

Reef Tourism

Establishment of a Visitor Monitoring Structure

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Australian Government

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Acronyms Used In This Report

AMPTO	Association of Marine Park Tourism Operators
CERF	Commonwealth Environment Research Facilities
CRC	Cooperative Research Centre
DEW	Commonwealth Department of the Environment and Water Resources
GBR	Great Barrier Reef
GBRMPA	Great Barrier Reef Marine Park Authority
MTSRF	Marine and Tropical Sciences Research Facility
R&R	Rest and relaxation
RRRC	Reef and Rainforest Research Centre Limited
TTNQ	Tourism Tropical North Queensland

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- Tourism Tropical North Queensland
- Townsville Enterprise

Introduction

With a visitation rate of over 1.5 million tourists per year, the importance of tourism on the reef cannot be underestimated. Tourism to the reef includes the following categories: (i) day trips on large catamarans to reef pontoons; (ii) a range of day trips to reef sites on a variety of different types of boats; (iii) day trips to islands; (iv) island resorts; (v) island camping; (vi) one day dive trips; (vii) live-aboard dive trips; (viii) longer cruises; (ix) live-aboard sailing trips (Whitsundays); (x) bareboat charters; (xi) independent, non-commercial yacht trips and tag-alongs; and (xii) charter fishing.

Research Objectives

This research falls under the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF) Program 4.8.6 *Analysis of recreational and tourism use and impact on the Great Barrier Reef for managing sustainable tourism*, Objective (d) *Identification of key trends and drivers of visitor patterns, including an assessment of the economic impacts of visitation and comparison of the Great Barrier Reef with international reef tourist attractions*.

This program identifies annual visitor usage patterns of the Great Barrier Reef (GBR) to enable the identification of key trends and drivers of visitor patterns and economic impacts of visitation.

In this context, we apply the following definitions:

TRENDS: In the context of this research trends are defined as changes in the *supply* and *demand* patterns that govern the flow of visitors to the reef. Trends that are of interest include reported increase of reef visits to Whitsundays, use of smaller boats, more European and repeat visitors, and arrivals in Sydney and departing Cairns (i.e. opportunities to visit the reef before Cairns).

DRIVERS: In this research context drivers are defined as *external factors* and *internal motivators*. External factors are those that encourage visitors to select the GBR as a destination ahead of other destinations. External drivers include destination image, competition from other destinations, economic climate and the health of the reef. *Internal motivations* (sometimes called push factors) are at a more personal level and include time and financial constraints, experience, expectations and satisfaction.

The focus of this report is to document the development of the main research tool used in this project, the reef tourism survey. Within this process, several key stages are identified as follows: the preparatory stage, the survey design, the pilot study, the development of a distribution methodology, data entry and analysis, and finally, reporting and dissemination.

Survey Development

The Preparatory Stage

This research was designed to meet the MTSRF's goal of:

- “Understanding the current and potential industry and community uses of biodiversity and natural resources with respect to ecological, social and economic sustainability; and providing information and options to assist North Queensland managers, industries and communities to optimise the use of biodiversity resources and minimise adverse impacts of use where they occur”; and
- The Department of the Environment and Water Resources (DEW) Priority Research Area 4 “Social and economic impacts of our environment”, in particular, “describing and predicting usage patterns” (DEW, 2007).

The first task of this research was to identify existing research and gaps in our knowledge of reef tourism in the Great Barrier Reef area. This stage was carried out in two phases. The first phase was a literature review while in the following phase consultation was undertaken with key stakeholders.

Literature Review

An extensive literature review was undertaken in order to identify existing research. This focused primarily on the research carried by Moscardo and her team under the Cooperative Research Centre for the Great Barrier Reef World Heritage Area (CRC Reef) and the Tourism Program at James Cook University. According to a review by Moscardo et al. (2003) published research on tourism on the GBR is limited to:

- Economic contribution and other direct uses (Driml & Common, 1996);
- Environmental impacts of tourism (Rouphael & Inglis, 1997);
- Reef experiences at certain sites (Ormsby & Shafer, 1999)
- Perceptions of ideal and actual coral reefs (Fenton et al, 1998)
- Evaluation of reef pontoons (Moscardo, 2001).
- Patterns of reef tourism (Moscardo, 1999; Moscardo and Woods, 1998; Moscardo et al., 2003).

Patterns of reef tourism have been most extensively studied by Moscardo's CRC Reef team. They recognised a number of patterns:

1. *Two distinct market segments*: first time visitors who travel to the reef on large day trip operators in the FNQ region and repeat visitors who seek a variety of reef experiences (Table 1).
2. *Changes in market segments*: reef visitors were more likely to be younger, independent travellers. Visitors to the Cairns and Port Douglas region were more likely to have shorter stays, and had been to Australia before. Visitors to the Whitsunday region were more likely to stay in hostels, have longer stays in Australia, arrive in Sydney and depart from Cairns.
3. *Different use of the reef by different market segments*: visitors from North America and Europe, especially backpackers, are more independent, travel more throughout the GBR coastal regions and were more likely to seek variety in their reef experiences. Asian visitors usually traveled on package tours, with pre-organised reef trips.

- 4 *Changes in reef visitation patterns in terms of location and types of boats preferred:* these included low growth for the FNQ region, rapid growth in the Whitsunday region, and an increase in visitors using smaller boats paralleled by a decrease in the use of larger boats.
5. *Changes in travel patterns:* with more tourists arriving in Sydney and departing from Cairns there are additional opportunities to visit other reef locations.

Table 1: Moscardo et al.'s (2003) reef tourist market segments.

First time visitors: <i>Once in a lifetime</i>	Repeat visitors: <i>Reef Enthusiasts</i>
Tend to be on repeat visits to region. More likely to be in a family group. Usually travelling in private vehicle. More likely to be domestic visitors. More interested in R&R and VFR. Less likely to go to VICs. More likely to make plans day to day. Tend to use pontoon trips. More likely to say not enough activities. Their GBR experience was >5 yrs ago. Tend to have lower incomes. Engage in fewer commercial tourist activities.	More likely to be from Europe or North America. Younger. Have more general experience of coral reefs. Seek opportunities to snorkel and dive. Have longer stays in the region. More physically active. Have higher incomes. More likely to go on dive trips. Over time they move from larger to smaller operations. They seek variety in location, type and size of operation.

Other patterns that were noted in their research, and which are worthy of further investigation, particularly given the time lapse since completion of their work, include:

- A relatively low percentage of domestic/interstate visitors (29%).
- A high proportion of couples (43%).
- Repeat visitors tend to be experienced reef tourists, having visited other reefs. Why do they choose the Great Barrier Reef?
- A higher percentage of visitors choose to swim or snorkel the Reef than dive it (67% vs. 18%). What are the perceptions and use of GBR as a diving destination?
- With reef visitation in the Whitsundays increasing and new developments planned for the area, what will be the long-term shifts, if any, of reef visitation across the Great Barrier Reef region as a whole?
- Telephone surveys of residents from GBR coastal region, and Southern capital cities showed that people who had never been to the reef had slightly more negative images than those who had been. Where do these images come from?

Consultative Phase

Following the completion of the literature review and identification of research and knowledge gaps, the next phase involved consulting with key stakeholders to determine the scope, depth and focus of the research to be carried out.

To this end, meetings were organised with representatives from the Department of Environment and Water Resources (through the MTSRF Operations Committee meeting), Great Barrier Reef Marine Park Authority, Association of Marine Park Tourism Operators and various tourism bodies such as Townsville Enterprise and Tourism Tropical North Queensland and independent marine tourism operators. The aim of these meetings was to understand some of the issues facing marine tourism operators in the region.

As a result of the literature review and meetings, the scope of the research was refined. The core areas to be addressed in the research include:

- The socio-demographic characteristics and motivations of visitors;
- Travel patterns in each GBR region;
- Activity patterns on the reef;
- Alternative destinations considered;
- Previous reef tourism experience;
- Comparison of the GBR with other reef tourism destinations (both national and international);
- Expectations of the reef and reef trip; and
- Satisfaction levels with the reef experience, including an analysis of critical incidences on the Reef that shape satisfaction levels.

The research areas correspond to the MSTRF’s goal of “understanding the current and potential industry and community uses of biodiversity and natural resources with respect to ecological, social and economic sustainability; and providing information and options to assist North Queensland managers, industries and communities to optimise the use of biodiversity resources and minimise adverse impacts of use where they occur”. In addition, they enhance out existing knowledge in the following ways:

1. Refining existing segmentation system and identify patterns of visitation based on socio-demographics, motivations and activities;
2. Identifying and analysing alternative destinations considered by respondents;
3. Measuring satisfaction with reef experiences by increasing our understanding of reef expectations, and comparisons with previous experience of the Great Barrier Reef, other Australian Reefs, and international reef tourism destinations; and
4. Internal and external factors driving trends in visitation patterns.

The methodology employed in this research was determined as follows. The principle methodology for this research is a visitor survey distributed through participating operators (see Table 2).

Table 2: The core research areas.

Core Research:	
1. Refine existing segmentation system and identify patterns of use based on socio-demographics, motivations and activities.	REEF TOURIST SURVEYS
2. Identify and analyse alternative destinations considered.	REEF TOURIST SURVEYS
3. Measure satisfaction with reef experiences, including expectations, and critical incidences.	REEF TOURIST SURVEYS
4. Factors driving trends of visitation: Images of competing international and national destinations. Negative images of the reef (safety, commercialisation / commodification, service quality), branding of the reef, non-reef goers.	LITERATURE REVIEW, REEF TOURIST SURVEYS

The Survey Design

The next stage of this research involved designing the survey. The first requirement was that questions posed above be answered. There were several other constraints upon the survey design to be considered. Firstly, the operators requested a short survey of no more than three to four pages. Second, some stakeholders had requested specific questions in order to collect data of particular interest to them. In particular AMPTO and TTNQ had some useful suggestions in this area. Third, given the scope and duration of the survey and the amount of data collected, data needed to be easy to collate and analyse. It was decided that questions would be mainly close-ended, Likert-scale or multiple choice questions.

Finally, it became apparent that a comparative study of reef and rainforest visitors could be usefully undertaken in the future by comparing results of this project with results of companion MTSRF Project 4.9.2. Accordingly, the survey has three distinct sections: socio-demographic and motivational questions (Parts A and B) that would be comparable between reef and rainforest data. Part C would be specific to the reef and would remain consistent throughout the course of the research, and Part D which would provide a rapid response to emerging issues, region-specific questions, and topics of interest to stakeholders.

A copy of the survey and research questions is provided in Appendix 1.

The Pilot Study

The questionnaire was piloted in the Cairns region with the assistance of five reef tourism operators. A total of 50 surveys were distributed and 48 were returned. The responses in the pilot questionnaires were analysed for validity and reliability. In cases where the respondents had clearly misunderstood the question or had not responded, the questions were reviewed and altered. As a result of this process, only one question, question 19 comparing the Great Barrier Reef to other destinations, was slightly altered.

Next, the pilot survey was sent to an independent researcher at The University of Queensland in order to get academic feedback on the survey. His comments were taken into consideration in the design of the final survey. Finally, feedback from the GBRMPA was received and incorporated into the survey.

In addition, several fieldtrips were undertaken to witness the distribution of the survey, and identify any potential distribution issues, as well as obtain feedback from both crew and passengers as to the content and presentation of the pilot survey. At the same time, participant observation techniques were used to identify and illustrate some of the key elements of reef tourism that contribute towards quality reef tours.

Finally, as a result of feedback from industry, management and tourism bodies, two questions regarding expectations, one question qualifying satisfaction and one question on eco-certification were included in the survey.

Survey Distribution

Next, a systematic, representative and manageable distribution system needed to be established. Distribution needed to cover five regions Port Douglas and Cairns, Townsville, Airlie Beach and the Southern Region / Capricorn coast.

Based upon the GBRMPA's visitor data, a proportional number of surveys were distributed in each region. To obtain a representative sample, marine tourism operators were listed and

classified according to region, size, and type of operation (Appendix B), and support was sought from as wide a range of operators as feasible. Operator support was sought through a number of trips and meetings in the five regions with operational managers and business director/owners. A total of 10 operators offered their support across the five regions, representing small day operators, large pontoon-based operators, live-aboard dive operators and sailing operators.

The boat crews take on the responsibility for distributing the surveys. For each boat, a different distribution system was developed in order to maximize returns and minimize disruption to the boats' day to day operation. This limited randomisation of the data, but was felt to be a necessary and acceptable compromise in order to ensure survey returns.

In addition, boat crews were asked to make a note of the environmental conditions encountered on the day that the survey was distributed as well as the date of distribution. It was hoped that this would encourage operators to distribute the surveys over a number of days and in varying conditions, and allow the researchers to take into account effects such as rough seas (and seasickness) and/or rainy days in the analysis of the data. Where this proved to be too difficult or time-consuming for the crews, they were simply asked to make a note on each survey of the date of distribution and reef destination for that day. This enables the researchers to cross-reference surveys with Australian Bureau of Meteorology data.

Data Entry and Analysis

The results from the surveys are being entered and coded into SPSS. The complete analysis of the results is yet to be fully developed.

Difficulties

The major difficulty encountered whilst developing the project in 2006 was the time taken for funding arrangements to be finalised. Some procedural difficulties were also encountered as boat crews were inconsistent with the distribution of the survey, and did not always collect the additional information required to complete the survey. These issues will be resolved when crews become accustomed to distributing the survey.

Research Reporting and Dissemination

Research reporting will take place at two levels. First, regular reporting to the Reef and Rainforest Research Centre that addresses the MTSRF milestones will occur. Second, quarterly reporting to key stakeholders will be undertaken in the form of industry workshops and reports. It is planned that a quarterly meeting will be held in each of the five regions in which the data has been collected. The data presented will represent an aggregate across the Great Barrier Reef area, as well for each of the five regions. The reports will be made publicly available to interested parties. In addition, each partner involved in the distribution of the surveys will receive a copy of their business-specific results.

Further dissemination of results will occur through conference presentations the Australian Coral Reef Society annual conference in Perth, 2007.

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Appendix 1



MTSRF Reef Tourism Survey

James Cook University (JCU) and the Reef and Rainforest Research Centre are investigating the patterns and trends of tourist visitation on the Great Barrier Reef. The information collected through this research will be used by management and industry in order to ensure the sustainable development of tourism on the Great Barrier Reef.

The attached survey is voluntary, anonymous and completely confidential. We do not require any of your personal details in this survey. The survey should take approximately five minutes to complete.

**PLEASE DETACH AND RETAIN THIS INFORMATION
PAGE ONLY FOR YOUR FUTURE REFERENCE.**

If you would like to discuss this project in more detail, please contact the Project Manager. Alternatively, if you would like to discuss any ethical matters regarding this project, please contact the Ethics Officer.

Project Manager:

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REEF TOURIST SURVEY

		OFFICE USE ONLY					
Yr	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Op	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q1. Are you:

- Male Female

Q2. Where do you usually live?

Australia (*postcode*) _____ Overseas (*country*) _____

Q3. Please indicate your age group:

- Under 20 yrs 20 to 29 30 to 39 40 to 49 50 to 59
 60 to 65 Over 65 yrs

Q4. How would you best describe your occupation: (*Please choose only one*)

- Self-employed Professional Retail Domestic duties
 Management Office/Clerical Public Service Manual/Factory worker
 Service Industry Tradesperson Student Retired / Semi-retired
 Other: _____

Q5. Which of these best describes your immediate travel party:

- Alone Couple (partner/spouse) Tour group Club
 Friends Family with children Relatives

Q6. Is this your first visit to LOCATION?

- Yes No *if No, how many times have you visited LOCATION?* _____

Q7. How many nights do you intend spending in LOCATION? _____ nights

Q8. What is your main type of accommodation during your visit to LOCATION?

- Hotel/motel Resort Backpackers hostel Holiday apartment/unit
 Caravan park/cabin Camping Bed & breakfast Friends/relatives

Q9. What is your main type of transportation to LOCATION?

- Air Private vehicle Rented car Rented campervan/caravan
 Bus/coach Rail Cruise boat Other: _____

Q10. Where did you find out about LOCATION? (*Select all that apply*)

- Internet Tourist guide books Friends/family Advertisements in print
 Travel Agent TV documentary Visitor centres Advertisements on TV/radio
 Been before Other (*please specify*): _____

Q11. Please tell us where you spent your last holiday: _____

Q12. Please list up to 3 other destinations you considered while planning your current holiday:

- 1) _____ 2) _____ 3) _____

Q13. Please indicate how important each of the features was in your decision to visit LOCATION:

	Not at all Important	Unimportant	Neutral	Important	Very Important
Visit the Great Barrier Reef	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit the rainforest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
See Australian wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experience Aboriginal culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The price matched my budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experience the natural environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rest & relax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snorkelling & diving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spend time with my family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meet new people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit the beaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taste tropical fruits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting friends & relatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experience the outback	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Go shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit the islands	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business/conference/meeting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Try reef seafood	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To go sailing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14. Please explain why you chose this reef operator today _____

Q15. Is this your first visit to the reef?

- Yes No *If **No**, how many times have you visited the reef?* _____

Q16. Are you here to dive the reef?

- No Yes *If **Yes**, how many dives have you completed before this trip?* _____

Q17. Have you ever visited any other coral reefs?

- No → *Go to Question 20* Yes → *Go to Question 18*

Q18. Which of the following reefs have you visited and how many times have you visited them?

- South East Asia _____ Indian Ocean _____ Red Sea _____ Micronesia _____
 South Pacific _____ Caribbean _____ Hawaii _____ Other Aust reefs _____

Q19. How do the other reefs that you have visited compare with the Great Barrier Reef?

	Better	Same	Worse		Better	Same	Worse
South East Asia is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Red Sea is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
South Pacific is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Hawaii is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Indian Ocean is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Micronesia is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Caribbean is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other Aust. reefs are	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q20. Did you notice if your reef operator is eco-certified? Yes No

Q21. Please pick from the following list words that describe your reef trip today:

- fantastic reef tour for all adventure diving expedition luxury live-a-board
 introduction to the reef a relaxing, fun filled day on the reef fun diving

Q22. What activities have you participated in today?

- Swimming Resort/uncertified scuba diving Game fishing
 Snorkelling Glass bottom boat/semi-sub coral viewing Overnight cruise
 Certified scuba diving Visiting the islands Reef fishing
 Diver training course Viewing marine animals: _____ Sailing

Q23. Have you visited the Great Barrier Reef at any other locations on this trip?

- No Yes *If Yes, where did you go?* _____

Q24. On a scale of 1 (not at all satisfactory) to 10 (highly satisfactory) how would you rate your reef trip?

- 1 2 3 4 5 6 7 8 9 10

Q25. What factors influenced your satisfaction rating? _____

Q26. What were the best features of the trip for you? _____

Q27. What were the worst features of the trip for you? _____

Q28. To what extent did the reef that you saw today meet your pre-trip expectations?

- Not at all Not very Somewhat Very much

Q29. To what extent did the experience that you had today meet your pre-trip expectations?

- Not at all Not very Somewhat Very much

Q30. Taking into account all the different elements of your trip today (comfort of the boat, quality and diversity of the reef, activities and interpretation available, professionalism of the crew, etc.), do you feel that you got value for your money?

- Yes Unsure No *If No, please explain:*
-

Q31. Would you recommend visiting the Great Barrier Reef to prospective visitors?

- No Yes Unsure Not to everybody

*If you have selected **Not to everybody**, please explain who you think this type of reef experience is best or not suited to?*
