



National Environmental
Research Program

TROPICAL ECOSYSTEMS *hub*

Interim Report

The Social and Economic Long Term Monitoring Program (SELTMP) 2013

Tourism in the Great Barrier Reef



Matt Curnock, Nadine Marshall, Renae Tobin, Samantha Stone-Jovicich, Erin Bohensky,
Petina Pert, Jeremy Goldberg, Margaret Gooch, Sarah Gillet and Lea Scherl



GREAT BARRIER REEF
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Reef &
Rainforest
RESEARCH CENTRE

The Social and Economic Long Term Monitoring Program (SELTMP) 2013 Tourism in the Great Barrier Reef

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SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

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Introduction

The Great Barrier Reef (GBR) is an iconic international tourism attraction. A thriving, significant tourism industry has been a part of the Marine Park since the early 1930s when tourism resorts became popular. Since then, the industry has changed and expanded considerably, diversifying into a wide range of new products and experiences. It is now estimated that GBR tourism employs more than 64,000 people (full-time equivalent) and contributes \$5.2 billion annually to the Australian economy¹. The diversity of Reef tourism products, services and activities today include charter fishing, bareboat sailing, cruise shipping, helicopter and seaplane rides, water sports, whale watching and kayak tours, as well as a plethora of SCUBA dive and snorkelling options for which the GBR is well renowned.

Tourism activities and experiences in the GBR are set in a range of different environments including mangroves and coastal habitats, beaches and islands, as well as inshore, mid-shelf and outer coral reefs. The expected quality of these environments plays an important role in tourists' travel decision making, and tourists' perceptions of the health and aesthetic qualities of the locations they visit can strongly influence their satisfaction and likelihood of returning or recommending the destination to others. An understanding of how tourists perceive the GBR, how they experience it, and how their perceptions are formed is becoming increasingly important for tourism operators and Reef managers aiming to provide outstanding Reef tourism experiences that are managed sustainably.

This technical report presents a snapshot of socio-economic data and indicators relevant to the current state of tourism visitation and the tourism industry in the Great Barrier Reef region. A wide range of secondary data is compiled, showing patterns of regional tourism visitation, industry use and activities in the GBR. For the first time, new primary data are included from SELTMP surveys conducted over mid 2013, representing 2621 tourists who visited the GBR region (from Cooktown to Bundaberg), as well as 119 GBR tourism operations. These survey data provide new insights into tourists' and tourism operators' relationship, values and perceptions of the Reef, and will become an important baseline for monitoring and understanding industry trends, and the potential impacts of changes in the environment and society.

¹Deloitte Access Economics (2013). Economic Contribution of the Great Barrier Reef. Great Barrier Reef Marine Park Authority, Townsville. Available online: http://www.gbrmpa.gov.au/_data/assets/pdf_file/0006/66417/Economic-contribution-of-the-Great-Barrier-Reef-2013.pdf

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The SELTMP framework for describing the Reef Relationship

A) How people use and depend on the GBR

Use of the Environment: Where, When, How, How Much

Activities (*what, how, how much*)

Spatial and temporal patterns of use (*where and when*)

Social Relationship with the Environment: Who and Why

Cultural, spiritual and intellectual inspiration and experiences (*place, identity, aesthetics, satisfaction*)

Economic Relationship with the Environment (What is the relationship like?):

Employment, value and investment

B) Human and Community Well-being

C) Indirect Drivers of Change

Employability

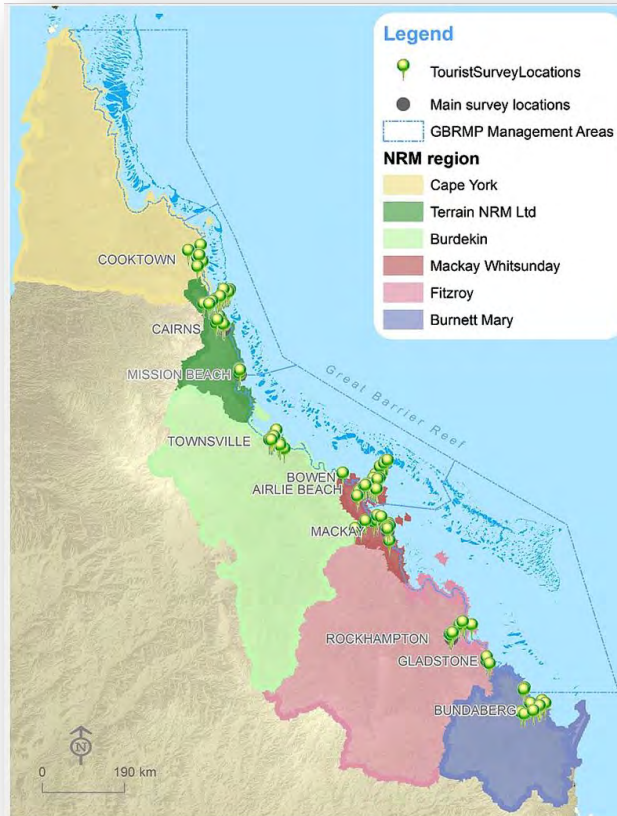
Environmental stewardship

Information and Networks

Sector-specific drivers

D) Direct Drivers of Change

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF



2013 SELTMP Survey – Methods & Response rate

GBR Tourist Survey

Respondents were surveyed via face-to-face interviews, with responses to survey questions entered into an iPad, using the iSurvey application. In some cases respondents opted to complete the survey on paper, and their responses were later entered into the iPad app. For the purposes of this survey, tourists were defined as non-resident visitors to the GBR region (i.e. the GBR catchment, bounded by Bundaberg in the south, Cape York in the north and the Great Dividing Range in the west). Surveys were conducted at locations in and around 14 coastal towns of the GBR region, from Cooktown to Bundaberg. Survey locations included public beaches, airports, boat ramps, jetties, shopping centres, caravan parks, markets and a limited number of Reef tourism vessels. Surveys were conducted in English only, and access to tour groups (e.g. on board coaches, in hotels etc.) was limited. It is therefore likely that some important tourist market segments (e.g. Asian tour group travellers) and non-English speaking visitors are under-represented. GBR resident surveys were conducted at the same time as the tourist surveys, and the response rate for both survey types combined was over 53%. A sample of 2621 tourists completed the survey and are included in the results that follow.

GBR Tourism Operator Survey

Respondents were surveyed via telephone interview, with responses entered directly into the iPad app. A database was compiled to identify all GBR tourism businesses that were currently operating. Tourism operations were identified initially via a comprehensive web search, followed by snowball sampling once surveys had commenced. A total of 213 tourism businesses were identified and requested to participate. Of these, 34 declined, 57 were unresponsive to contact attempts and 122 agreed to participate. A total of 119 respondents completed the survey.

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Definitions for secondary data:

Tourism expenditure covers actual expenditure by the visitor, or on behalf of the visitor, and is defined in the international standards as: '...the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.' ([International Recommendations for Tourism Statistics 2008, para 4.2](#))

Marine Parks Permit: In the Great Barrier Reef Marine Park and the associated GBRCMP, permits for activities which involve both the Commonwealth GBRMP and the State GBRCMP are issued under a joint permit assessment process administered by the Great Barrier Reef Marine Park Authority (GBRMPA) in consultation with QPWS. In this area, zoning is complementary, with matching requirements for both the State and Commonwealth marine parks.

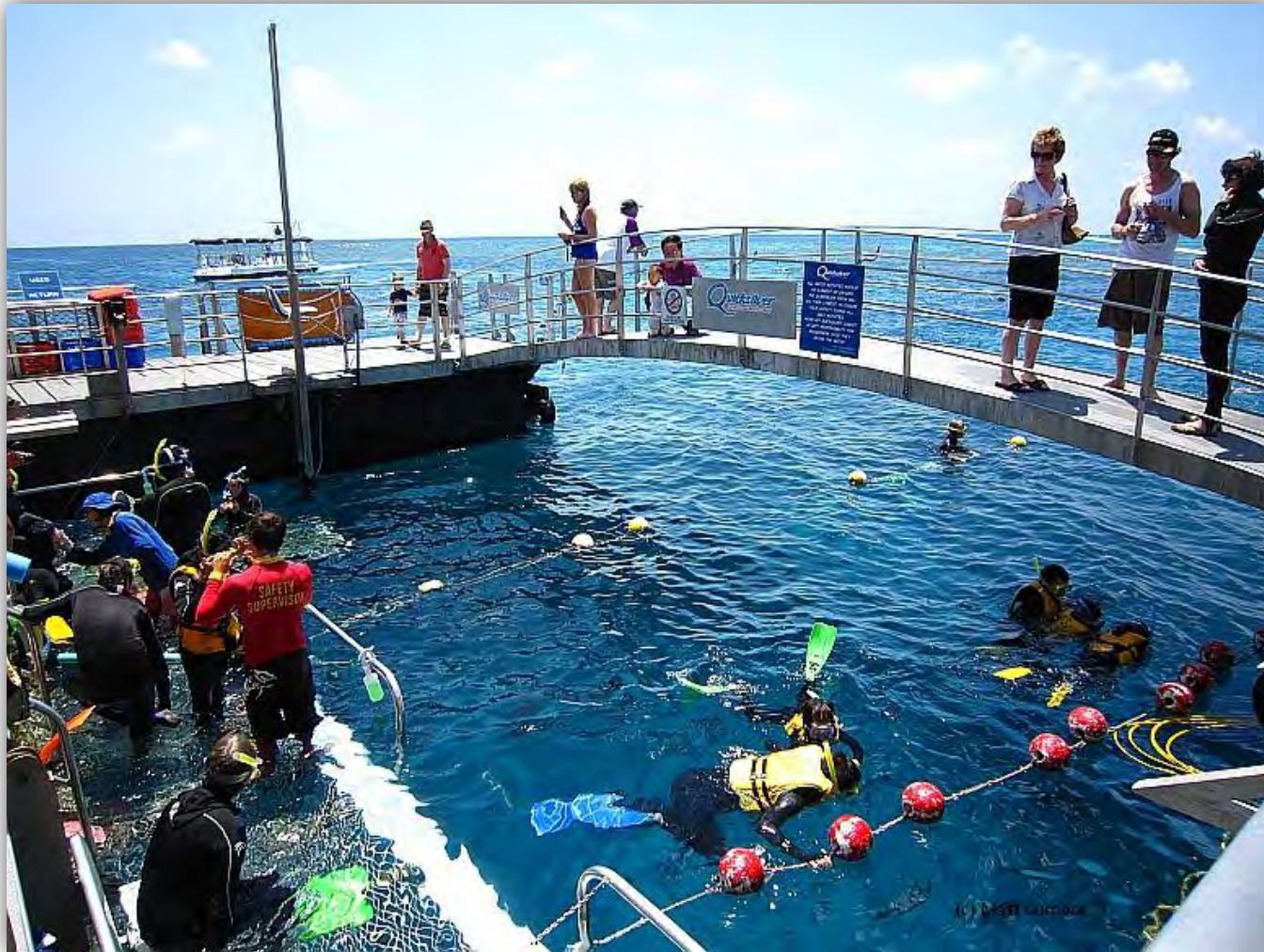
<http://www.derm.qld.gov.au/register/p00908aa.pdf>

Commercial Tour: A commercial tour is a tour conducted for gain. Tour includes any safari, scenic flight, cruise, excursion, visit, outing or journey. Retrieved from:

<http://www.derm.qld.gov.au/register/p01086aa.pdf>

Tourist: The Australian Bureau of Statistics defines a tourist as “any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.” Note that for the primary SELTMP survey data, “tourists” in the GBR region (or GBR catchment; east of the Great Dividing Range, from Bundaberg to Cape York) are defined as all visitors who normally reside outside this region.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF PART A: TOURISTS



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

International visitors to Australia

Totals Visitors

Total Visitors aged >15
5,766,005
63% had been here
before
Total visitor nights: 211
M (+7%)

²Source: Tourism Research Australia (2013)

Reason for visit

Holiday : 44%
Visit friends/relatives : 25%
Business : 16%
Education : 6%
Employment : 4%
Other : 4%

²Source: Tourism Research Australia (2013)

Source Countries

New Zealand - 1,098,391
(19%)
China – 620,197 (10.7%)
UK – 559,882 (9.7%)
USA – 463,498 (8%)

²Source: Tourism Research Australia (2013)

Expenditures

Average trip expenditure:
\$3,331
Average nightly
expenditure: \$91
Total expenditure in Oz:
\$19.2 billion (+5%)

²Source: Tourism Research Australia (2013)

Tours

Inclusive package
travellers: 14%

Group tours: 9%

²Source: Tourism Research Australia (2013)

States Visited

NSW :51%
Queensland :36%
Victoria :32%

²Source: Tourism Research Australia (2013)

Visitor Nights

NSW: :33%
Victoria: :22%
Queensland: :22%

²Source: Tourism Research Australia (2013)

Expenditures by region

Sydney 5.8 billion
Melbourne 4.2 billion
Perth 1.9 billion
Brisbane 1.6 billion
TNQ 877 million

²Source: Tourism Research Australia (2013)

²Tourism Research Australia (2013). International Visitors in Australia. March 2013 Quarterly Results of the International Visitor Survey. Commonwealth Department of Resources, Energy and Tourism, Canberra. Available online: <http://www.tra.gov.au/documents/ivs/International-Visitors-in-Australia-March-2013.pdf>

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

International visitors to Australia

Totals Visitors by State

QLD	2,062,000
NSW	2,976,000
VIC	1,857,000
Other	1,712,000
Total	5,766,000

²Source: Tourism Research Australia (2013)

Total Visitor Nights

QLD	45,467,000
NSW	68,553,000
VIC	46,603,000
Other	49,470,000
Total	210,092,000

²Source: Tourism Research Australia (2013)

Average Length of Stay

QLD	:22
NSW	:23
VIC	:25
Other	:24.8
Total	:24.4

²Source: Tourism Research Australia (2013)

Average length of stay by region (QLD)

TNQ	:8.6
Townsville	:14.9
Whitsundays	:7.1
Mackay	:17
SGBR	:16
QLD Total	:22

²Source: Tourism Research Australia (2013)

Total QLD visitors by type

Holiday	1,194,000
Visit friends and relatives –	401,000
Business	219,000
Other	239,000
Total	2,053,000

²Source: Tourism Research Australia (2013)

Total QLD visitors nights by type

Holiday	20,518,000
Visit friends/relatives –	8,107,000
Business	1,856,000
Other	14,986,000
Total	45,467,000

²Source: Tourism Research Australia (2013)

QLD Visitors by region

TNQ	: 709,000
Townsville	: 112,000
Whitsundays	: 181,000
Mackay	: 44,000
SGBR	: 132,000

²Source: Tourism Research Australia (2013)

QLD Visitor nights by region

TNQ	: 6,132,000
Townsville	: 1,674,000
Whitsundays	: 1,289,000
Mackay	: 753,000
SGBR	: 2,121,000

²Source: Tourism Research Australia (2013)

²Tourism Research Australia (2013). International Visitors in Australia. March 2013 Quarterly Results of the International Visitor Survey. Commonwealth Department of Resources, Energy and Tourism, Canberra. Available online: <http://www.tra.gov.au/documents/ivs/International-Visitors-in-Australia-March-2013.pdf>

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

International visitors to the GBR region

TNQ (visitors, visitor nights, average length of stay)

Holiday – (644,000; 4,734,000; 7.4)
 Visit friends/relatives – (31,000; 533,000; 17.2)
 Business – (21,000; 148,000; 6.9)
 Total – (709,000; 6,132,000; 8.6)

³Source: Tourism and Events Queensland (2013)

⁵Tourism and Events Queensland (2013).

Townsville (visitors, visitor nights, average length of stay)

Holiday – (89,000; 737,000; 8.3)
 Visit friends/relatives – (13,000; 355,000; 26.4)
 Business – (4,000; 46,000; 10.6)
 Total – (112,000; 1,674,000; 14.9)

³Source: Tourism and Events Queensland (2013)

⁷Tourism and Events Queensland (2013).

Whitsundays (visitors, visitor nights, average length of stay)

Holiday – (172,000; 963,000; 5.6)
 Visit friends/relatives – (6,000; 71,000; 11.8)
 Business – (2,000; n/p; n/p)
 Total – (181,000; 1,289,000; 7.1)

³Source: Tourism and Events Queensland (2013)

⁸Tourism and Events Queensland (2013).

Mackay (visitors, visitor nights, average length of stay)

Holiday – (26,000; 259,000; 5.4)
 Visit friends/relatives – (10,000; 198,000; 19.9)
 Business – (3,000; n/p; n/p)
 Total – (44,000; 753,000; 17)

³Source: Tourism and Events Queensland (2013)

⁹Tourism and Events Queensland (2013)

SGBR (visitors, visitor nights, average length of stay)

Holiday – (101,000; 1,138,000; 11.2)
 Visit friends/relatives – (18,000; 319,000; 17.6)
 Business – (7,000; 115,000; 15.6)
 Total – (132,000; 2,121,000; 16)

³Source: Tourism and Events Queensland (2013)

¹⁰Tourism and Events Queensland (2013)

Queensland Total (visitors, visitor nights, average length of stay)

Holiday – (1,385,000; 20,518,000; 14.5)
 Visit friends/relatives – (503,000; 8,107,000; 19.9)
 Business – (203,000; 1,856,000; 8.7)
 Total – (2,065,000; 45,467,000; 22.3)

³Source: Tourism and Events Queensland (2013)

³Tourism and Events Queensland (2013). International Tourism Snapshot, Year ended March 2013. Available online: http://www.tq.com.au/research/summary-visitor-statistics/summary-visitor-statistics_home.cfm

⁶Tourism and Events Queensland (2013). Tropical North Qld Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/tropical-north-queensland/tropical-north-queensland_home.cfm

⁷Tourism and Events Queensland (2013). Townsville Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/townsville/townsville_home.cfm

⁸Tourism and Events Queensland (2013). Whitsundays Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/whitsundays/whitsundays_home.cfm

⁹Tourism and Events Queensland (2013). Mackay Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/mackay/mackay_home.cfm

¹⁰Tourism and Events Queensland (2013). Southern GBR Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/central-queensland-southern-great-barrier-reef-and-bundaberg/southern-great-barrier-reef/southern-great-barrier-reef_home.cfm

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Domestic travelers in Australia

Totals Visitors

Total Visitors: 74.6 million
aged 15 and over (+2%)

Total visitor nights: 285
million (+2%)

2/3 (67%) travelled within
state or territory of residence

⁴Source: Tourism Research Australia
(2013)

Reason for trip

Holiday : 47%
Visit friends/relatives : 31%
Business : 16%

Expenditure

Overnight : \$50.3 bil (+0.7%)
Day : \$18.1 billion (+5.9%)

⁴Source: Tourism Research Australia
(2013)

Accommodation

Friends/relatives : 37%

Hotel/resort/motel: 26%

Transportation

Private vehicle : 72%

Air transport : 23%

⁴Source: Tourism Research Australia
(2013)

Totals Visitors by State

QLD	:18,044,000
NSW	:24,866,000
VIC	:17,834,000
Other	:16,601,000
Total	:74,622,000

⁴Source: Tourism Research Australia
(2013)

Total Visitor Nights by State

QLD	:75,658,000
NSW	: 84,262,000
VIC	: 57,266,000
Other	: 68,036,000
Total	:285,222,000

⁴Source: Tourism Research Australia
(2013)

Expenditure by domestic overnight visitors by region

Sydney	:\$5.3 billion
Melbourne	:\$5.9 billion
Sunshine Coast	:\$2 billion
TNQ	:\$1.6 billion

⁴Source: Tourism Research Australia
(2013)

Average Length of Stay by State

QLD	: 4
NSW	: 3
VIC	: 3
Other	: 4.4
Total	: 3.6

⁴Source: Tourism Research Australia
(2013)

⁴Tourism Research Australia (2013). Travel by Australians. March 2013 Quarterly Results of the National Visitor Survey. Commonwealth Department of Resources, Energy and Tourism, Canberra. Available online: http://www.tra.gov.au/documents/nvs/Travel_by_Australians_-_March_Quarter_2013.pdf

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Domestic travelers visiting Queensland

Total QLD visitors by type

Holiday –	7,921,000
Visit friends/relatives –	6,169,000
Business –	3,218,000
Other –	1,101,000
Total –	18,044,000

⁴Source: Tourism Research Australia (2013)

Total QLD visitor nights by type

Holiday –	37,586,000
Visit friends/relatives –	22,746,000
Business –	10,834,000
Other –	3,154,000
Total –	75,658,000

⁴Source: Tourism Research Australia (2013)

QLD Visitors by region

SGBR –	1,711,000
Mackay –	748,000
Whitsundays –	473,000
Townsville –	888,000
TNQ –	1,645,000

⁵Source: Tourism and Events Queensland (2013)

QLD Visitor nights by region

SGBR –	6,822,000
Mackay –	2,402,000
Whitsundays –	2,141,000
Townsville –	3,841,000
TNQ –	8,039,000
Total –	74,471,000

⁵⁻¹⁰Source: Tourism and Events Queensland (2013)

Average length of stay by region

SGBR	: 4.0
Mackay	: 3.2
Whitsundays	: 4.5
Townsville	: 4.3
TNQ	: 4.9
QLD Total	: 4.0

⁴⁻¹⁰Tourism Research Australia (2013).

⁴Tourism Research Australia (2013). Travel by Australians. March 2013 Quarterly Results of the National Visitor Survey. Commonwealth Department of Resources, Energy and Tourism, Canberra. Available online:

http://www.tra.gov.au/documents/nvs/Travel_by_Australians_-_March_Quarter_2013.pdf

⁵Tourism and Events Queensland (2013). Domestic Tourism Snapshot, Year Ended June 2013, Domestic Visitors to Queensland. Available online: http://www.tq.com.au/research/summary-visitor-statistics/summary-visitor-statistics_home.cfm

⁶Tourism and Events Queensland (2013). Tropical North Qld Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/tropical-north-queensland/tropical-north-queensland_home.cfm

⁷Tourism and Events Queensland (2013). Townsville Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/townsville/townsville_home.cfm

⁸Tourism and Events Queensland (2013). Whitsundays Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/whitsundays/whitsundays_home.cfm

⁹Tourism and Events Queensland (2013). Mackay Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/mackay/mackay_home.cfm

¹⁰Tourism and Events Queensland (2013). Southern GBR Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/central-queensland-southern-great-barrier-reef-and-bundaberg/southern-great-barrier-reef/southern-great-barrier-reef_home.cfm

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Domestic travelers visiting the GBR region

TNQ (visitors, visitor nights, average length of stay)

Holiday – (911,000; 5,017,000, 5.5)
 Visit friends/relatives – (329,000; 1,431,000; 4.4)
 Business – (323,000; 912,000; 2.8)
 Total – (1,645,000; 8,039,000; 4.9)

⁶Source: Tourism and Events Queensland (2013)

Townsville (visitors, visitor nights, average length of stay)

Holiday – (307,000; 1,397,000, 4.5)
 Visit friends/relatives – (290,000; 1,550,000; 5.4)
 Business – (187,000; 523,000; 2.8)
 Total – (888,000; 3,841,000; 4.3)

⁷Source: Tourism and Events Queensland (2013)

Whitsundays (visitors, visitor nights, average length of stay)

Holiday – (327,000; 1,459,000; 4.5)
 Visit friends/relatives – (86,000; n/p; n/p)
 Business – (31,000; n/p; n/p)
 Total – (473,000; 2,141,000; 4.5)

⁸Source: Tourism and Events Queensland (2013)

Mackay (visitors, visitor nights, average length of stay)

Holiday – (167,000; 448,000, 2.7)
 Visit friends/relatives – (224,000; 806,000; 3.6)
 Business – (310,000; 1,051,000; 3.4)
 Total (748,000; 2,402,000; 3.2)

⁸Source: Tourism and Events Queensland (2013)

SGBR (visitors, visitor nights, average length of stay)

Holiday (623,000; 2,932,000, 4.7)
 Visit friends/relatives – (603,000; 164,000; 3.6)
 Business – (386,000; 1,224,000; 3.2)
 Total (1,711,000; 6,822,000; 4.0)

¹⁰Source: Tourism and Events Queensland (2013)

⁶Tourism and Events Queensland (2013). Tropical North Qld Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/tropical-north-queensland/tropical-north-queensland_home.cfm

⁷Tourism and Events Queensland (2013). Townsville Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/townsville/townsville_home.cfm

⁸Tourism and Events Queensland (2013). Whitsundays Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/whitsundays/whitsundays_home.cfm

⁹Tourism and Events Queensland (2013). Mackay Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/whitsundays-islands-of-great-barrier-reef-and-mackay/mackay/mackay_home.cfm

¹⁰Tourism and Events Queensland (2013). Southern GBR Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/central-queensland-southern-great-barrier-reef-and-bundaberg/southern-great-barrier-reef/southern-great-barrier-reef_home.cfm

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Cruise shipping visitation

Total Australian cruise ship visitation (2012-13)

No. of ships –	43
Total pax capacity –	62,051
Total crew capacity –	27,032
Ports visited –	30
Pax days at port –	1,814,456
Total pax expend. –	\$574.1m
Total crew expend. –	\$68.2m

¹¹Source: Cruise Down Under(2013)

State comparison cruise ship visitation (2012-13)

Passenger days at port :

NSW –	989,410
QLD –	453,573
VIC –	120,250
WA –	101,776
TAS –	78,944
NT –	43,007
SA –	24,156

¹¹Source: Cruise Down Under(2013)

QLD ports cruise ship visitation (2012-13)

Visit days:

Brisbane–	105
Mackay/Whit. –	38
Cairns/Yorkeys –	43
Port Douglas –	18
Townsville –	4
Thursday Is. –	5
Cooktown –	2

¹¹Source: Cruise Down Under(2013)

QLD ports cruise ship visitation (2012-13)

Passenger days at port :

Brisbane–	324,582
Mackay/Whit. –	54,691
Cairns/Yorkeys –	44,149
Port Douglas –	25,156
Townsville –	2,813
Thursday Is. –	1,513
Cooktown –	669

¹¹Source: Cruise Down Under(2013)

QLD ports cruise ship visitation (2012-13)

Passenger expenditure:

Brisbane–	\$117.17m
Mackay/Whit. –	\$11.18m
Cairns/Yorkeys –	\$8.90m
Port Douglas –	\$4.70m
Townsville –	\$0.58m
Thursday Is. –	\$0.36m
Cooktown –	\$0.16m

¹¹Source: Cruise Down Under(2013)

QLD ports cruise ship visitation (2012-13)

Total expenditure:

Brisbane–	\$349.7m
Mackay/Whit. –	\$13.1m
Cairns/Yorkeys –	\$11.6m
Port Douglas –	\$4.8m
Townsville –	\$0.9m
Thursday Is. –	\$0.4m
Cooktown –	\$0.17m

¹¹Source: Cruise Down Under(2013)

¹¹Cruise Down Under (2013). Economic Impact Assessment of the Cruise Shipping Industry in Australia 2012-13. Available online: <http://www.cruisedownunder.com/sites/all/files/cdu/Documents/cdu-economic-impact-report.pdf>

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Accommodation in the GBR region

TNQ

Establishments – 172 (-1.1%)
 Room nights available – 3,950,664 (-3.0%)
 Room nights occupied – 2,342,300 (2.1%)
 Room Occupancy – 59.3% (3.0%)
 Takings - \$304 million (2.8%)
 Average room rate - \$129.72 (0.7%)
 Yield - \$76.91 (6.0%)

⁶Source: Tourism and Events Queensland (2013)

Townsville

Establishments – 60 (1.7%)
 Room nights available – 1,088,919 (3.9%)
 Room nights occupied – 696,149 (-0.3%)
 Room Occupancy – 63.9% (-2.7%)
 Takings - \$91 million (2.2%)
 Average room rate - \$131.16 (+2.5%)
 Yield - \$83.85 (-1.6%)

⁷Source: Tourism and Events Queensland (2013)

Whitsundays

Establishments – 34 (-5.6%)
 Room nights available – 1,000,077 (-1.4%)
 Room nights occupied – 533,651 (5.4%)
 Room Occupancy – 53.4% (3.4%)
 Takings - \$123 million (9.3%)
 Average room rate - \$229.76 (+3.7%)
 Yield - \$122.60 (10.8%)

⁸Source: Tourism and Events Queensland (2013)

Mackay

Establishments – 53 (-1.9%)
 Room nights available – 731,988 (-4.9%)
 Room nights occupied – 565,018 (+2.8%)
 Room Occupancy – 77.2% (+5.8%)
 Takings - \$90 million (+3.5%)
 Average room rate - \$158.91 (+0.7%)
 Yield - \$122.66 (+8.8%)

⁹Source: Tourism and Events Queensland (2013)

SGBR (Central QLD)

Establishments – 106 (1.9%)
 Room nights available – 1,473,433 (0.6%)
 Room nights occupied – 1,016,121 (+9.8%)
 Room Occupancy – 69% (+5.8%)
 Takings - \$151 million (+24.7%)
 Average room rate - \$148.96 (+13.6%)
 Yield - \$102.73 (+24%)

¹⁰Source: Tourism and Events Queensland (2013)

SGBR (Bundaberg)

Establishments – 35 (0.0%)
 Room nights available – 316,308 (1.6%)
 Room nights occupied – 188,876 (+8.7%)
 Room Occupancy – 59.7% (+3.9%)
 Takings - \$22 million (+11%)
 Average room rate - \$118.88 (+2.1%)
 Yield - \$70.99 (+9.3%)

¹⁰Source: Tourism and Events Queensland (2013)

Queensland Total

Establishments – 1,125 (0.1%)
 Room nights available – 22,296,851 (-0.1%)
 Room nights occupied – 14,640,100 (3.3%)
 Room Occupancy – 65.7% (2.2%)
 Takings - \$2,253 million (6.6%)
 Average room rate - \$153.90 (3.2%)
 Yield - \$101.05 (6.7%)

⁶⁻¹⁰Source: Tourism and Events Queensland (2013)

Australia Total

Establishments – 4,222 (-0.2%)
 Room nights available – 83,198,942 (0.5%)
 Room nights occupied – 54,502,600 (1.9%)
 Room Occupancy – 65.5% (0.9%)
 Takings - \$8,890 million (5.4%)
 Average room rate - \$163.12 (3.5%)
 Yield - \$106.20 (4.9%)

⁶⁻¹⁰Source: Tourism and Events Queensland (2013)

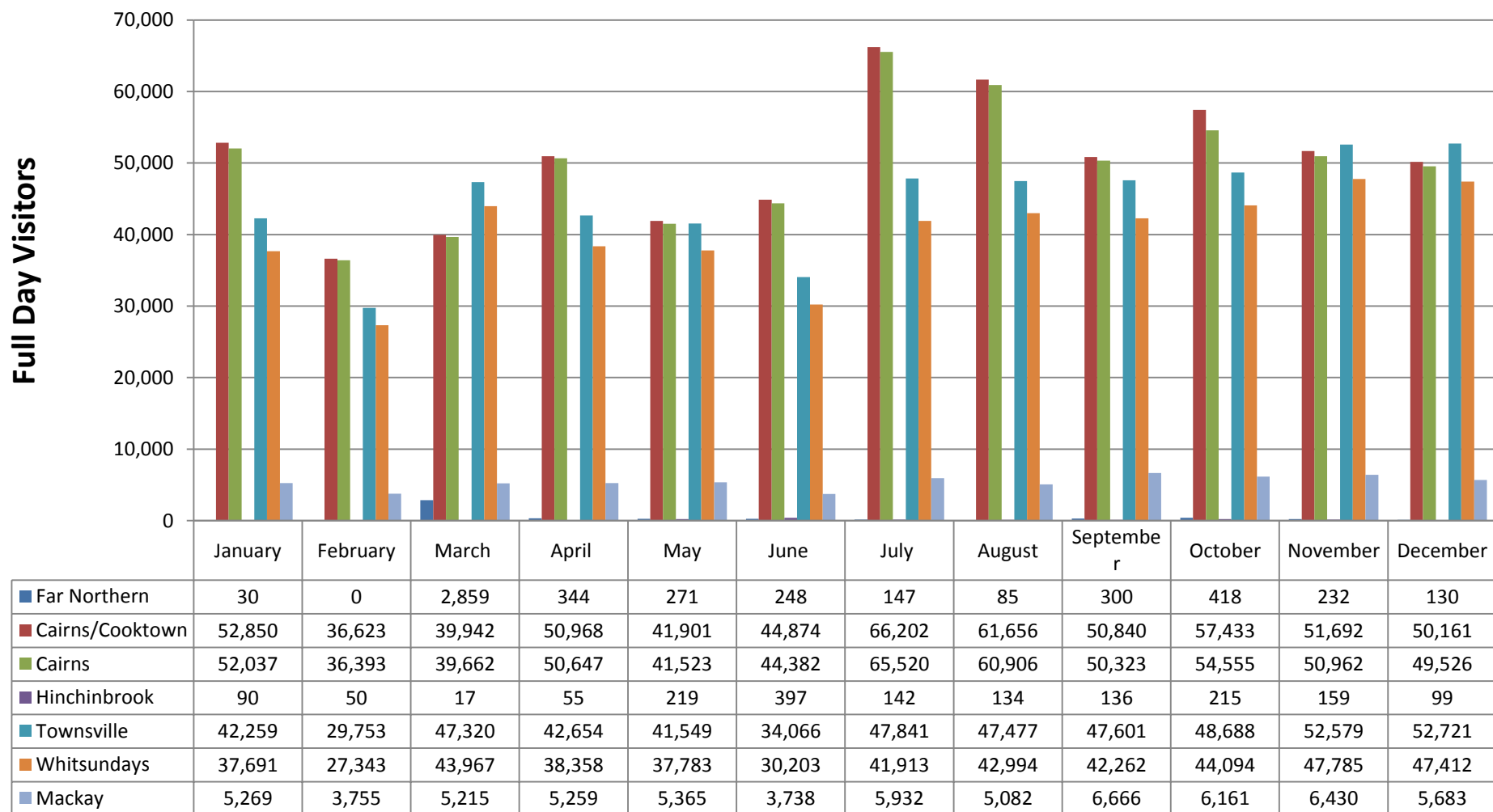
⁶⁻¹⁰Tourism and Events Queensland (2013). Summary Visitor Statistics (Regional Snapshot,) Year Ended March 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/tropics-and-great-barrier-reef/tropical-north-queensland/tropical-north-queensland_home.cfm

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Seasonality of tourist GBR visitation

Full day visits to GBRMP Management Areas

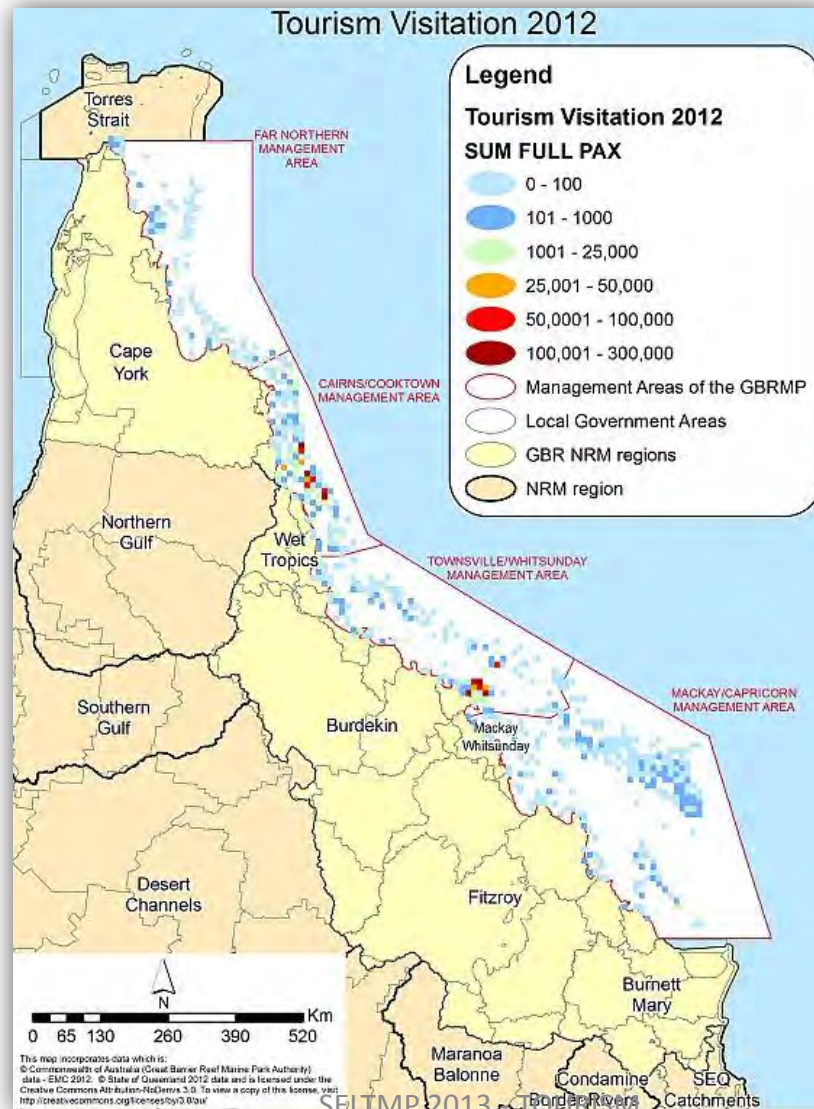


¹¹GBRMPA (2011). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Spatial distribution of tourist visits (2012 data)



¹¹GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

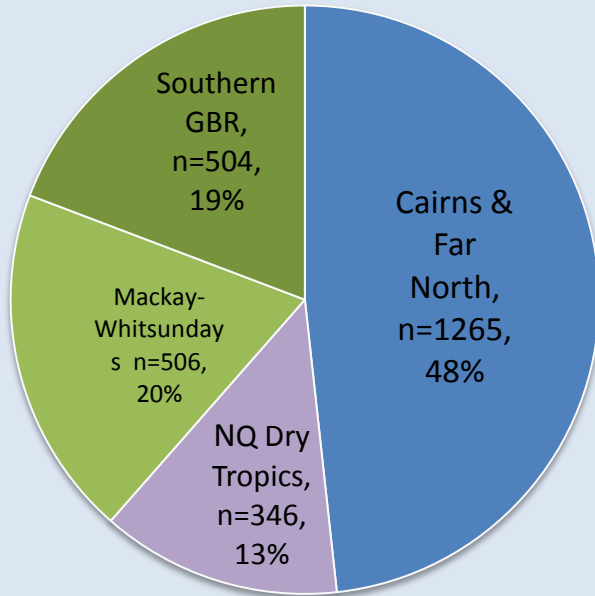
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

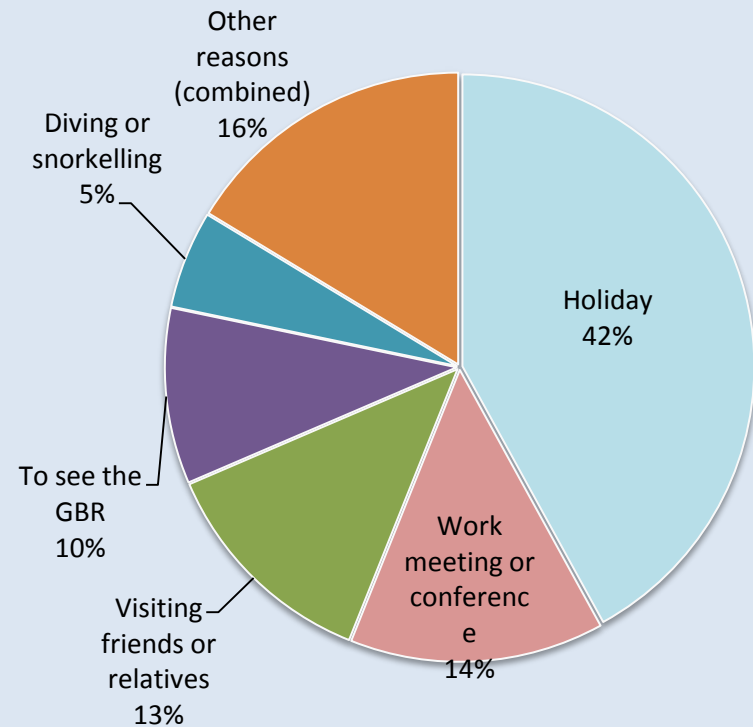
2013 GBR Tourist Survey Results

Sample description

GBR tourist sample size: broad sampling areas (n=2621)



Main reason for visiting the GBR region:



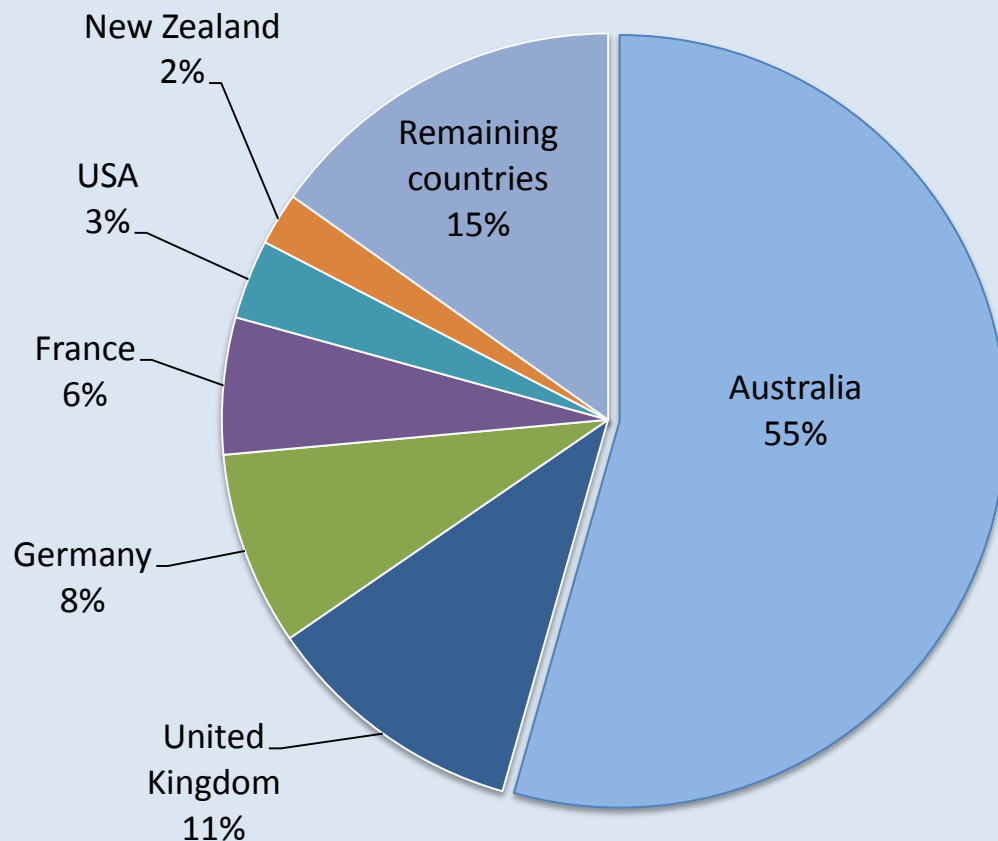
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

2013 GBR Tourist Survey Results

Sample description*

Country of origin:



Sample summary (n=2621):

- Mean age = 40
- 49% female
- 54% Australian; remainder came from 53 countries
- Median 10 days duration of stay in region
- 70% had visited the GBR** during their visit
- 50% went on a paid tour to the GBR
- 87% said that they would return to the GBR

**Some important tourist market segments (e.g. Asian tour group travellers) and non-English speaking visitors are likely to be under-represented*

***GBR definition includes reefs, islands, intertidal areas & beaches*

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

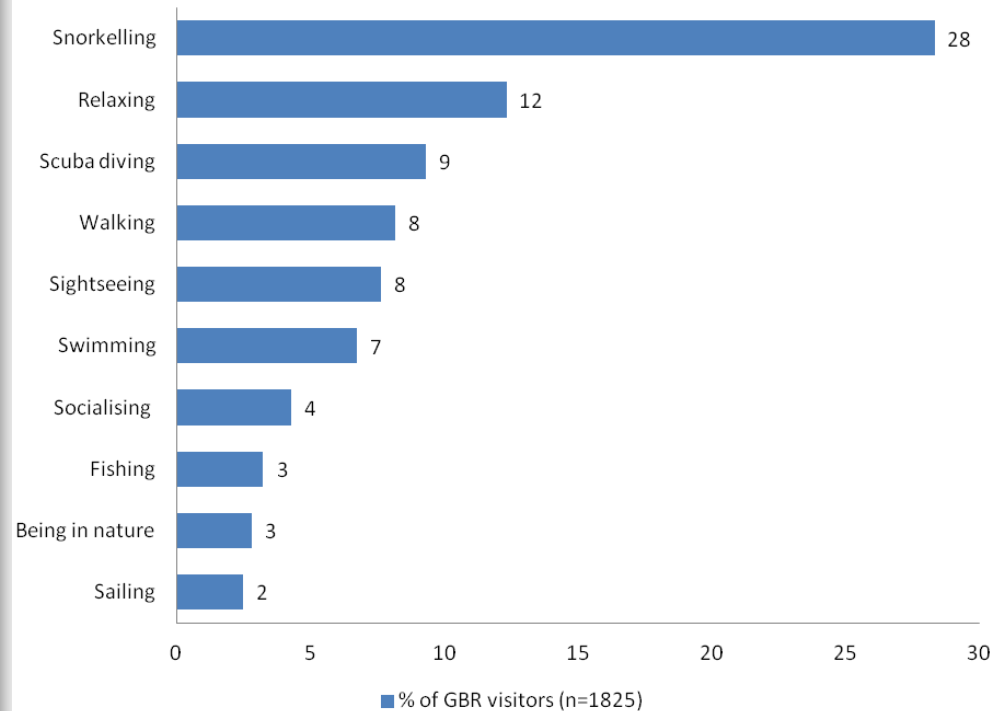
2013 GBR Tourist Survey Results

Patterns of use

Location most recently visited in the GBR:



Main activity during GBR visit (% of respondents):

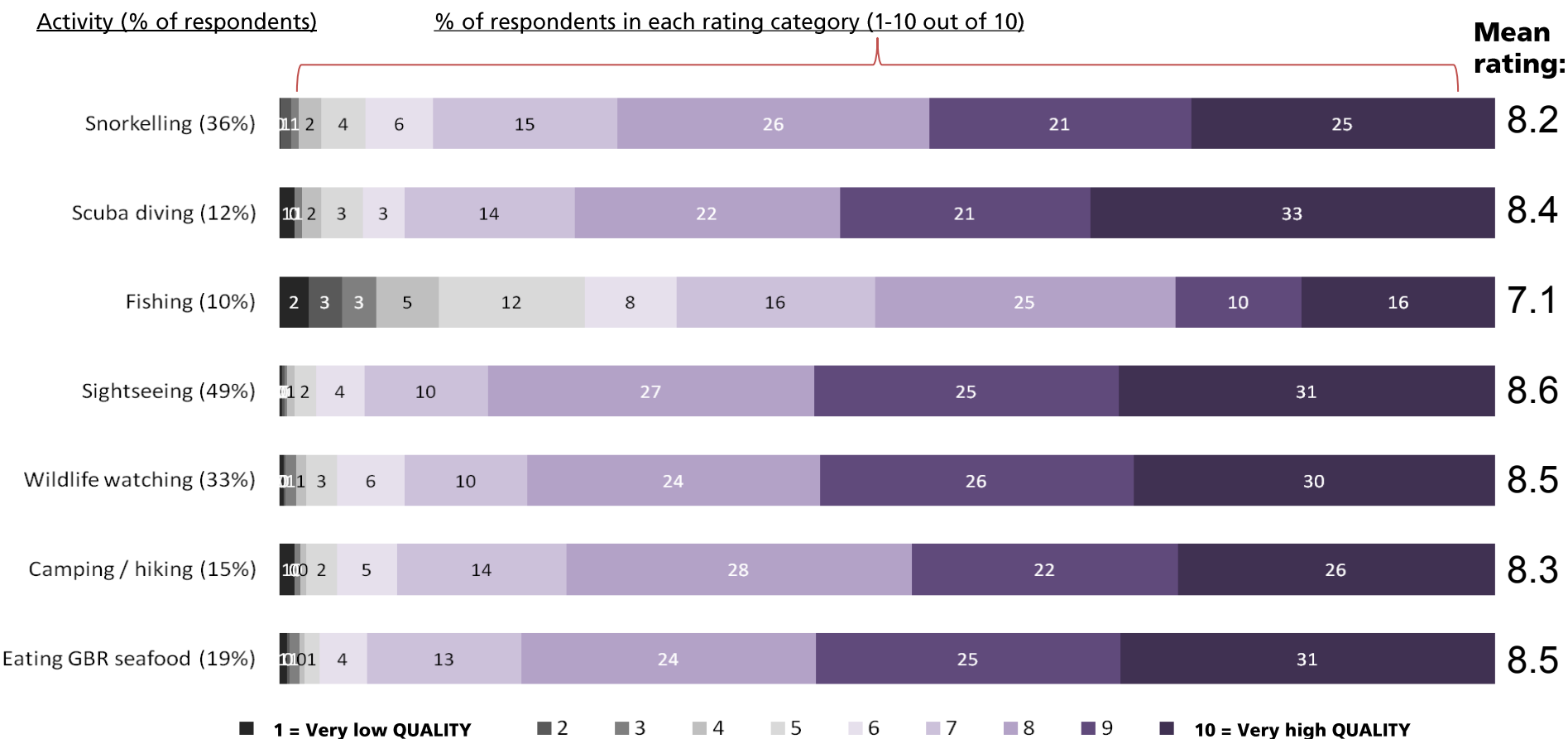


SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

2013 GBR Tourist Survey Results

Patterns of use: activities and perceived quality

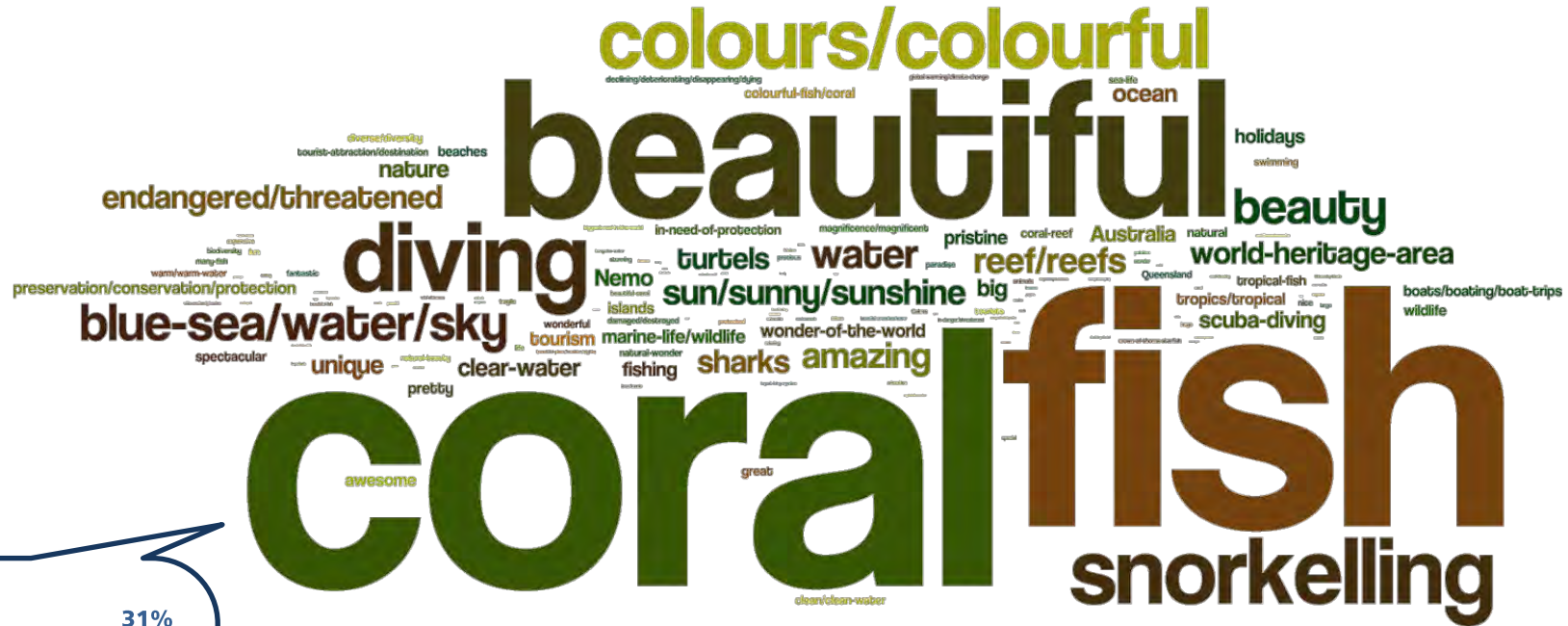


SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

"What are the first words that come to mind when you think of the Great Barrier Reef?"



Coral	31%
Fish	29%
Beautiful	16%
Diving	8%
Snorkelling	8%
Colours/colourful	7%
Blue sea/water/sky	4%
Beauty	4%
Water	4%
Amazing	3%
Endangered/threatened	3%

Coding of open-ended responses:

of tourists surveyed = 2621

Total # of words/phrases listed = 6346

Total # of distinct set of words/concepts (recoded) = 643

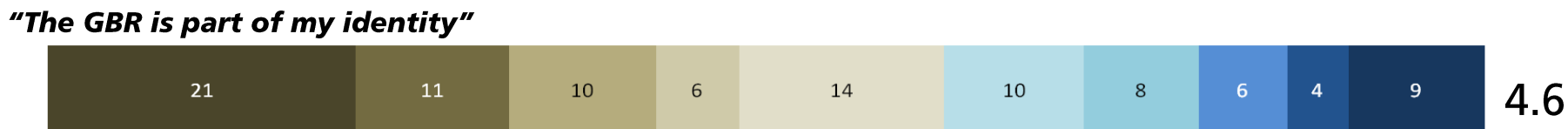
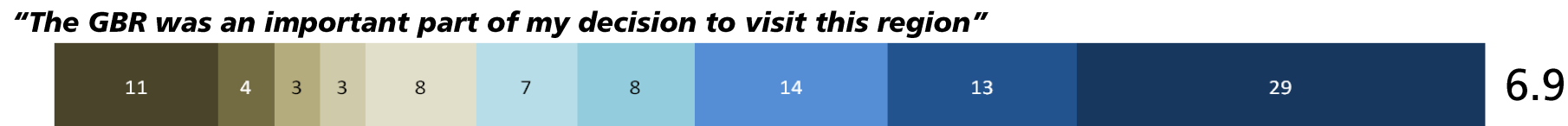
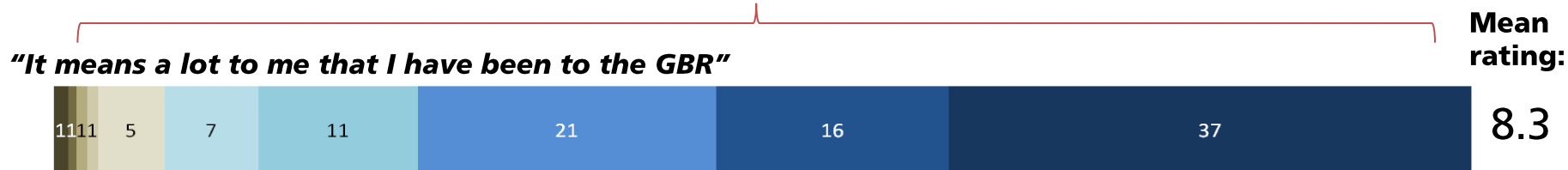
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

GBR Relationship

% of respondents in each rating category (1-10 out of 10)



1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

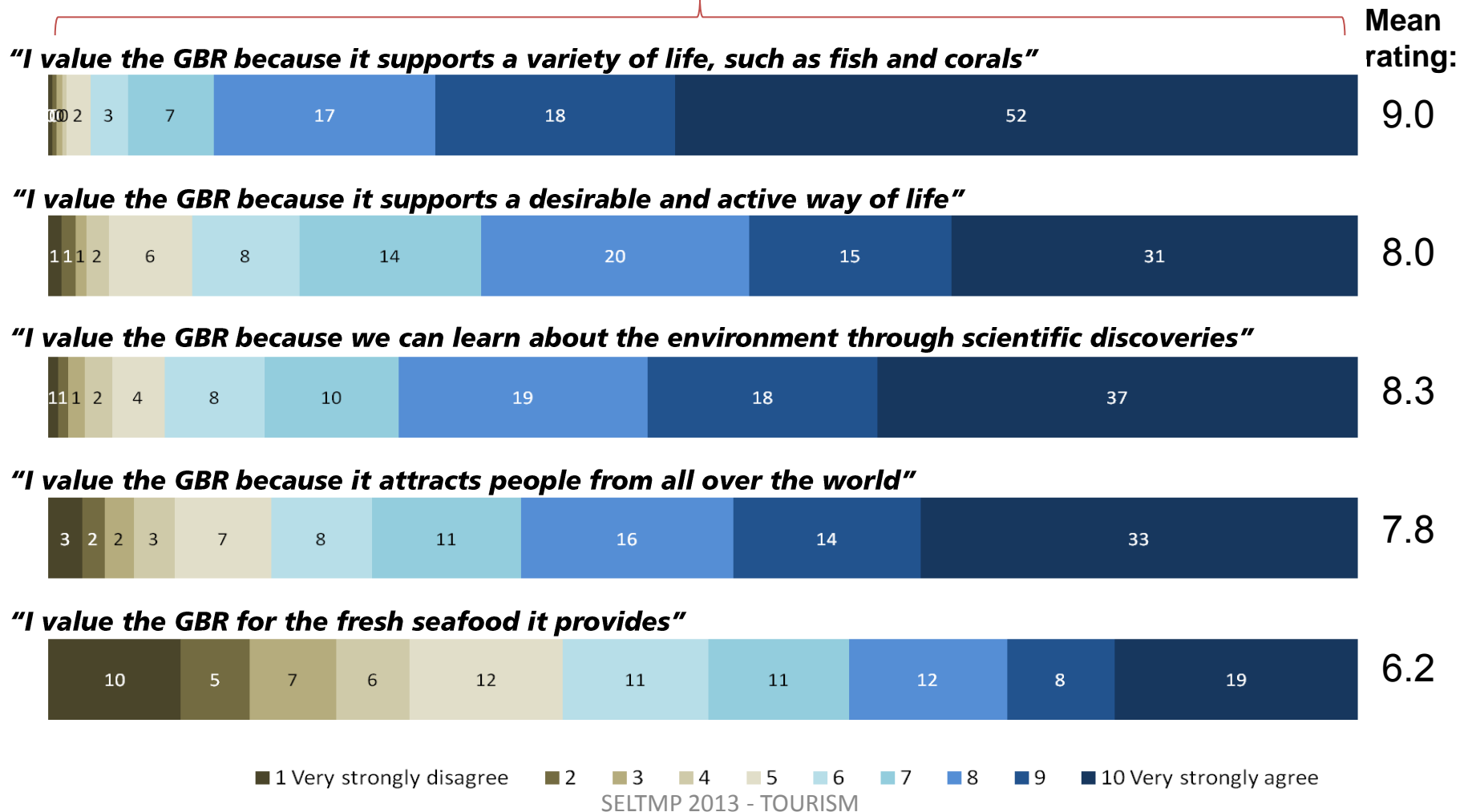
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

GBR values

% of respondents in each rating category (1-10 out of 10)



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

GBR perceptions

% of respondents in each rating category (1-10 out of 10)

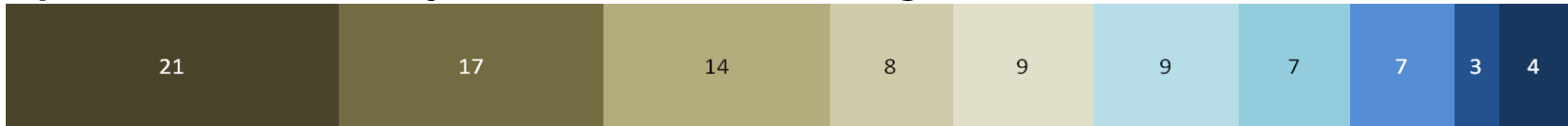
"The aesthetic beauty of the GBR is outstanding"



Mean rating:

9.0

"The place that I most recently visited in the GBR is NOT in great condition"



4.0

"I feel optimistic about the future of the GBR"



6.2

1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

GBR stewardship

% of respondents in each rating category (1-10 out of 10)

"I would like to do more to help protect the GBR"



Mean rating:

7.0

"I would NOT be personally affected if the health of the GBR declined"



4.3

"I would like to learn more about the condition of the GBR"



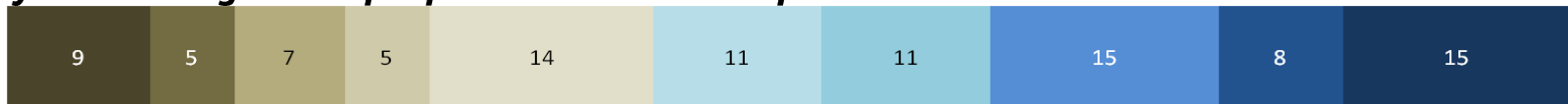
6.8

"I CANNOT make a personal difference in improving the health of the GBR"



5.1

"I try to encourage other people to reduce their impacts on the GBR"



6.1

1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013 - TOURISM

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

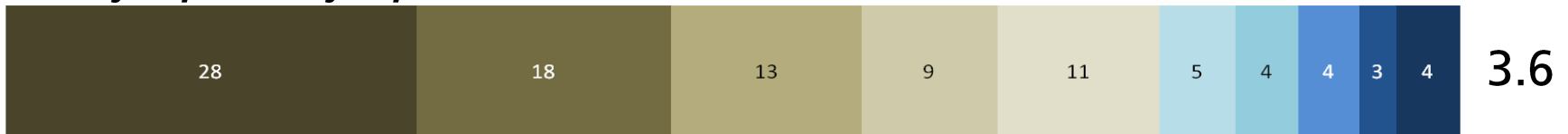
2013 GBR Tourist Survey Results

GBR stewardship

% of respondents in each rating category (1-10 out of 10)

Mean
rating:

"It is NOT my responsibility to protect the GBR"



"Tourism operators should take steps to reduce their impacts on the GBR"



"It is the responsibility of all Australians to protect the GBR"



1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Strength of belief in action

% of respondents in each rating category (1-10 out of 10)

"I have the necessary knowledge and skills to reduce any impact that I might have on the GBR"



**Mean
rating:**

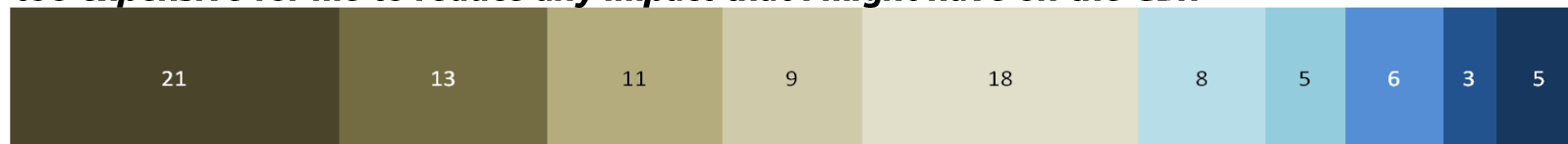
5.3

"I do NOT have the time and opportunity required to reduce any impact that I might have on the GBR"



5.3

"It is too expensive for me to reduce any impact that I might have on the GBR"



4.2

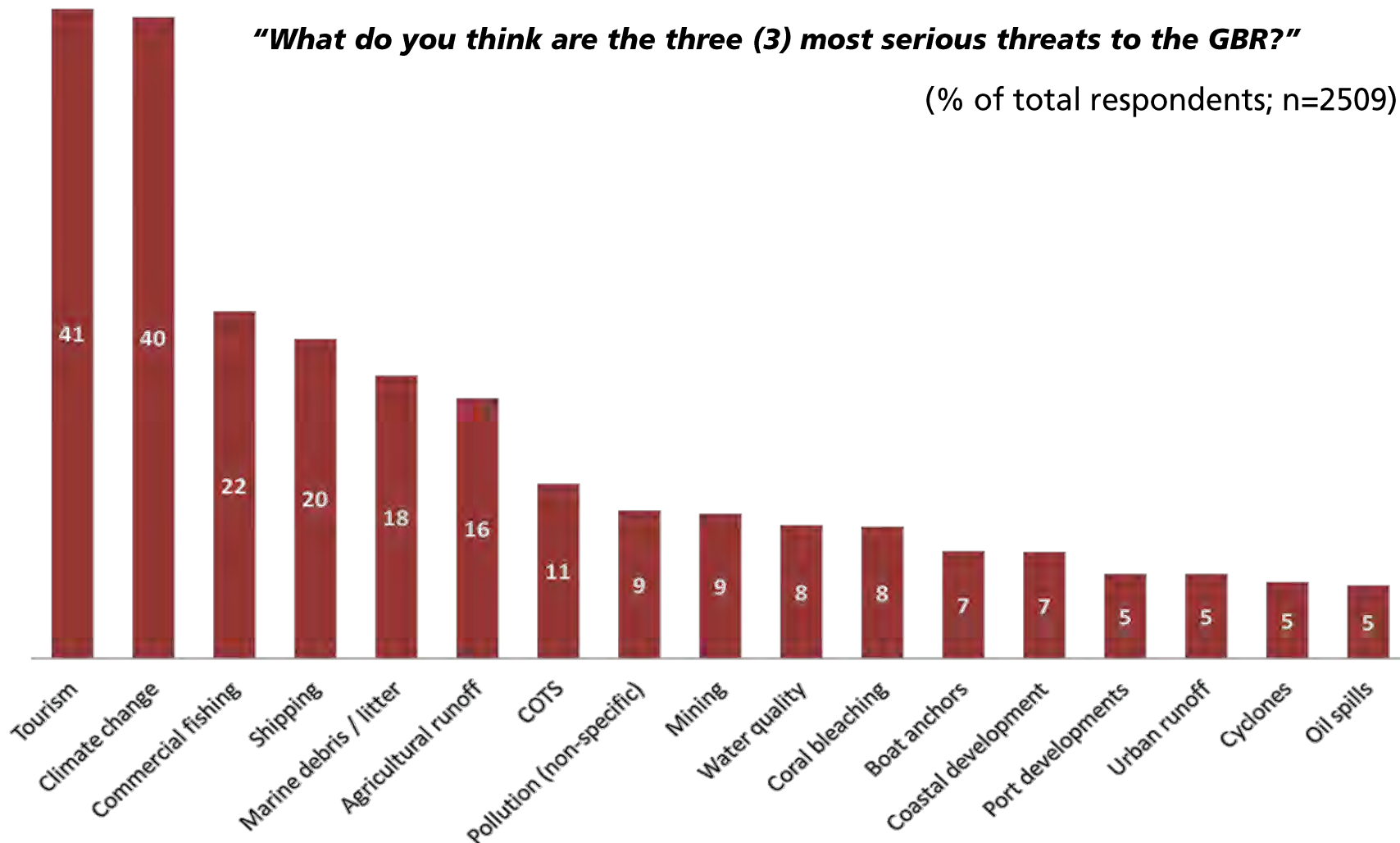
1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Perceived threats to the GBR



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

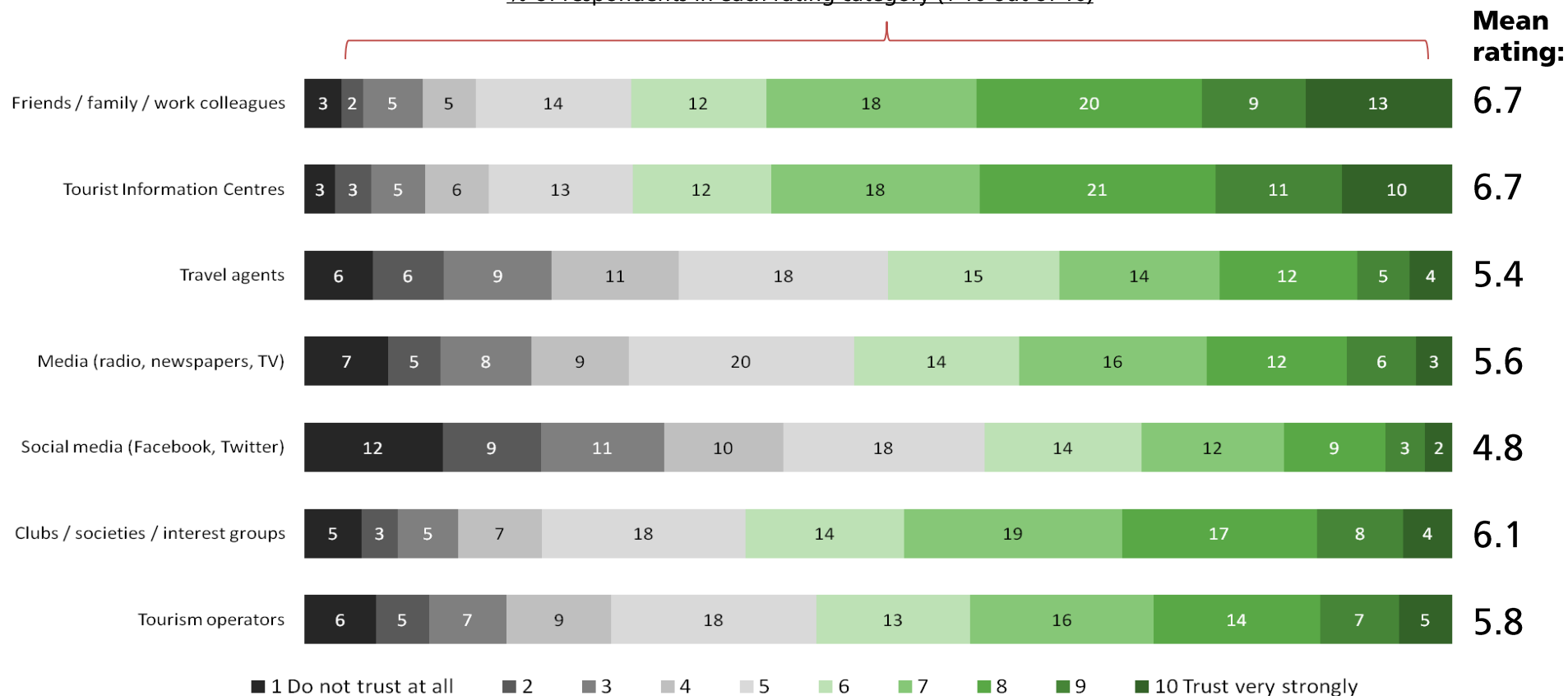
PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Networks and trust

“How much do you trust the information you receive about the GBR from the following groups?”

% of respondents in each rating category (1-10 out of 10)



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Environmental behaviours

"How often do you do the following?"

% of respondents in each category

Recycle



Prioritise environmentally friendly products when shopping



Purchase carbon offsets to counter emissions



Choose accommodation based on their 'green' credentials



Choose a tour operator based on their 'green' credentials



■ Never

■ Sometimes

■ Often

■ Always

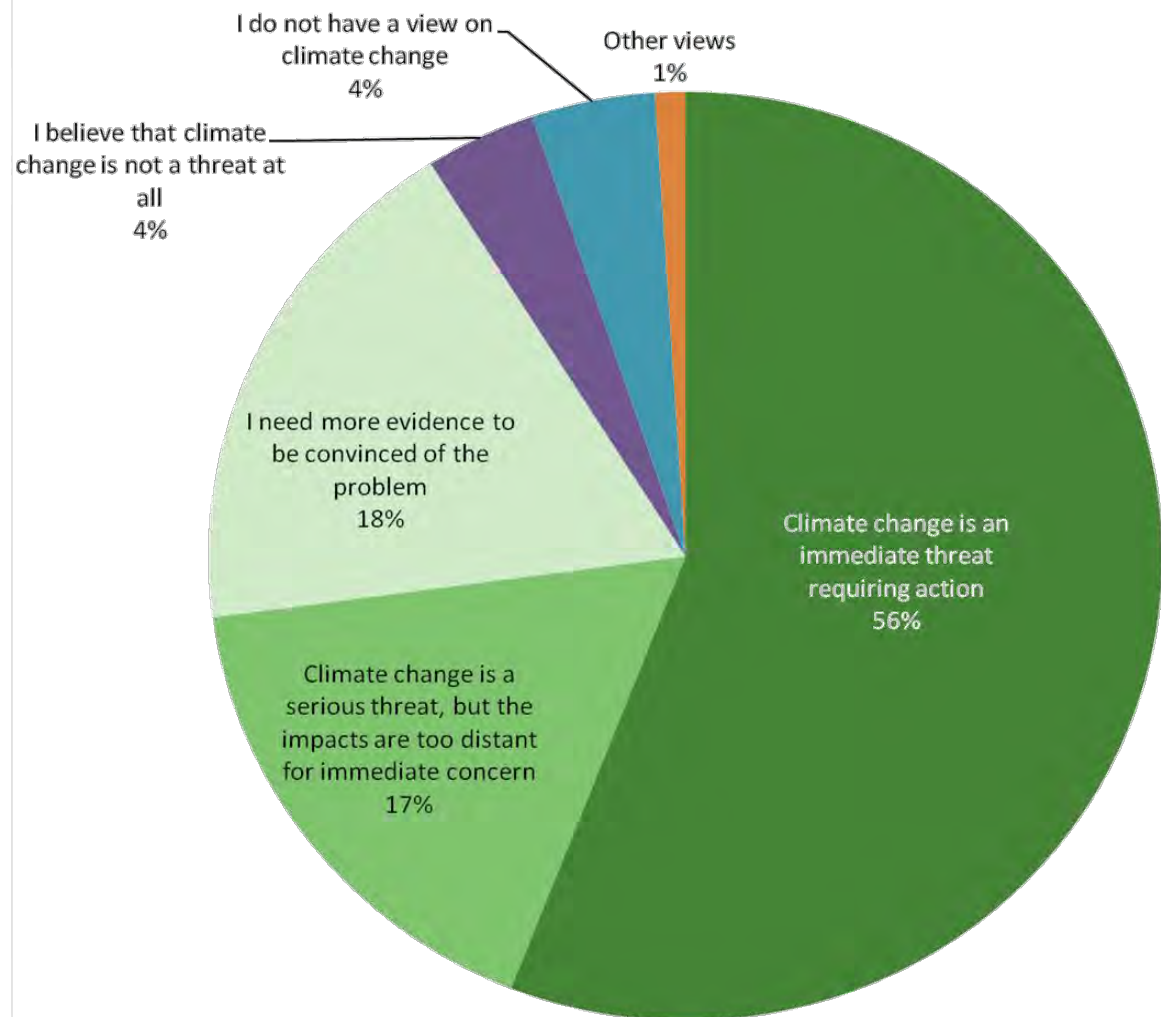
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Climate change beliefs

"Which of the following statements best describes your beliefs about climate change?"



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBRMP permits for tourism activities

Total tourism permits

Far Northern	: 561
Cairns/Cooktown	: 692
Townsville-Whit	: 843
Mackay-Capricorn	: 623
TOTAL (GBRMP)	: 1073*

Total permits by activity*

Snorkelling	: 900
Scuba diving	: 812
Fishing	: 819
Motorised watersports	: 116
Non-motorised w'sports	: 582
Scenic flights	: 68
Whale watching	: 47
Other activities	: 3490

**Note: some permits may be operable in more than one management area. Individual operators may own multiple permits.*

¹¹Source: GBRMPA (2013)

Snorkelling

Far Northern	: 516
Cairns/Cooktown	: 628
Townsville-Whit	: 705
Mackay-Capricorn	: 568

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Scuba diving

Far Northern	: 495
Cairns/Cooktown	: 582
Townsville-Whit	: 649
Mackay-Capricorn	: 538

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Fishing

Far Northern	: 502
Cairns/Cooktown	: 589
Townsville-Whit	: 657
Mackay-Capricorn	: 543

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Motorised watersports

Far Northern	: 57
Cairns/Cooktown	: 70
Townsville-Whit	: 97
Mackay-Capricorn	: 65

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Non-motorised watersports

Far Northern	: 380
Cairns/Cooktown	: 426
Townsville-Whit	: 487
Mackay-Capricorn	: 418

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Scenic flights

Far Northern	: 36
Cairns/Cooktown	: 43
Townsville-Whit	: 53
Mackay-Capricorn	: 42

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

¹¹GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBRMP permits for tourism activities

Whale watching

Far Northern	: 32
Cairns/Cooktown	: 33
Townsville-Whit	: 42
Mackay-Capricorn	: 31

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Glass-bottom boat / semi-submersible (coral viewing)

Far Northern	: 10
Cairns/Cooktown	: 12
Townsville-Whit	: 11
Mackay-Capricorn	: 11

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Fish feeding

Far Northern	: 455
Cairns/Cooktown	: 544
Townsville-Whit	: 611
Mackay-Capricorn	: 498

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Sailing

Far Northern	: 3
Cairns/Cooktown	: 5
Townsville-Whit	: 5
Mackay-Capricorn	: 3

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Sail training

Far Northern	: 9
Cairns/Cooktown	: 17
Townsville-Whit	: 17
Mackay-Capricorn	: 17

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Reef walking

Far Northern	: 7
Cairns/Cooktown	: 7
Townsville-Whit	: 10
Mackay-Capricorn	: 11

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Hire of bareboats

Far Northern	: 3
Cairns/Cooktown	: 4
Townsville-Whit	: 68
Mackay-Capricorn	: 8

**Note: some permits may be operable in more than one management area.*

¹¹Source: GBRMPA (2013)

Hire operations

Far Northern	: 5
Cairns/Cooktown	: 30
Townsville-Whit	: 61
Mackay-Capricorn	: 27

**Note: some permits may be operable in more than one management area.*

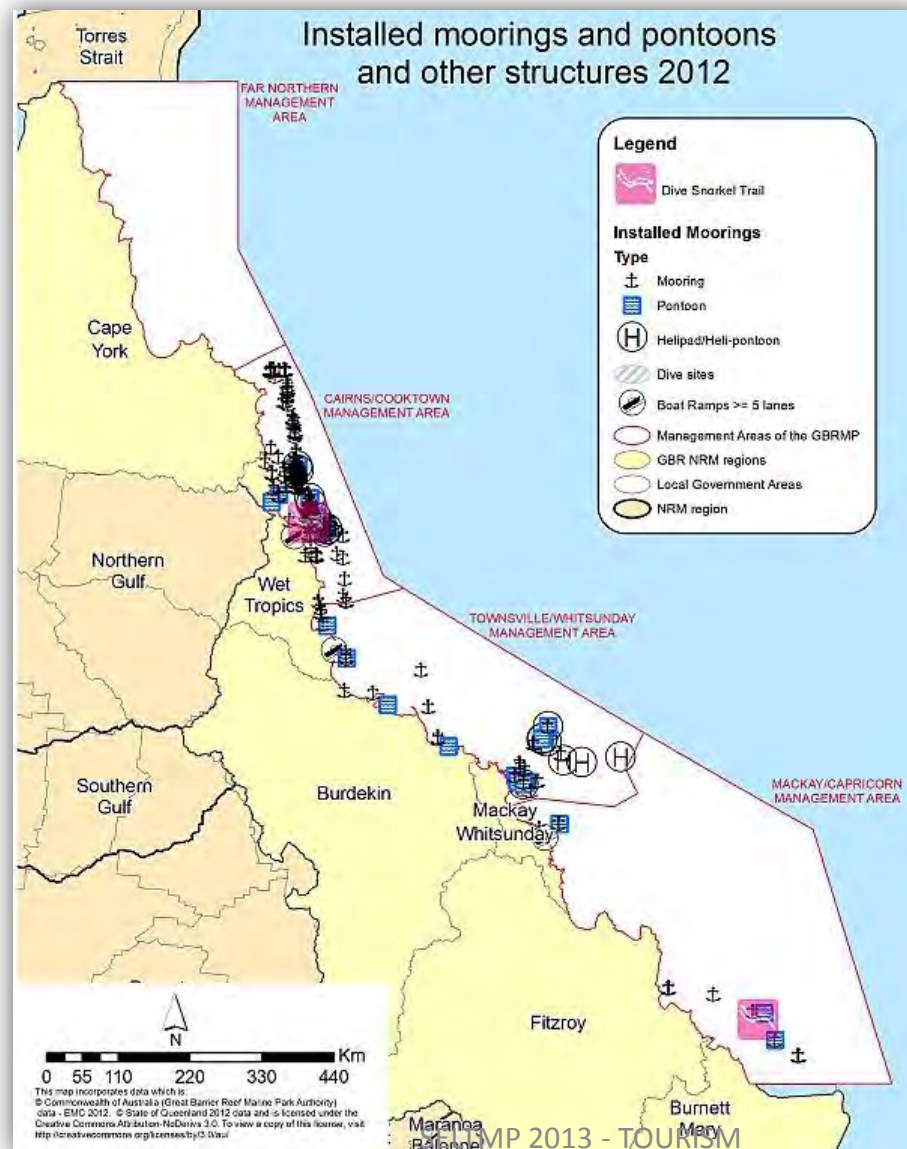
¹¹Source: GBRMPA (2013)

¹¹GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

Tourism infrastructure in the GBRMP



¹¹GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR tourism industry scale

Number of tourism operations advertising on World Wide Web

Diving & snorkeling day trip operations

Cape York	: 3
Terrain FNQ	: 68
Burdekin	: 12
Mackay-Whit	: 35
Fitzroy Basin	: 3
Burnett Mary	: 3
TOTAL (GBR)	: 124

Source: Systematic web search Apr2013.

Whale watching

Cape York	: 0
Terrain FNQ	: 6
Burdekin	: 0
Mackay-Whit	: 4
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 10

Source: Systematic web search Apr2013.

Reef pontoon operators

Cape York	: 0
Terrain FNQ	: 4
Burdekin	: 0
Mackay-Whit	: 2
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 6

Source: Systematic web search Apr2013.

Charter fishing operations

Cape York	: 21
Terrain FNQ	: 32
Burdekin	: 7
Mackay-Whit	: 11
Fitzroy Basin	: 12
Burnett Mary	: 5
TOTAL (GBR)	: 88

Source: Systematic web search Apr2013.

Kayak tours

Cape York	: 2
Terrain FNQ	: 5
Burdekin	: 3
Mackay-Whit	: 6
Fitzroy Basin	: 0
Burnett Mary	: 1
TOTAL (GBR)	: 17

Source: Systematic web search Apr2013.

Bareboat companies

Cape York	: 0
Terrain FNQ	: 4
Burdekin	: 0
Mackay-Whit	: 12
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 16

Source: Systematic web search Apr2013.

Reef helicopter operations

Cape York	: 0
Terrain FNQ	: 2
Burdekin	: 0
Mackay-Whit	: 1
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 3

Source: Systematic web search Apr2013.

Island/coral cay day trips

Cape York	: 1
Terrain FNQ	: 17
Burdekin	: 0
Mackay-Whit	: 11
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 28

Source: Systematic web search Apr2013.

Information obtained via systematic web search, April 2013.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR tourism industry scale

Number of tourism operations advertising on World Wide Web

Island resorts

Cape York	: 7
Terrain FNQ	: 9
Burdekin	: 16
Mackay-Whit	: 20
Fitzroy Basin	: 2
Burnett Mary	: 1
TOTAL (GBR)	: 55

Source: Systematic web search Apr2013.

Live-aboard dive operations

Cape York	: 2
Terrain FNQ	: 57
Burdekin	: 8
Mackay-Whit	: 18
Fitzroy Basin	: 3
Burnett Mary	: 2
TOTAL (GBR)	: 90

Source: Systematic web search Apr2013.

Live-aboard cruise operations

Cape York	: 3
Terrain FNQ	: 59
Burdekin	: 8
Mackay-Whit	: 35
Fitzroy Basin	: 3
Burnett Mary	: 3
TOTAL (GBR)	: 111

Source: Systematic web search Apr2013.

Ferry operations

Cape York	: 0
Terrain FNQ	: 1
Burdekin	: 1
Mackay-Whit	: 2
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 4

Source: Systematic web search Apr2013.

Add-on tour service operations (e.g. photography)

Cape York	: 0
Terrain FNQ	: 3
Burdekin	: 0
Mackay-Whit	: 2
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 5

Source: Systematic web search Apr2013.

Inshore/creek sight seeing cruises

Cape York	: 12
Terrain FNQ	: 1
Burdekin	: 0
Mackay-Whit	: 0
Fitzroy Basin	: 2
Burnett Mary	: 0
TOTAL (GBR)	: 15

Source: Systematic web search Apr2013.

Scenic flight operations

Cape York	: 0
Terrain FNQ	: 12
Burdekin	: 4
Mackay-Whit	: 7
Fitzroy Basin	: 0
Burnett Mary	: 0
TOTAL (GBR)	: 23

Source: Systematic web search Apr2013.

Information obtained via systematic web search, April 2013.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF
PART B: TOURISM INDUSTRY (social relationship)
GBR Tourism Operator Survey Results
Sample description (n=119 completed surveys)

Operator type

Reef tour <i>(includes dive / snorkel, live-aboard & day trips visiting reefs & islands in the GBRMP)</i>	: 46
Charter fishing	: 28
Island resort / accom.	: 14
Water sports/rental	: 7
Inshore cruise	: 7
Flight / heli	: 6
General charter	: 6
Bareboat charter	: 5
TOTAL	:119

Respondent role(s)

Owner + manager	: 77
Manager	: 39
Other senior role	: 3
TOTAL	:119

Respondent GBR tourism industry experience

Mean (years)	: 14
Min.	: 1
Max.	: 44

Business longevity

Mean (years)	: 18
Min.	: 1
Max.	: 130

Number of employees

Mean	: 22
Min.	: 1
Max.	: 400

Days operating in GBR in previous 12 months

Mean (days)	: 232
Min.	: 0
Max.	: 365

Have insurance for business assets

Yes	: 109
No	: 7
Don't know:	: 3

"What are the first words that come to mind when you think of the Great Barrier Reef?"



Coding of open-ended responses:
of tourist operators surveyed = 119
Total # of words/phrases listed = 268
Total # of distinct words/phrases = 124

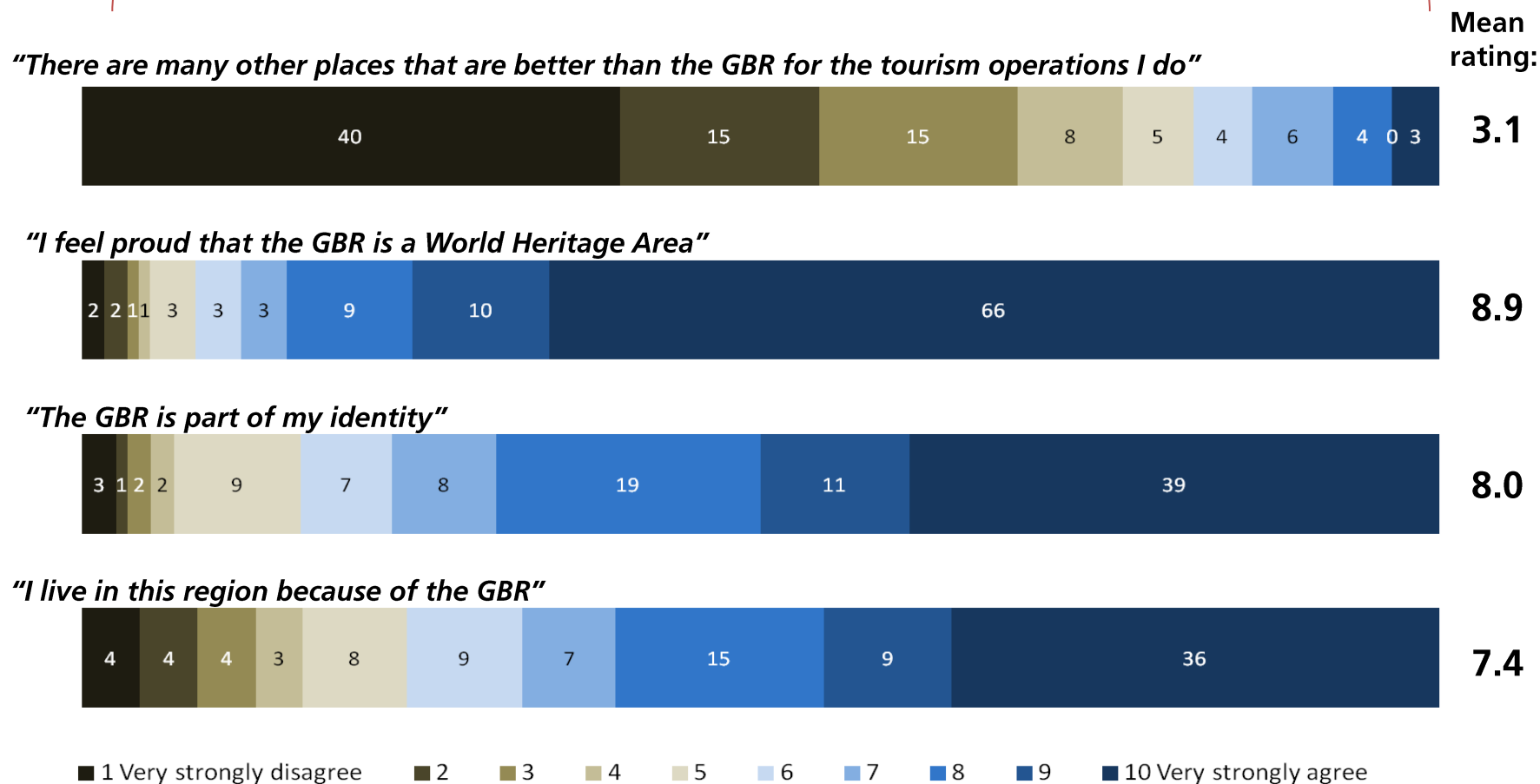
SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR relationship

% of respondents in each rating category (1-10 out of 10)



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Lifestyle values and attachment to place

% of respondents in each rating category (1-10 out of 10)

"I wouldn't want to be anything other than a tourism operator"



"The tourism industry to me is not just a job; it is my lifestyle"



"I plan to still be a tourism operator in 5 years time"



"I do NOT plan to be a resident of this region in 5 years time"



"I am NOT likely to remain operating in this region if events such as cyclones and floods occur more frequently"



1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR values

% of respondents in each rating category (1-10 out of 10)

Mean
rating:

"I value the GBR because it supports a variety of life such as fish and corals"



"I value the GBR because it supports a desirable and active way of life"



"I value the GBR because we can learn about the environment through scientific discoveries"



"I value the GBR because it attracts people from all over the world"



"The GBR is a valuable asset for the economy of this region"



"The GBR contributes to my quality of life and well-being"



1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013 - TOURISM

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR perceptions

% of respondents in each rating category (1-10 out of 10)

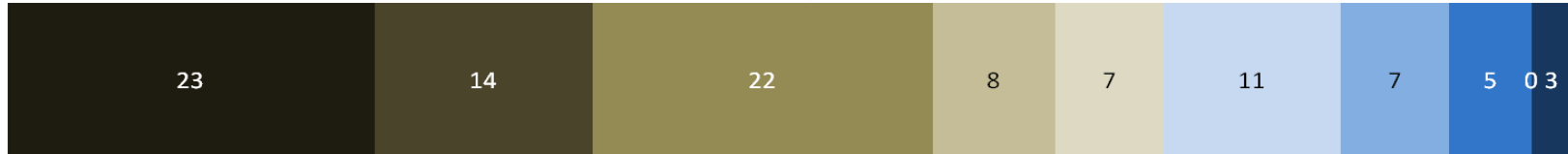
"The aesthetic beauty of the GBR is outstanding"



Mean rating:

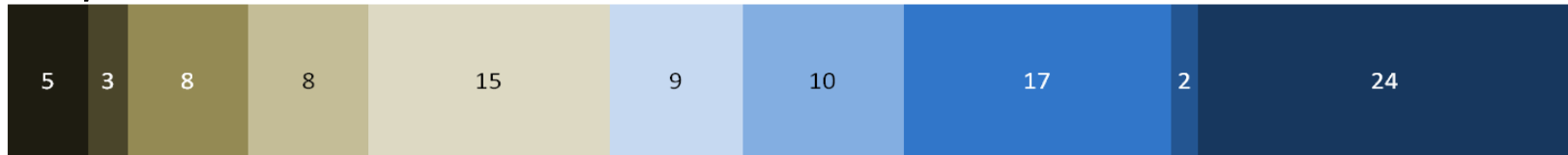
9.2

"The areas that my operation uses in the GBR are NOT in great condition"



3.7

"I am optimistic about the future of the GBR"



6.6

1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Management perceptions

% of respondents in each rating category (1-10 out of 10)

Mean rating:

"I feel confident that the GBR is well managed"



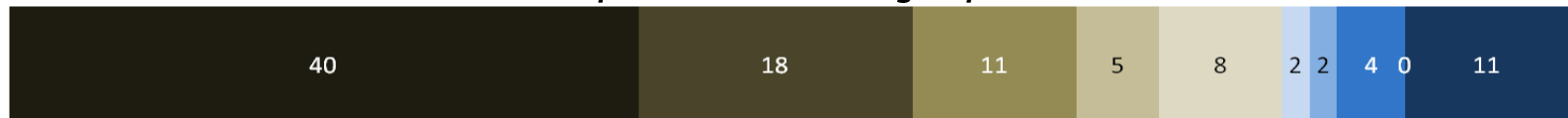
6.1

"I support the current rules and regulations that affect access and use of the GBR"



6.9

"I do NOT have fair access to the GBR compared to other user groups"



3.3

"Industry rules and regulations create too great a burden on my time"



6.2

1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

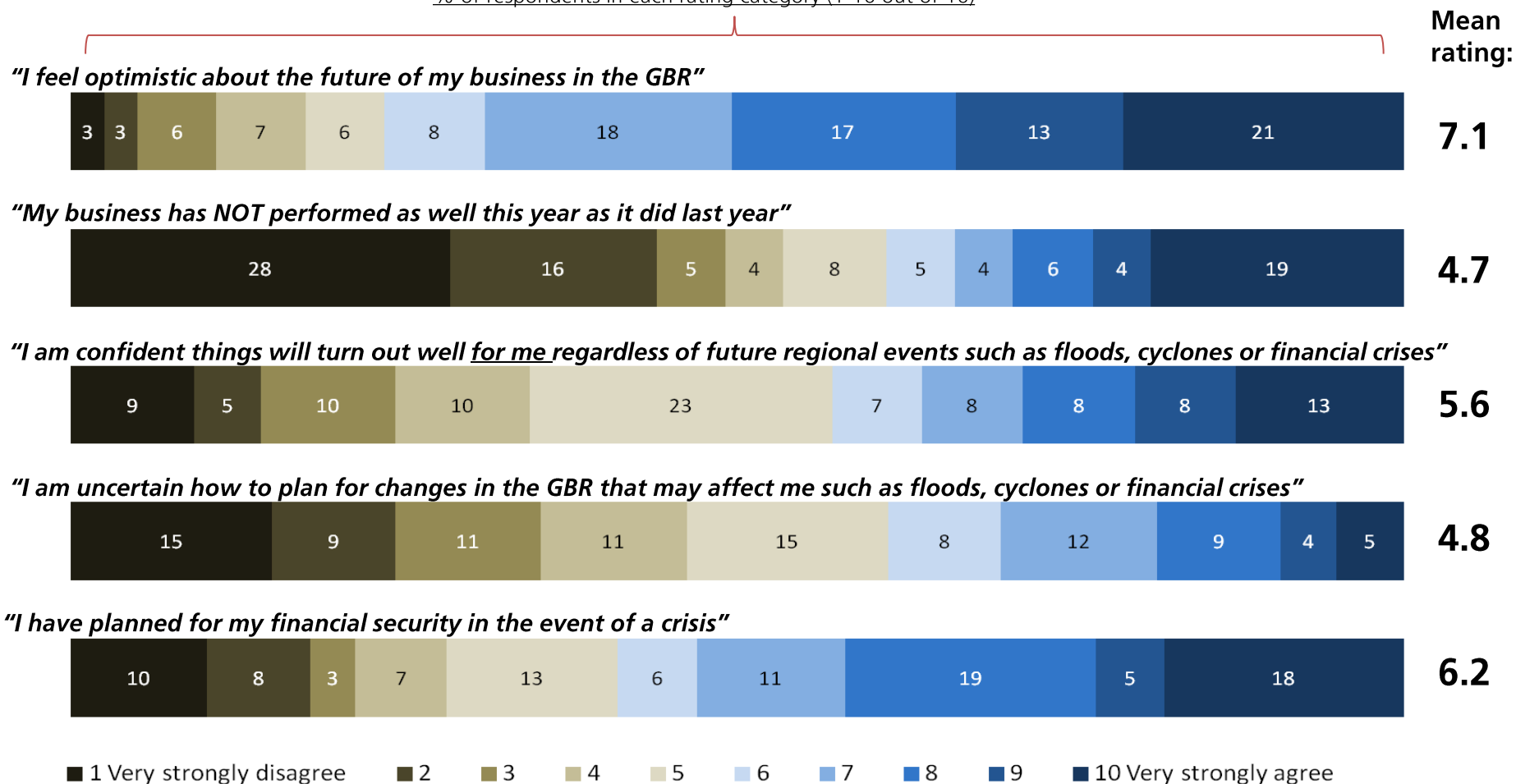
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PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Resilience

% of respondents in each rating category (1-10 out of 10)



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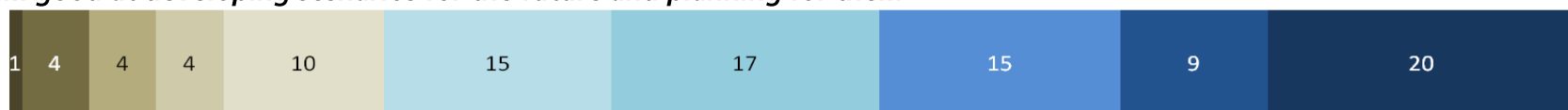
GBR Tourism Operator Survey Results

Adaptive capacity

% of respondents in each rating category (1-10 out of 10)

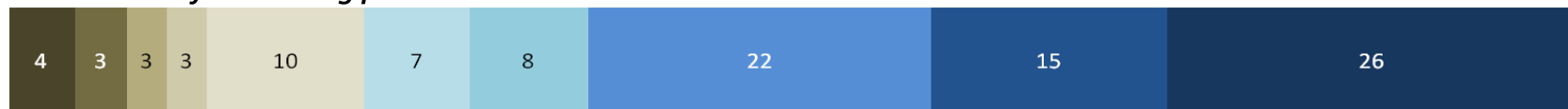
Mean
rating:

"I am good at developing scenarios for the future and planning for them"



7.0

"I discuss new ways of solving problems with others"



7.4

"I am more likely to adapt to changes as a result of floods or cyclones compared to other coastal residents I know"



7.5

"I am interested in learning how to better prepare for significant events, such as the global financial crisis, cyclones and floods"



7.0

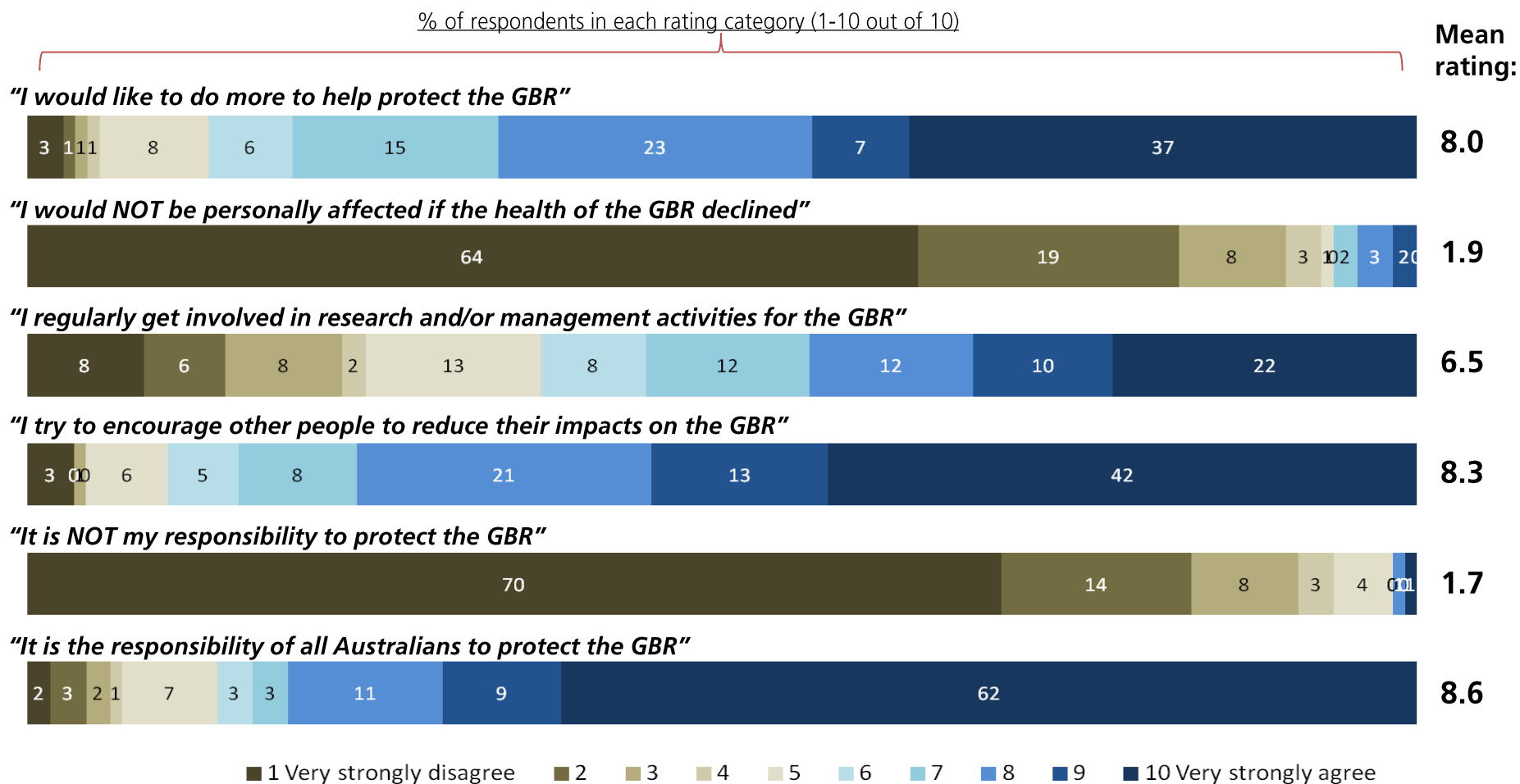
1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR stewardship



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Industry norms and expectations

% of respondents in each rating category (1-10 out of 10)

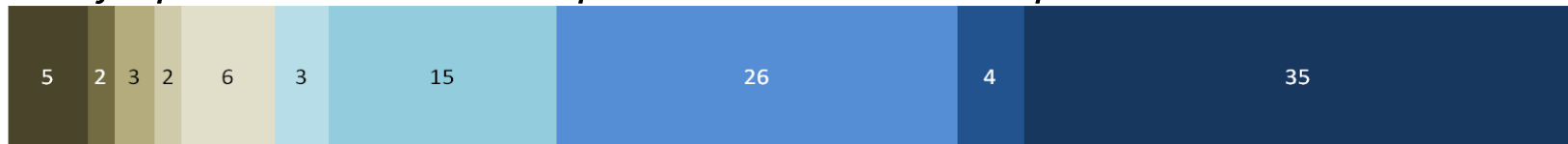
"Tourism operators should take steps to reduce impacts on the GBR"



Mean
rating:

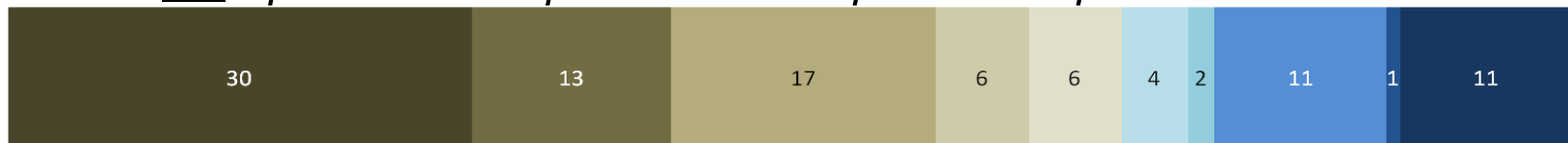
8.6

"Industry expectations are that tourism operators should reduce their impacts on the GBR"



7.7

"Tourists do NOT expect that tourism operators will take steps to reduce impacts on the GBR"



4.0

1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

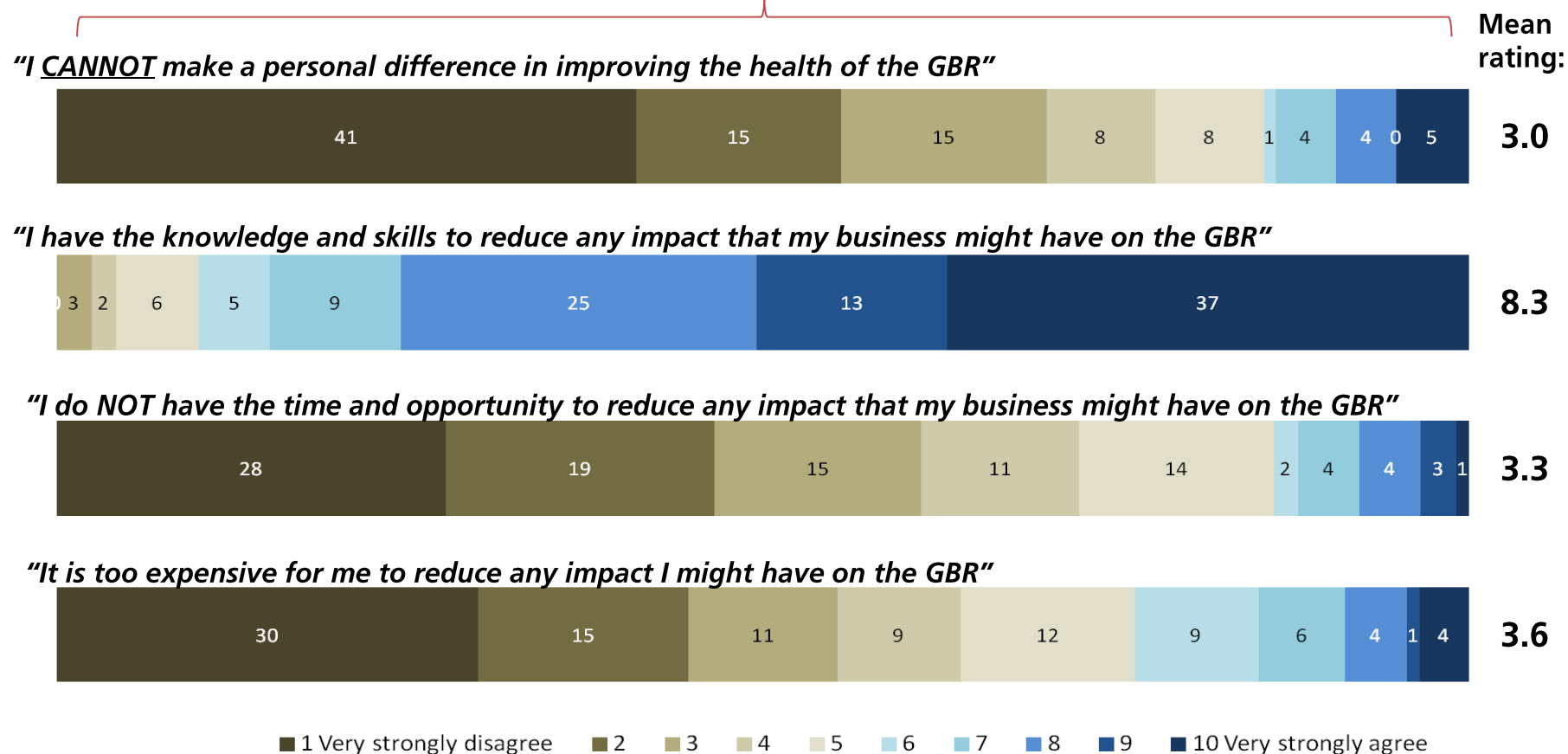
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PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Strength of belief in action

% of respondents in each rating category (1-10 out of 10)

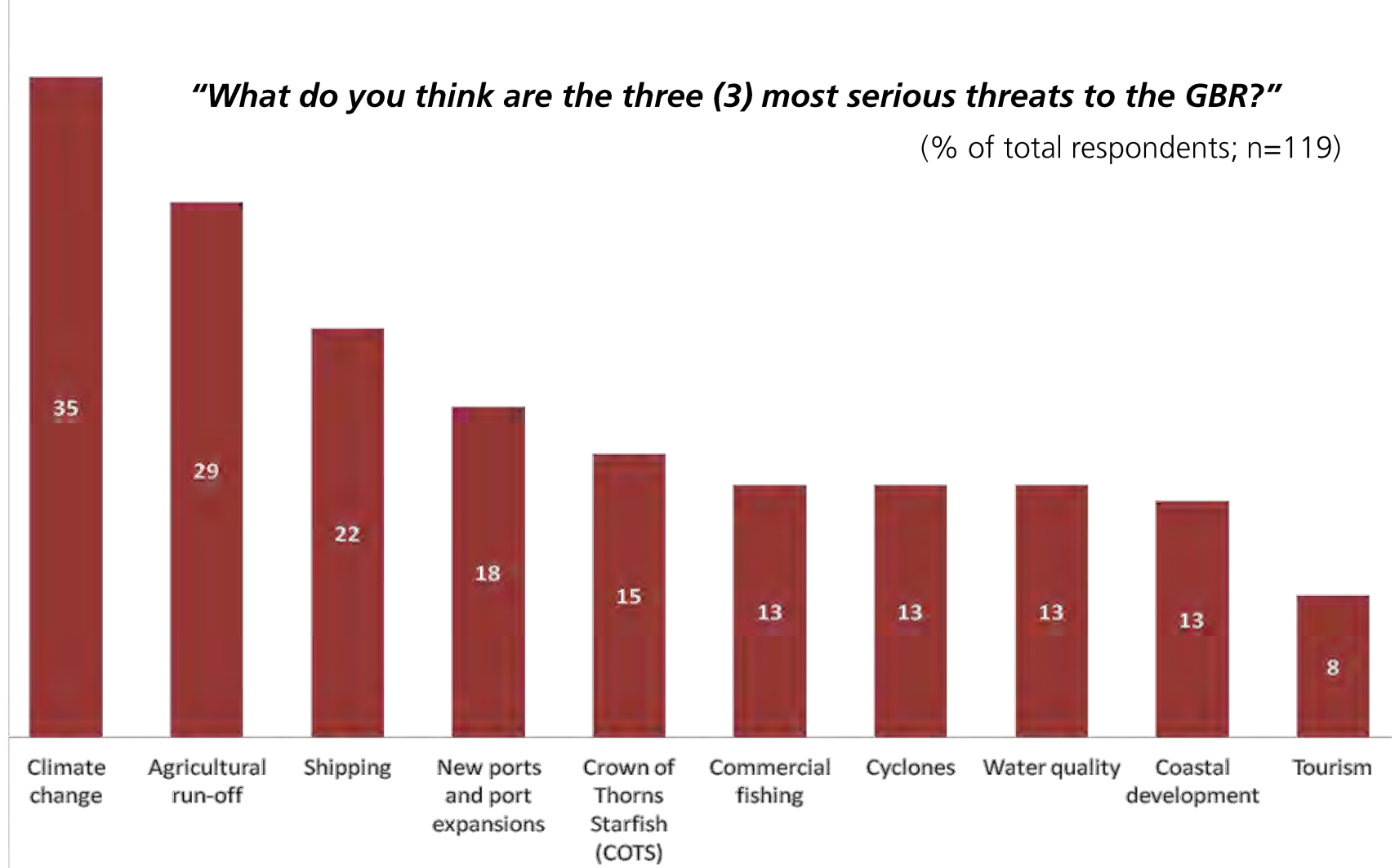


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GBR Tourism Operator Survey Results

Perceived threats to the GBR



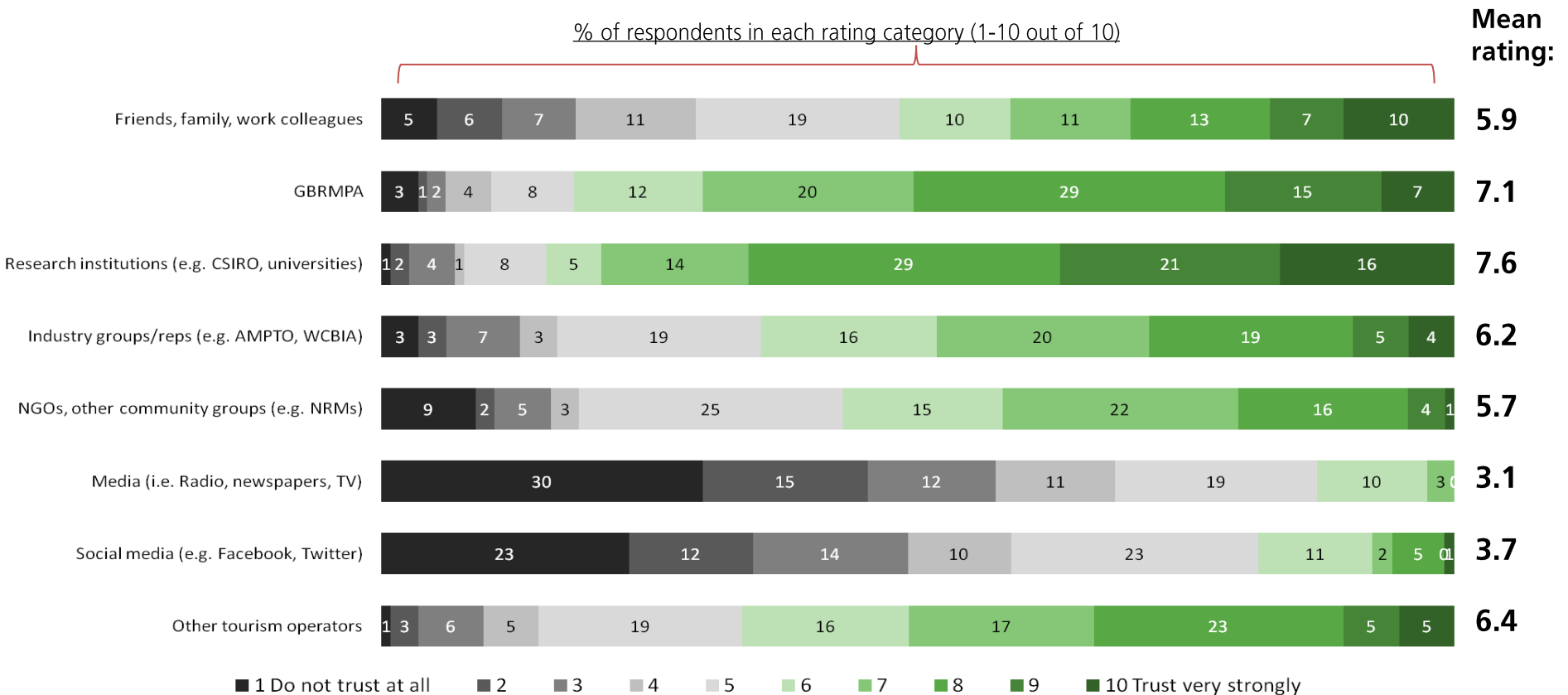
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GBR Tourism Operator Survey Results

Networks and trust

“How much do you trust the information you receive about the GBR from the following groups?”



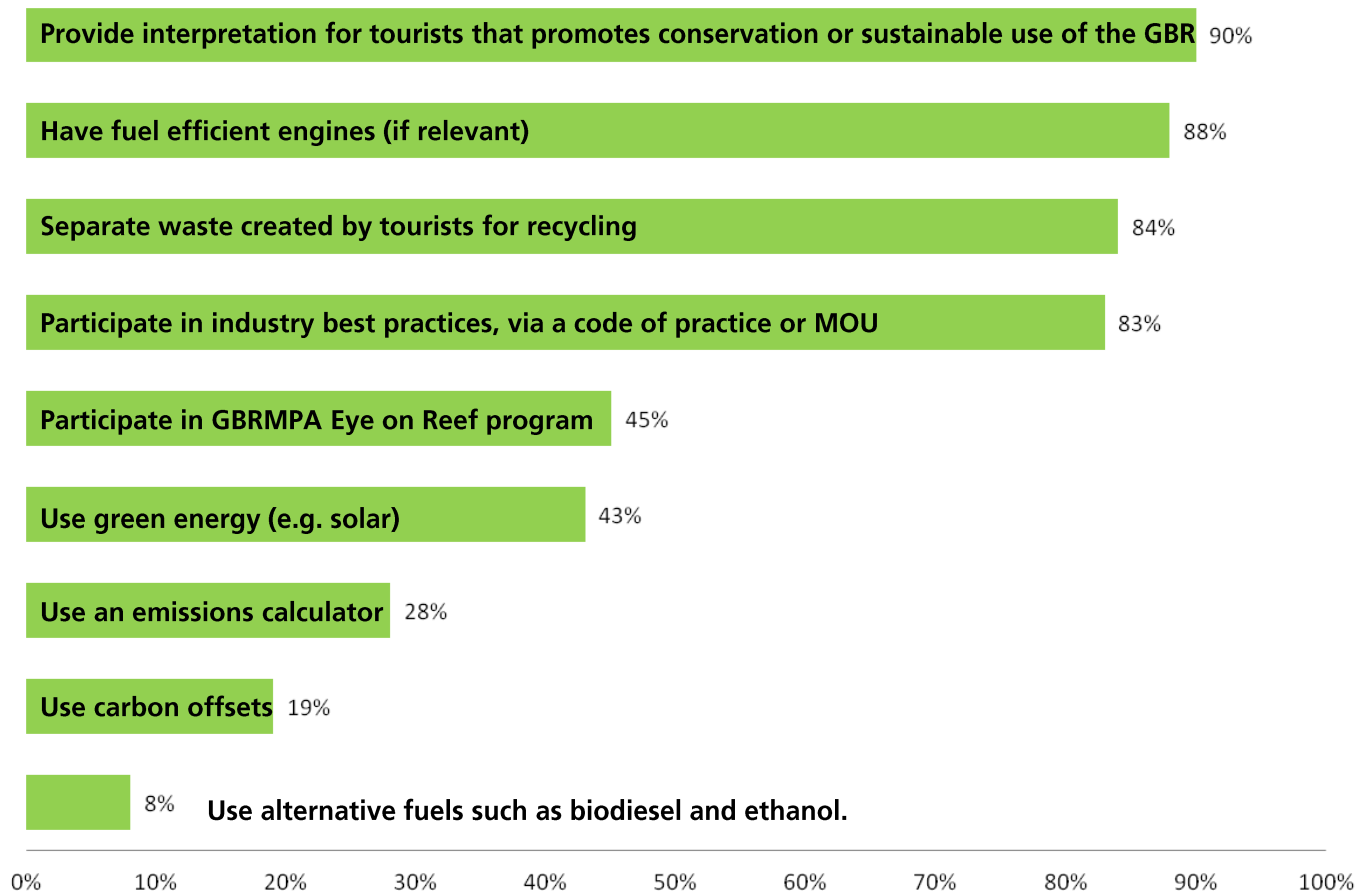
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PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Environmental behaviours

Proportion of respondents participating in environmental behaviour (%)



Number of compliance incident reports (tourism industry subject)

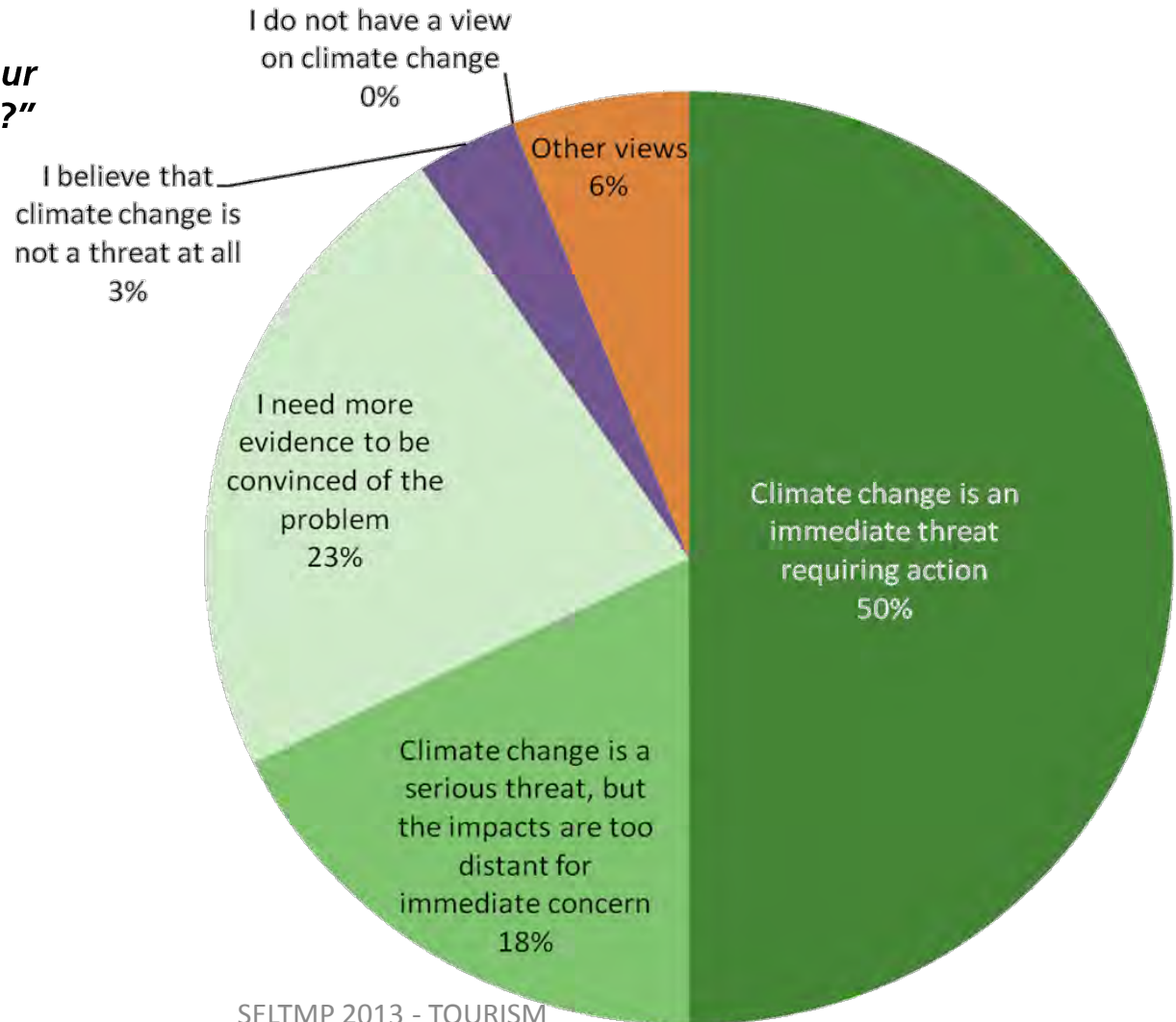
Far Northern	: 4
Cairns/Cooktown	: 41
Tsv/Whit	: 45
Mackay-Capricorn	: 6
Other	: 6
TOTAL (GBR)	: 102

¹²Source: GBRMPA (2013)

¹²GBRMPA (2013). Unpublished data provided by GBRMPA Compliance Section. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF
PART B: TOURISM INDUSTRY (social relationship)
GBR Tourism Operator Survey Results
Climate change beliefs

“Which of the following statements best describes your beliefs about climate change?”



SELTMP 2013: TOURISM IN THE GREAT BARRIER REEF

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- ¹⁰Tourism and Events Queensland (2013). Southern GBR Regional Snapshot, Year Ended June 2013. Available online: http://www.tq.com.au/research/destination-visitor-data/central-queensland-southern-great-barrier-reef-and-bundaberg/southern-great-barrier-reef/southern-great-barrier-reef_home.cfm
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