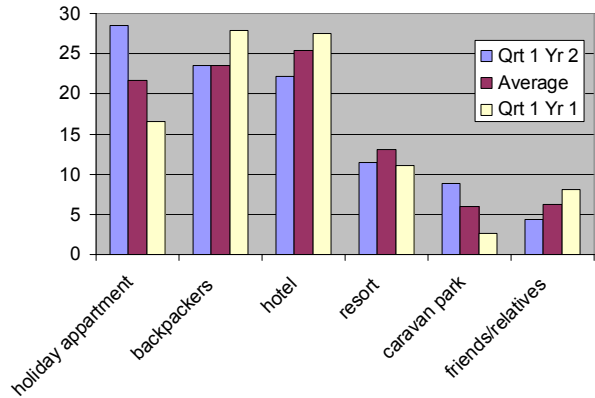


**Previous Visits and Length of Stay**

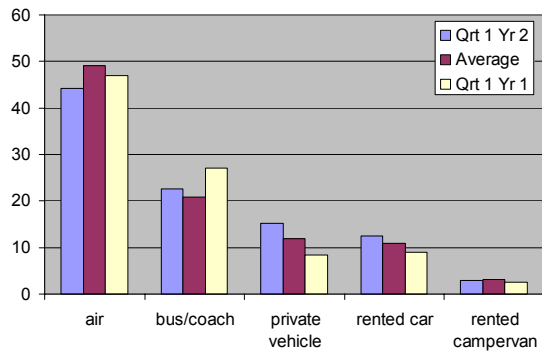
For 76.2% (76.7%; 75.3%) of respondents, this was their first visit to the region. The average length of stay was 3-5 (3-5; 3-5) nights.

**Accommodation and Transport**

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



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



### Previous Holiday Location

The **most popular single destinations** given in response to “Where did you spend your last holiday?” are provided in the following table.

OVERALL RESPONDENTS (N=524)	
New Zealand	5.0%
Spain	4.1%
Thailand	3.7%
USA	3.6%
France	3.2%
INTERNATIONAL RESPONDENTS (N=267)	
France	6.4%
Spain	5.35
Thailand	4.5%
USA	4.1%
Italy	3.8%
DOMESTIC RESPONDENTS (N=257)	
Gold Coast	6.3%
Fiji	4.7%
Tasmania	3.9%
New Zealand	3.9%

A **thematic / regional analysis** shows the following trends:

OVERALL RESPONDENTS (N=550)	
Europe	25.1%
Australia, except Queensland	19.1%
Queensland	11.5%
NZ, Pacific & South-east Asia	15.5%
North America including Caribbean	12.5%
Asia	3.8%
Africa and Latin America	7.3%
INTERNATIONAL RESPONDENTS (N=334)	
Europe	34.9%
North America including Caribbean	19.3%
NZ, Pacific & South-east Asia	16.9%
Africa and Latin America	9.3%
Queensland	4.5%
Asia	3.9%
Australia, except Queensland	5.7%
DOMESTIC RESPONDENTS (N=216)	
Australia, except Queensland	39.8%
Queensland	22.2%
NZ, Pacific & South-east Asia	13.0%
Europe	10.2%
North America including Caribbean	2.3%
Asia	3.7%
Africa and Latin America	4.2%

### Alternative Destinations Considered

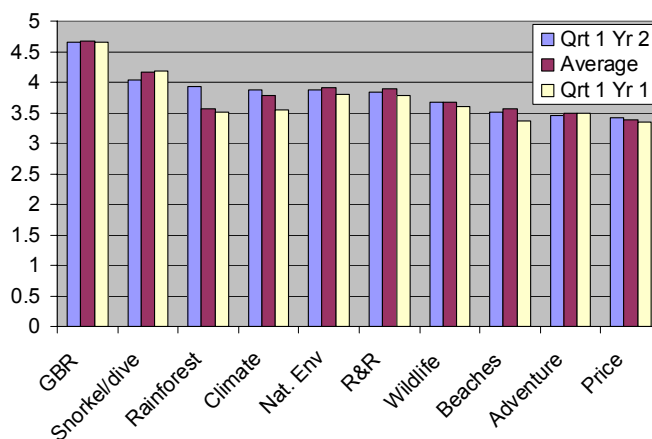
The most popular **alternative destinations** considered when planning this trip were:

Destination	
New Zealand	8.5%
Sydney	4.8%
Fiji	4.4%
Cairns	3.3%
Airlie Beach	3.0%
Melbourne	2.9%
Perth	2.6%
Brisbane	2.5%
Gold Coast	2.4%
Thailand	2.3%

### 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 GBR, snorkelling and seeing the rainforest (Figure 6).

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



### Information Sources

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Guidebook	29.5%	32.2%	29.8%
Internet	19.6%	22.6%	22.8%
Friends and Relatives, or other	42.0%	39.4%	41.5%
Visited before	13.2%	10.1%	11.6%
Travel agent	13.2%	11.3%	13.6%

### Previous Visits

For 72.9% (70.6%; 71.2%) respondents this was their first visit to the reef. Of those who had been to the reef before, 71.1% (78.0%; 78.9%) had been between one and four times before.

### Choice of Tourism Operator

The most common reasons for **choosing their particular reef tour operator** were:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Recommended by agent	17.5%	18.1%	20.4%
Recommended by friend / relative, or other	15.9%	17.6%	21.3%
Price	11.3%	13.1%	13.5%
Package	6.8%	7.2%	7.9%
Advertising	10.3%	7.7%	8.1%
Availability	7.8%	9.8%	9.5%
Type and range of activities	7.2%	5.8%	6.8%
Size of operation	3.8%	5.3%	5.1%

### Diving Profile

When asked if they planned to dive the reef, 34.7% (39.8%; 39.7%) of respondents said yes. 36.9% (24.8%; 31.8%) of respondents had no previous diving experience, 12.1% (13.0%; 12.6%) had completed between one and four dives, 7.1% (15.0%; 11.4%) had completed five to ten dives and only 31.8% (28.8%; 31.4%) had completed more than ten dives.

### Visits to Other Reefs

Over 44.6% (45.6%; 40.6%) of the respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was South-east Asia 14.8% (18.8%; 15 .8%), Micronesia 9.0% (7.1%; 7.4%), the South Pacific 7.7% (8.8%; 10.1%), and the Indian Ocean 7.7% (10.3%; 10.5%).

### Activities Undertaken

The most common **activities** undertaken during the trip were:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Snorkelling	77.0%	72.5%	70.7%
Swimming	47.8%	44.0%	44.1%
View marine animals	47.5%	36.4%	39.4%
Diving	37.2%	38.7%	42.8%
Glass-bottom boat	42.1%	41.3%	40.6%

### 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 51.5% (53.2%; 51.8%) of all responses. The mean satisfaction score was 8.43 (8.44; 8.45).

85.1% (84.6%; 85.6%) of respondents felt they achieved value for money, and 85.9% (91.5%; 90.0%) said they would recommend the trip to others.

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Staff / service / professionalism	51.6%	50.6%	58.0%
Natural environment	26.9%	31.3%	33.2%
Weather / sea state (sea sick)	27.8%	22.5%	30.4%
Diving / snorkelling	15.4%	14.9%	19.8%

Tourists' **best experiences** include:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Diving / snorkelling	46.1%	51.5%	58.2%
Marine life	27.2%	25.4%	29.5%
Staff / service / professionalism	11.0%	12.6%	17.9%

Tourists' **worst experiences** include:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Weather / sea state (sea sick)	37.9%	30.1%	36.1%
None	30.3%	21.7%	33.5%

When asked if the trip met respondents' expectations, the following answers were recorded:

	Reef		Trip	
Not at all	1.3%	1.6 %; 0.9%;	0.9%	4.0%; 1.3%
Not very much	4.1%	3.6%; 3.7%	2.4%	3.9%; 3.2%
Somewhat	31.2%	35.7%; 33.5%	33.3%	31.6%; 31.8%
Very much	60.0%	58.9%; 61.9%	61.8%	60.1%; 63.7%

**For further information about  
this project contact  
James Cook University:**

**Project Leader  
Professor Bruce Prideaux  
[Bruce.Prideaux@jcu.edu.au](mailto:Bruce.Prideaux@jcu.edu.au)  
Phone: (07) 4042 1039**

**Project Manager  
Dr Alexandra Coghlan  
[Alexandra.Coghlan@jcu.edu.au](mailto:Alexandra.Coghlan@jcu.edu.au)  
Phone: (07) 4042 1763**

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