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Technical Report

The Social and Economic Long Term Monitoring Program (SELTMP) 2014

Tourism in the Great Barrier Reef



Matt Curnock, Nadine Marshall, Renae Tobin, Samantha Stone-Jovicich,
Erin Bohensky, Petina Pert, Jeremy Goldberg, Margaret Gooch,
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Reef &
Rainforest
RESEARCH CENTRE

The Social and Economic Long Term Monitoring Program (SELTMP) 2014 Tourism in the Great Barrier Reef

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2014

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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. Primary data are included from SELTMP surveys conducted over mid 2013, representing 2788 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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What is SELTMP?

The Social and Economic Long Term Monitoring Program for the Great Barrier Reef (SELTMP) describes conditions and trends of the human dimension of the Great Barrier Reef (GBR) using both existing datasets (known as secondary data) and primary data. SELTMP was established in 2011 in response to Reef managers' and stakeholders' growing need for comprehensive social and economic data describing human activities and industries in the GBR, to enable the identification of socio-economic trends and drivers of change, and to assist with day-to-day management, planning and policy for the sustainable use of the Reef.

Long-term monitoring offers Reef managers, industries and communities the opportunity to understand the current status of GBR users, industries and communities, including those dependent on ecological components of the system. Long-term monitoring offers the opportunity to evaluate and plan for the future of each industry and community in the face of environmental and societal challenges, including climate change, environmental degradation, regulatory change, cultural and technological change. SELTMP provides the opportunity to evaluate the effectiveness of management interventions and to assess equity dimensions within the region. Long-term monitoring offers the best scientific approach for conceptualizing and assessing how people are prepared for change and adapt.

The success of a program such as the SELTMP can only occur with well-translated cutting-edge social and economic data and knowledge that directly feeds into current management processes. The science must be excellent, collaborative and must itself adapt as learnings from the monitoring datasets are developed. Hence, the SELTMP is governed by a Steering Committee and a Stakeholder and Scientific (S&S) Advisory Panel (See Figure 1). The design and working model for the SELTMP occurs through working groups. Each working group is led by a core team researcher and comprises members from industry, government and community. Some 100 individuals have so far been involved in Working Group processes to develop and implement SELTMP.

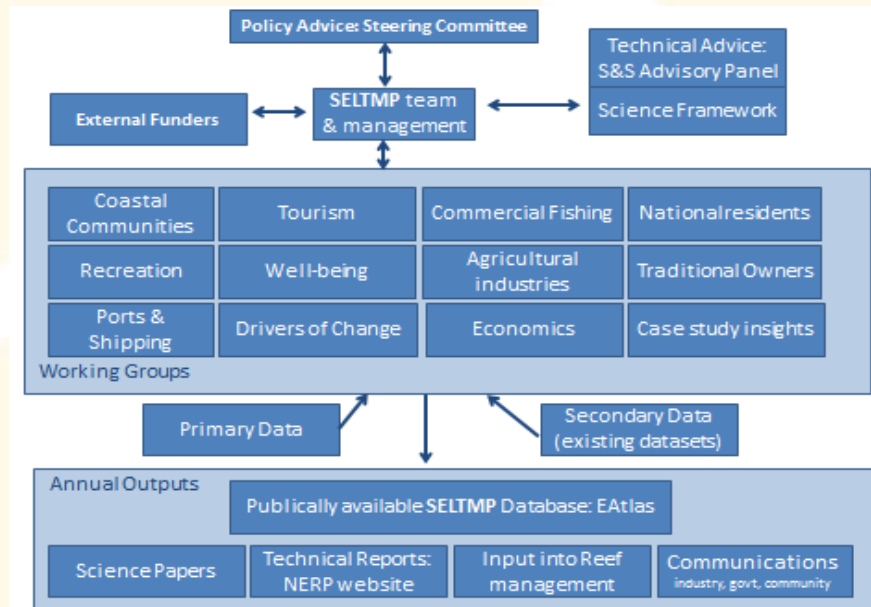


Figure 1. The operational structure of the SELTMP and its key outputs

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SELTMP outputs

SELTMP is strongly guided by both the scientific literature and by its end-users. The variables chosen to represent and monitor the human dimension through time were identified by working group members and by modifying and applying a well-known science framework (the 'Millennium Ecosystem Assessment' model). The resulting SELTMP framework provides a conceptual understanding of how the human dimension connects with the Great Barrier Reef. SELTMP represents one of the first monitoring programs in the world to comprehensively identify and measure socio-economic components of a natural resource system and that are increasingly needed for resource management.

Through monitoring existing regional datasets and undertaking survey work in the region, SELTMP provides annual snapshots of key communities and industry sectors associated with the Reef, including national residents, recreational users, marine tourism, commercial fishing and ports and shipping. SELTMP monitors human use of and dependency on the GBR, human and community well-being (as they relate to the GBR), as well as a range of socio-cultural drivers such as perceptions, values, attitudes and behaviours. We anticipate that SELTMP will collect new data annually.

Annual snapshots of the human dimensions of the Reef and learnings will be communicated via four main outputs:

- (i) **A web-based database.** Each year, the SELTMP web-based database will be updated to reflect the most up-to-date socio-economic data for the Reef and its catchment. Through web-based facilities, researchers will be able to access data for research purposes, industry will be able to use data to inform their planning and management, and Reef and regional managers will be able to better understand the complex social and economic environment within which they operate and use the data in their day-to-day decision-making processes. The current database, held with eAtlas contains survey results from over 8,000 individuals across each of the following user-groups: commercial fishers, tourism operators, tourists, local residents, and Australians.
- (ii) **Technical reports.** Each year a series of technical reports are published that provide the latest information on conditions for that year based on both primary and secondary data. SELTMP 2011 was the inaugural year in which the design and conceptual model were developed. It assembled and presented data from a range of existing sources relevant to people and industries in the GBR and catchment. SELTMP 2012 was refined in terms of its design and included updated secondary data. SELTMP 2013 was the first year in which data gaps were addressed with primary data collected to add to the secondary data. **This report represents Tourism in the GBR within the "SELTMP 2014 Technical Report Series" and includes a wide range of data, reproduced from existing datasets, as well as summary analyses of relevant SELTMP survey data.**
- (iii) **Science papers.** Human trends are analysed and communicated through peer-reviewed scientific literature, that showcase the science value and management application of SELTMP. As SELTMP is currently at the end of its design and implementation phase, there is so far limited longitudinal value. Science papers in the immediate term are drawn from the comprehensive baseline dataset for scientific and policy relevance.
- (iv) **Targeted communications for industry, government and community.** Key findings will be highlighted through media campaigns in which communication products such as 'key findings booklets', press-releases, popular media articles, seminars and conferences, will be developed. For sectoral specific outputs, we will consult and be advised by members of our sectoral working groups.

The SELTMP Framework for Describing the Reef Relationship

The framework chosen to guide the choice of indicators was based on the Millennium Ecosystem Assessment (2003, 2005), which established a 'big picture' conceptual overview of the relationship between people and natural resources for the purposes of assessing ecosystem condition. The Millennium Ecosystem Assessment conceptual framework was developed in consultation with over 2,000 scientists. It is based on the "DPSIR" model which focuses on drivers, pressures, states, impacts on and responses of systems. Human use and dependency, community wellbeing, and the direct and indirect drivers of change can influence the Great Barrier Reef ecosystem and its services at multiple spatial scales, from local to global. For more information on the SELTMP monitoring framework, please see the *SELTMP 2014 Key Findings Technical Report*, available via the NERP website.

i) Use and Dependency

How people use and depend on the GBR. Components include:

- 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

ii) Human and Community Well-being

Societal benefits derived from the environment. Components include:

- Security (e.g. for livelihoods and lifestyles)
- Opportunities (e.g. for access and development)
- Empowerment (e.g. in determining future outcomes)

iii) Drivers of Change

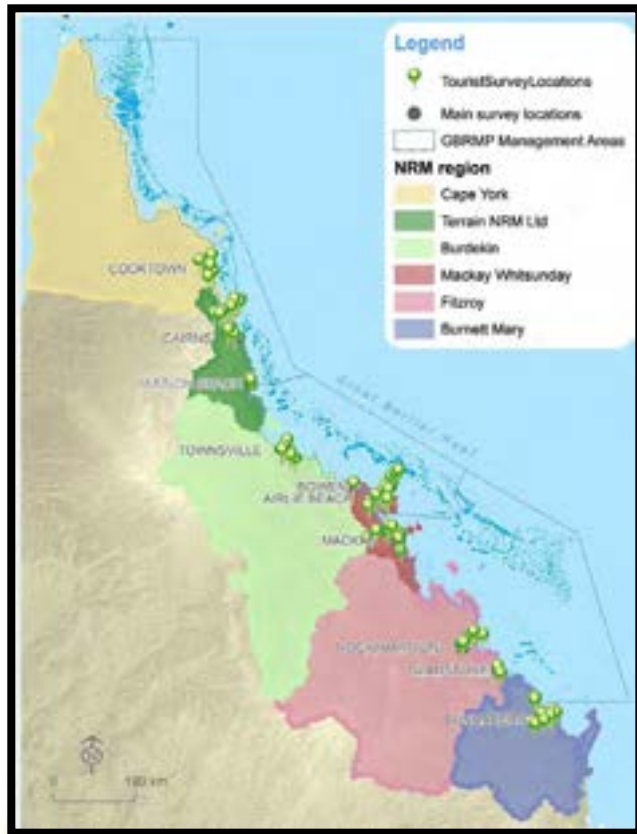
Includes direct and indirect drivers, including (but not limited to):

- Employability
- Environmental stewardship
- Information and Networks
- Sector-specific drivers

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Data Presented in this Report

This technical report presents a snapshot of socio-economic data and indicators relevant to the current state of marine tourism in the Great Barrier Reef region. A range of secondary data and statistics are compiled from publicly available reports, unpublished data from the Australian Bureau of Statistics, Department of Agriculture, Fisheries and Forestry and the Great Barrier Reef Marine Park Authority, and primary data from SELTMP surveys conducted over mid-2013, of tourists and marine tourism operators in the GBR region. Little interpretation of these data is provided in this technical report. Instead, detailed analyses and discussion of SELTMP results can be found in scientific papers and targeted communications for industry, government and community (e.g. See GBRMPA Outlook Report 2014: <http://www.gbrmpa.gov.au/managing-the-reef/great-barrier-reef-outlook-report>). Potential users of SELTMP are encouraged to contact the research team to develop specific research and communications outputs drawing on these data.



2013 SELTMP Survey – methods & response rate

Face-to-face interviews of tourists visiting the GBR region

Visitors to the GBR region (defined as the GBR catchment, bounded by Bundaberg in the south, Cape York in the north and the Great Dividing Range in the west) surveyed via face-to-face interviews, with responses to questions entered into an iPad, using the iSurvey application. For the purposes of this survey, tourists were defined as non-resident visitors to the GBR region. 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. In total, 2877 tourists completed the survey, and the response rate was 53%.

Telephone interviews of tourism operators

Respondents were surveyed via telephone interview, with responses entered directly into the iPad app. Tourism operations were identified initially via a comprehensive web search, followed by snowball sampling once surveys had commenced. From 213 identified marine tourism businesses currently operating in the GBR region, 119 respondents completed the survey (response rate of 76% of operators able to be contacted).

A copy of the survey questions for both tourism operators and GBR tourists is provided in Appendix 1.

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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.

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PART A: TOURISTS



Images (c) Matt Curnock

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PART A: TOURISTS (use and activities)

International visitors to Australia

Totals Visitors

Total Visitors aged >15:
6,147,000

63% had been here before

Total visitor nights: 216M
(+1%)

²Source: Tourism Research Australia
(2014)

Reason for visit

Holiday	: 45%
Visit friends/relatives	: 28%
Business	: 13%
Education	: 6%
Employment	: 4%
Other	: 3%

²Source: Tourism Research Australia
(2014)

Source Countries

New Zealand - 1,115,000
(19%)

China – 708,000 (11.5%)

UK – 624,000 (10.1%)

USA – 5000,000 (8.1%)

²Source: Tourism Research Australia
(2014)

Expenditures

Average trip expenditure:
\$4,897

Average nightly
expenditure: \$139

Total expenditure in Oz:
\$30.1 billion (+7.4%)

²Source: Tourism Research Australia
(2014)

Tours

Packaged Tours:	11%
Organized Tours:	2%

²Source: Tourism Research Australia
(2014)

States Visited

NSW	: 52%
Queensland	: 37%
Victoria	: 33%

²Source: Tourism Research Australia
(2014)

Visitor Nights

NSW:	: 35%
Victoria:	: 22%
Queensland:	: 23%

²Source: Tourism Research Australia
(2014)

Expenditures by region

Sydney	6.1 billion
Melbourne	4.5 billion
Perth	1.8 billion
Brisbane	1.5 billion
TNQ	844 million

²Source: Tourism Research Australia
(2014)

²Tourism Research Australia (2014). International Visitors in Australia. June 2014 Quarterly Results of the International Visitor Survey. Tourism Research Australia. Available online: http://www.tra.gov.au/documents/ivs/International_Visitors_in_Australia_June_2014_Results_of_The_International_Visitors_Survey.html

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PART A: TOURISTS (use and activities)

International visitors to Australia

Totals Visitors by State

QLD	2,065,000
NSW	3,112,000
VIC	2,049,000
Other	1,792,000
Total	7,225,000

²Source: Tourism Research Australia (2014)

Total Visitor Nights

QLD	45,589,000
NSW	74,827,000
VIC	47,425,000
Other	47,551,000
Total	215,391,000

²Source: Tourism Research Australia (2014)

Average Length of Stay

QLD	:22
NSW	:24
VIC	:23
Other	:23
Total	:35

²Source: Tourism Research Australia (2014)

Average length of stay by region (QLD)

TNQ	: 8.9
Townsville	:13.2
Whitsundays	: 6.6
Mackay	:18.1
SGBR	:19.2
QLD Total	:22.4

³Source: Tourism Research Australia (2014)

Total QLD visitors by type

Holiday	1,413,000
Visit friends/relatives –	517,000
Business	158,000
Other	191,000
Total	2,065,000

²Source: Tourism Research Australia (2014)

Total QLD visitors nights by type

Holiday	19,663,000
Visit friends/relatives –	9,829,000
Business	1,243,000
Other	14,697,000
Total	45,589,000

²Source: Tourism Research Australia (2014)

QLD Visitors by region

TNQ	: 696,000
Townsville	: 95,000
Whitsundays	: 185,000
Mackay	: 41,000
SGBR	: 117,000

³Source: Tourism Research Australia (2014)

QLD Visitor nights by region

TNQ	: 6,116,000
Townsville	: 1,250,000
Whitsundays	: 1,227,000
Mackay	: 751,000
SGBR	: 2,248,000

³Source: Tourism Research Australia (2014)

²Tourism Research Australia (2014). International Visitors in Australia. June 2014 Quarterly Results of the International Visitor Survey. Tourism Research Australia. Available online: http://www.tra.gov.au/documents/ivs/International_Visitors_in_Australia_June_2014_Quarterly_Results_of_The_International_Visitors_Survey.html

³Tourism and Events Queensland (2014) Tropical North Queensland Regional Snapshot, Year ended March 2014. Available online: <http://teq.queensland.com/~media/68F04DD61B8A4CB5888F883C1C5DE9C5.ashx>

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PART A: TOURISTS (use and activities)

International visitors to the GBR region

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

Holiday – (641,000; 4,765,000; 7.4)
Visit friends/relatives – (29,000; 444,000; 15.5)
Business – (15,000; 100,000; 6.6)
Total – (696,000; 6,166,000; 8.9)

⁴Source: Tourism and Events Queensland (2014)

⁵Tourism and Events Queensland (2014).

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

Holiday – (76,000; 398,000; 5.2)
Visit friends/relatives – (12,000; 285,000; 23.5)
Business – (n/p n/p n/p)
Total – (95,000; 1,250,000; 13.2)

⁴Source: Tourism and Events Queensland (2014)

⁶Tourism and Events Queensland (2014).

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

Holiday – (179,000; 1,021,000; 5.7)
Visit friends/relatives – (n/p n/p n/p)
Business – (n/p n/p n/p)
Total – (185,000; 1,227,000; 6.6)

⁴Source: Tourism and Events Queensland (2014)

⁷Tourism and Events Queensland (2014).

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

Holiday – (27,000; 171,000; 6.2)
Visit friends/relatives – (10,000; 304,000; 30.9)
Business – (n/p n/p n/p)
Total – (41,000; 751,000; 18.1)

⁴Source: Tourism and Events Queensland (2014)

⁸Tourism and Events Queensland (2014)

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

Holiday – (89,000; 1,066,000; 12.0)
Visit friends/relatives – (14,000; 224,000; 16.5)
Business – (5,000; 85,000; 16.7)
Total – (117,000; 2,248,000; 19.2)

⁴Source: Tourism and Events Queensland (2014)

⁹Tourism and Events Queensland (2014)

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

Holiday – (1,403,000; x; 14)
Visit friends/relatives – (497,000; x; 20.2)
Business – (165,000; x; 8.3)
Total – (2,048,000; x; 22.4)

⁴Source: Tourism and Events Queensland (2014)

⁴Tourism and Events Queensland (2014). International Tourism Snapshot, Year ended July 2014. Available online:

<http://teq.queensland.com/~media/D75CC8512915433DB9DBA61732E6AA50.ashx>

⁵Tourism and Events Queensland (2014). Tropical North Qld Regional Snapshot, Year Ended March 2014. Available online:

<http://teq.queensland.com/~media/68F04DD61B8A4CB5888F883C1C5DE9C5.ashx>

⁶Tourism and Events Queensland (2014). Townsville Regional Snapshot, Year Ended March 2014. Available online:

<http://teq.queensland.com/~media/0FFE528CCFE7482E980D5DE8FD65D7E4.ashx>

⁷Tourism and Events Queensland (2014). Whitsundays Regional Snapshot, Year Ended March 2014. Available online:

<http://teq.queensland.com/~media/40DD334DA6B249CD9628D615C6986FDC.ashx>

⁸Tourism and Events Queensland (2014). Mackay Regional Snapshot, Year Ended March 2014. Available online:

<http://teq.queensland.com/~media/C62E760F7AB5405992E7BAFDC122C862.ashx>

⁹Tourism and Events Queensland (2014). Southern GBR Regional Snapshot, Year Ended March 2014. Available online:

<http://teq.queensland.com/~media/1F959C5F633342FAAA6FB7F40FA3F39F.ashx>

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Domestic travelers in Australia

Totals Visitors

Total Overnight Visitors: 79.0 million aged 15 and over (+5.1%)

Total visitor nights: 294.9 million (+3.1%)

2/3 (68.9 %) travelled within state or territory of residence

¹⁰Source: Tourism Research Australia (2013)

Reason for trip

Holiday : 40%
Visit friends/relatives : 35%
Business : 19%

Expenditure

Overnight : \$50.3 bil (+5.7%)
Day : \$18.2 bil (+0.6%)

¹⁰Source: Tourism Research Australia (2013)

Accommodation

Friends/relatives : 38.3%
Hotel/resort/motel : 24.8%

Transportation

Private vehicle : 67.7%
Air transport : 30.5%

¹⁰Source: Tourism Research Australia (2013)

Totals Overnight Visitors by State

QLD : 18,073,000
NSW : 24,866,000
VIC : 19,635,000
Other : 17,541,000
Total : 79,096,000

¹⁰Source: Tourism Research Australia (2013)

Total Visitor Nights by State

QLD : 76,106,000
NSW : 86,747,000
VIC : 59,961,000
Other : 76,167,000
Total : 294,980,000

¹⁰Source: Tourism Research Australia (2013)

Expenditure by domestic overnight visitors by region

Sydney : \$6.1 billion
Melbourne : \$6.2 billion
Sunshine Coast : \$1.7 billion
TNQ : \$1.7 billion

³Source: Tourism Research Australia (2013)

¹⁰Tourism Research Australia (2013)

¹¹Tourism Research Australia (2013)

Average Length of Stay by State

QLD : 4
NSW : 3
VIC : 3
Other : 4.2
Total : 4.0

¹⁰Source: Tourism Research Australia (2013)

³Tourism and Events Queensland (2014) Tropical North Queensland Regional Snapshot, Year ended March 2014. Available online:

<http://teq.queensland.com/~media/68F04DD61B8A4CB5888F883C1C5DE9C5.ashx>

¹⁰Tourism Research Australia (2014). Travel by Australians. March 2013 Quarterly Results of the National Visitor Survey. Tourism Research Australia. Available online:

http://www.tra.gov.au/documents/nvs/Travel_by_Australians_June_2014_results_of_the_National_Visitor_Survey.html

¹¹Tourism and Events Queensland (2014) Sunshine Coast Regional Snapshot, Year ended March 2014. Available online:

<http://teq.queensland.com/~media/43ADBFA65F264D169A580D20C7B9D289.ashx>

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Domestic travelers visiting Queensland

Total Overnight QLD visitors by type

Holiday –	7,625,000
Visit friends/relatives –	6,238,000
Business –	3,457,000
Other –	1,008,000
Total –	18,073,000

¹⁰Source: Tourism Research Australia (2014)

Total QLD visitor nights by type

Holiday –	34,519,000
Visit friends/relatives –	24,108,000
Business –	12,884,000
Other –	4,009,000
Total –	76,106,000

¹⁰Source: Tourism Research Australia (2014)

QLD Visitors by region

SGBR –	1,670,000
Mackay –	674,000
Whitsundays –	495,000
Townsville –	936,000
TNQ –	1,626,000

¹²Source: Tourism and Events Queensland (2013)

QLD Visitor nights by region

SGBR –	5,896,000
Mackay –	2,688,000
Whitsundays –	2,132,000
Townsville –	3,731,000
TNQ –	8,677,000
Total –	73,753,000

¹²Source: Tourism and Events Queensland (2013)

Average length of stay by region

SGBR	: 3.7
Mackay	: 4.1
Whitsundays	: 4.3
Townsville	: 4.0
TNQ	: 5.3
QLD Total	: 4.2

¹²Source: Tourism and Events Queensland (2013)

¹⁰Tourism Research Australia (2014). Travel by Australians. March 2013 Quarterly Results of the National Visitor Survey. Tourism Research Australia. Available online:

http://www.tra.gov.au/documents/nvs/Travel_by_Australians_June_2014_results_of_the_National_Visitor_Survey.html

¹²Tourism and Events Queensland (2014). Domestic Tourism Snapshot, Year Ended June 2014, Domestic Visitors to Queensland.

Available online: <http://teq.queensland.com/~media/3CDB8B4E1C2747D58B498220C27DAD2A.ashx>

SELTMP 2014: 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 – (954,000; 5,391,000; 5.7)
Visit friends/relatives – (397,000; 1,924,000; 4.9)
Business – (253,000; 997,000; 3.9)
Total – (1,664,000; 8,677,000; 5.3)

⁵Source: Tourism and Events Queensland (2014)

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

Holiday – (323,000; 1,317,000; 4.1)
Visit friends/relatives – (354,000; 1,547,000; 4.4)
Business – (184,000; 556,000; 3.0)
Total – (933,000; 3,731,000; 4.0)

⁶Source: Tourism and Events Queensland (2014)

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

Holiday – (304,000; 1,436,000; 4.7)
Visit friends/relatives – (120,000; 449,000; 3.8)
Business – (n/p, n/p, n/p)
Total – (497,000; 2,132,000; 4.3)

⁷Source: Tourism and Events Queensland (2014)

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

Holiday – (137,000; 401,000; 2.9)
Visit friends/relatives – (200,000; 1,041,000; 5.2)
Business – (292,000; 1,180,000; 4.0)
Total – (649,000; 2,688,000; 4.1)

⁸Source: Tourism and Events Queensland (2014)

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

Holiday (501,000; 1,747,000; 3.5)
Visit friends/relatives – (549,000; 2,008,000; 3.7)
Business – (443,000; 1,646,000; 3.7)
Total (1,585,000; 5,896,000; 3.7)

⁹Source: Tourism and Events Queensland (2014)

⁵Tourism and Events Queensland (2014). Tropical North Qld Regional Snapshot, Year Ended March 2014. Available online: <http://teq.queensland.com/~media/68F04DD61B8A4CB5888F883C1C5DE9C5.ashx>

⁶Tourism and Events Queensland (2014). Townsville Regional Snapshot, Year Ended March 2014. Available online: <http://teq.queensland.com/~media/0FFE528CCFE7482E980D5DE8FD65D7E4.ashx>

⁷Tourism and Events Queensland (2014). Whitsundays Regional Snapshot, Year Ended March 2014. Available online: <http://teq.queensland.com/~media/40DD334DA6B249CD9628D615C6986FDC.ashx>

⁸Tourism and Events Queensland (2014). Mackay Regional Snapshot, Year Ended March 2014. Available online: <http://teq.queensland.com/~media/C62E760F7AB5405992E7BAFDC122C862.ashx>

⁹Tourism and Events Queensland (2014). Southern GBR Regional Snapshot, Year Ended March 2014. Available online: <http://teq.queensland.com/~media/1F959C5F633342FAAA6FB7F40FA3F39F.ashx>

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Cruise shipping visitation



Image by Matt Curnock

SELTMP 2014: 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 –	42
Total pax capacity –	54,063
Total crew capacity –	22,997
Ports visited –	31
Pax days at port –	1,463,013
Total pax expend. –	\$443.1m
Total crew expend. –	\$60.3m

¹³Source: Cruise Down Under(2014)

State comparison cruise ship visitation (2012-13)

Passenger days at port :

NSW –	627,874
QLD –	292,284
VIC –	95,052
WA –	158,691
TAS –	65,852
NT –	42,436
SA –	23,165

¹³Source: Cruise Down Under(2014)

QLD ports cruise ship visitation (2012-13)

Visit days:

Brisbane–	101
Mackay/Whit. –	47
Cairns/Yorkeys –	47
Port Douglas –	25
Townsville –	10
Thursday Is. –	8
Cooktown –	1

¹³Source: Cruise Down Under(2014)

QLD ports cruise ship visitation (2012-13)

Passenger days at port :

Brisbane–	292,284
Mackay/Whit. –	74,786
Cairns/Yorkeys –	48,188
Port Douglas –	31,869
Townsville –	3,555
Thursday Is. –	1,475
Cooktown –	97

¹³Source: Cruise Down Under(2014)

QLD ports cruise ship visitation (2012-13)

Passenger expenditure:

Brisbane–	\$101.6m
Mackay/Whit. –	\$12.4m
Cairns/Yorkeys –	\$9.6m
Port Douglas –	\$6.0m
Townsville –	\$0.7m
Thursday Is. –	\$0.3m
Cooktown –	\$0.02m

¹³Source: Cruise Down Under(2014)

QLD ports cruise ship visitation (2012-13)

Total expenditure:

Brisbane–	\$301.2m
Mackay/Whit. –	\$14.8m
Cairns/Yorkeys –	\$12.7m
Port Douglas –	\$6.1m
Townsville –	\$1.5m
Thursday Is. –	\$0.4m
Cooktown –	\$0.03m

¹³Source: Cruise Down Under(2014)

¹³Cruise Down Under (2014). Economic Impact Assessment of the Cruise Shipping Industry in Australia 2012-13. Available online:

http://www.cruisedownunder.com/sites/cruise/files/2013_cdu_annual_report.pdf

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

Accommodation in the GBR region

TNQ

Establishments – 173 (0.6%)
 Room nights available – 3,910,876 (-1.5%)
 Room nights occupied – 2,400,252 (2.8%)
 Room Occupancy – 61.4% (2.6%)
 Takings (combined revenue) - \$328m (9.6%)
 Average room rate - \$136.72 (6.6%)
 Yield (av takings per room night) - \$83.91 (11.3%)

¹⁴Source: Tourism and Events Queensland (2013)

Townsville

Establishments – 60 (0.0%)
 Room nights available – 1,125,193 (4.0%)
 Room nights occupied – 665,984 (-5.8%)
 Room Occupancy – 59.2% (-6.2%)
 Takings (combined revenue) - \$88m (-3.7%)
 Average room rate - \$132.84 (2.2%)
 Yield (av takings per room night) - \$78.62 (-7.5%)

¹⁴Source: Tourism and Events Queensland (2013)

Whitsundays

Establishments – 35 (0.0%)
 Room nights available – 984,451 (-2.9%)
 Room nights occupied – 540,290 (0.6%)
 Room Occupancy – 54.9% (1.9%)
 Takings (combined revenue) - \$128m (3.9%)
 Average room rate - \$236.27 (3.2%)
 Yield (av takings per room night) - \$129.67 (7.0%)

¹⁴Source: Tourism and Events Queensland (2013)

Mackay

Establishments – (53 0.0%)
 Room nights available – 692,255 (-7.5%)
 Room nights occupied – 473,463 (-19.7%)
 Room Occupancy – 68.4% (-10.3%)
 Takings (combined revenue) - \$74m (-21.2%)
 Average room rate - \$156.00 (-1.9%)
 Yield (av takings per room night) - 106.69 (-14.8%)

¹⁴Source: Tourism and Events Queensland (2013)

SGBR (Central QLD)

Establishments – 108 (3.8%)
 Room nights available – 1,503,060 (2.2%)
 Room nights occupied – 928,512 (-9.3%)
 Room Occupancy – 61.8% (-7.8%)
 Takings (combined revenue) - \$138m (-7.3%)
 Average room rate - \$148.96 (2.2%)
 Yield (av takings per room night) \$92.02 (-9.3%)

¹⁴Source: Tourism and Events Queensland (2013)

SGBR (Bundaberg)

Establishments – 33 (-5.7%)
 Room nights available – 314,270 – (0.4%)
 Room nights occupied – 205,255 (8.5%)
 Room Occupancy – 65.3% (5.4%)
 Takings (combined revenue) - \$25m (8.5%)
 Average room rate - \$119.79 (0.0%)
 Yield (av takings per room night) - \$78.24 (8.9%)

¹⁴Source: Tourism and Events Queensland (2013)

Queensland Total

Establishments – 1,137 (0.9%)
 Room nights available – 22,351,264 (0.2%)
 Room nights occupied – 14,492,700 (-0.9%)
 Room Occupancy – 64.8% (-0.7%)
 Takings - \$2,265m (1.6%)
 Average room rate - \$156.27 (2.6%)
 Yield (av takings per room night) - \$101.33 (1.5%)

¹⁴Source: Tourism and Events Queensland (2013)

Australia Total

Establishments – 4,237 (0.1%)
 Room nights available – 83,589,460 (0.6%)
 Room nights occupied – 54,334,100 (-0.1%)
 Room Occupancy – 65.0% (-0.5%)
 Takings - \$9,008m (2.5%)
 Average room rate - \$165.80 (2.6%)
 Yield (av takings per room night) - \$107.77 (1.9%)

¹⁴Source: Tourism and Events Queensland (2013)

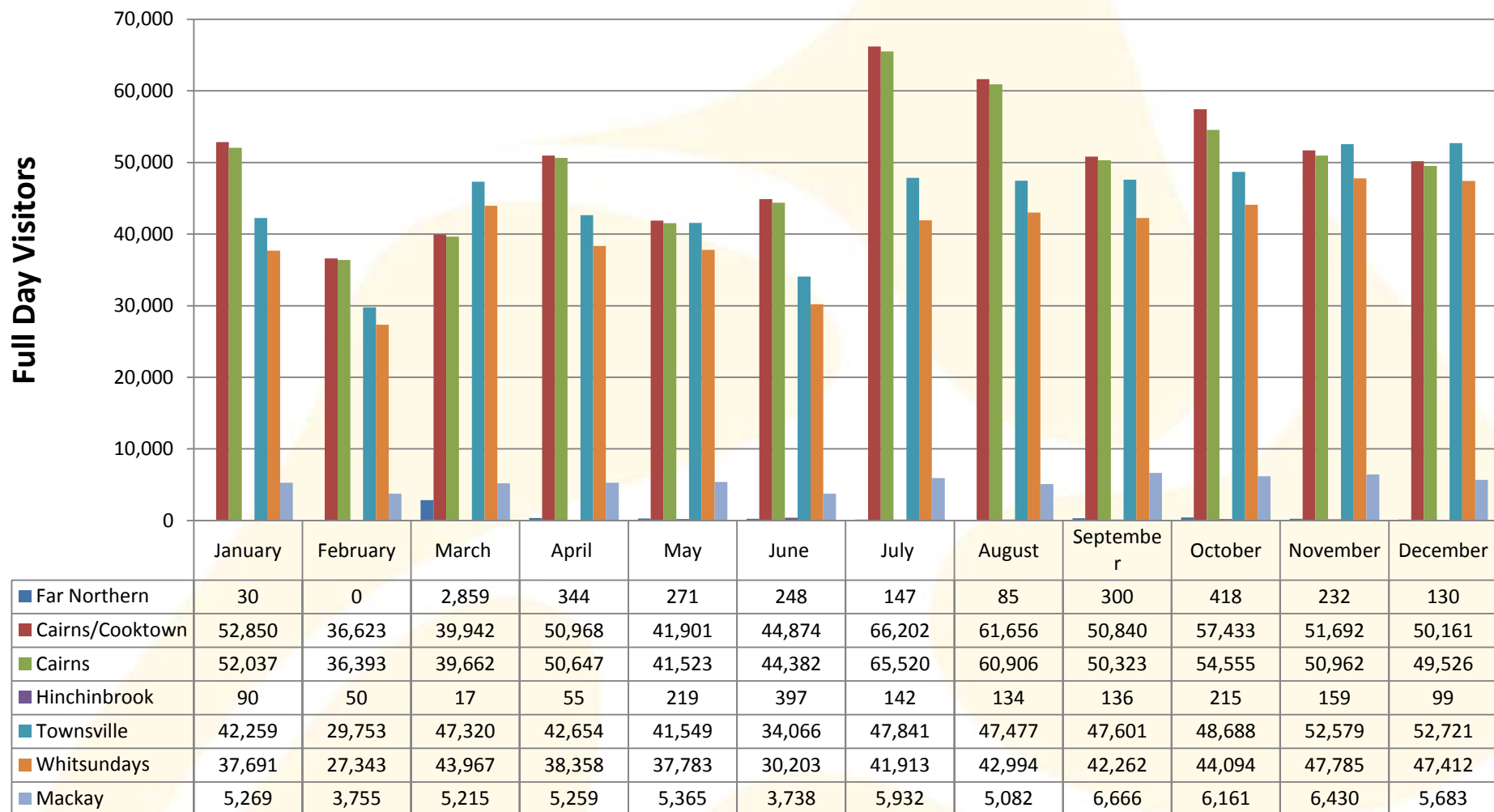
¹⁴Tourism and Events Queensland (2013). Tourist Accommodation Data Sheet. Year Ended June 2013. Available online: <http://www.teq.queensland.com/~media/1AF835A4F67242DEB36F9D0EBCC880E0.ashx>

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

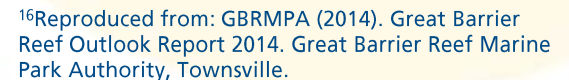
Seasonality of tourist GBR visitation

Full day visits to GBRMP Management Areas



¹⁵GBRMPA (2011). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville. Updated data for 2013-14 not yet available.

Spatial distribution of tourist activity in the GBRMP (2013)



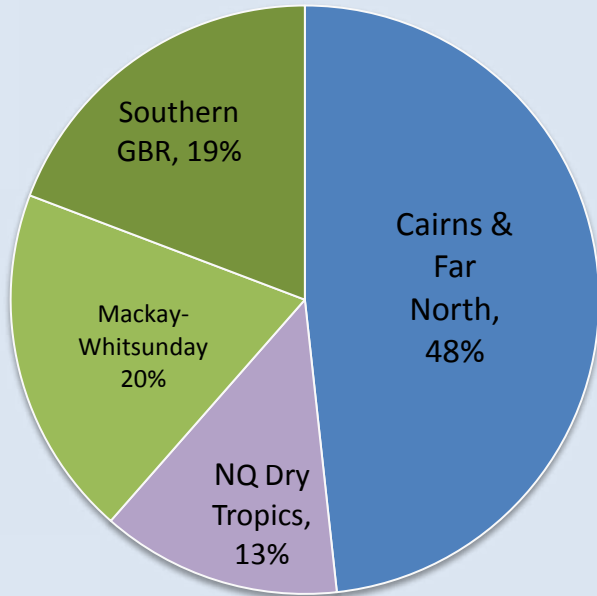
SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

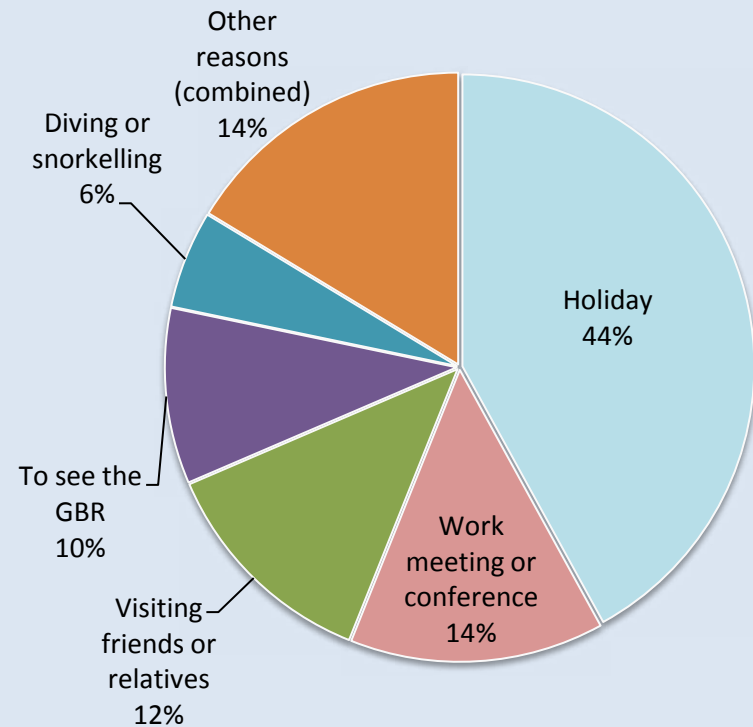
2013 GBR Tourist Survey Results

Sample description

GBR tourist sample size: broad sampling areas (n=2877)



Main reason for visiting the GBR region:



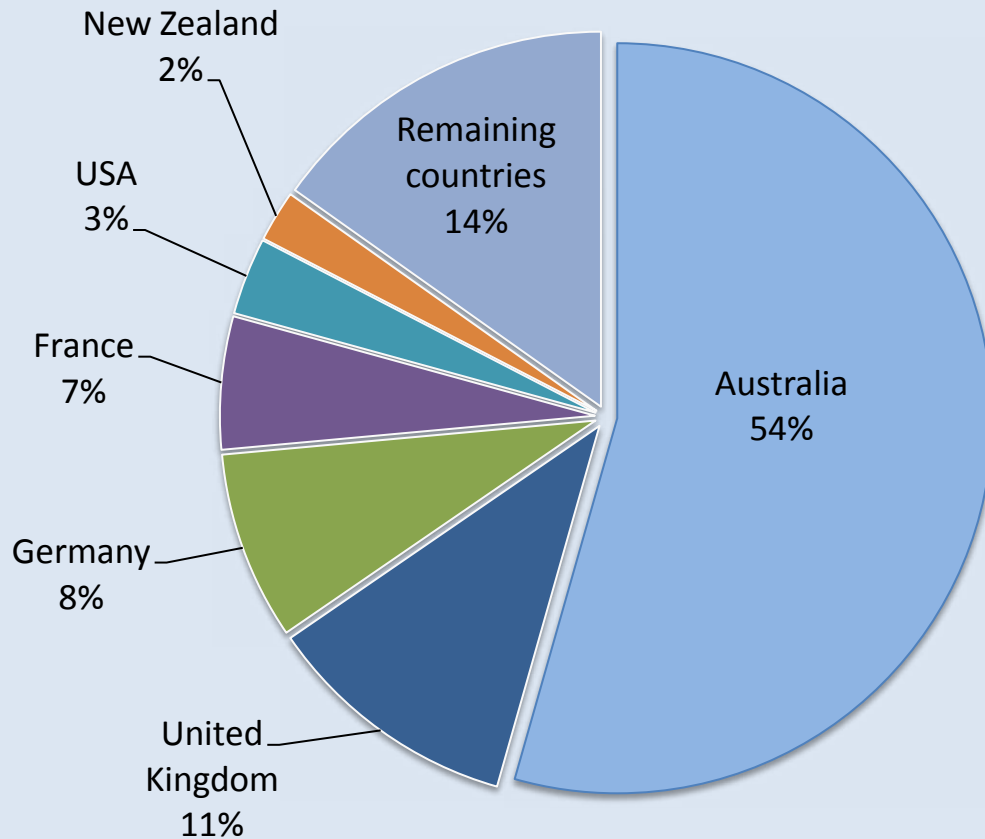
SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

2013 GBR Tourist Survey Results

Sample description*

Country of origin:



Sample summary (n=2877):

- Mean age = 40
- 50% female
- 54% Australian; remainder came from 53 countries
- Median 9 days duration of stay in region
- 70% had visited the GBR** during their visit
- 51% of those 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 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

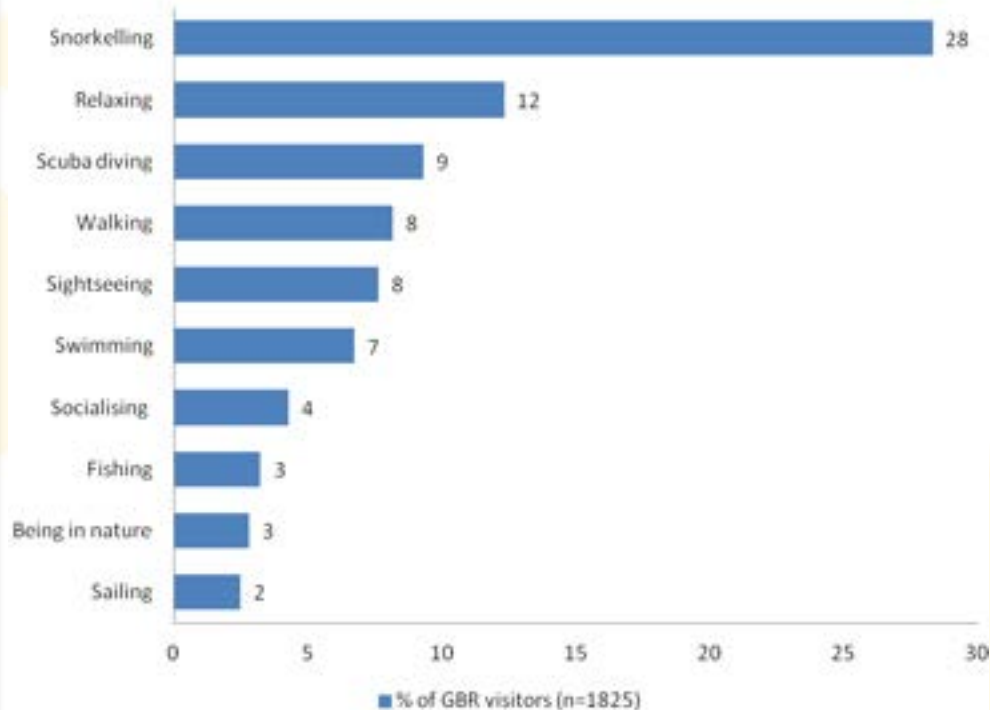
2013 GBR Tourist Survey Results

Patterns of use

Location most recently visited in the GBR:



Main activity during GBR visit (% of respondents):

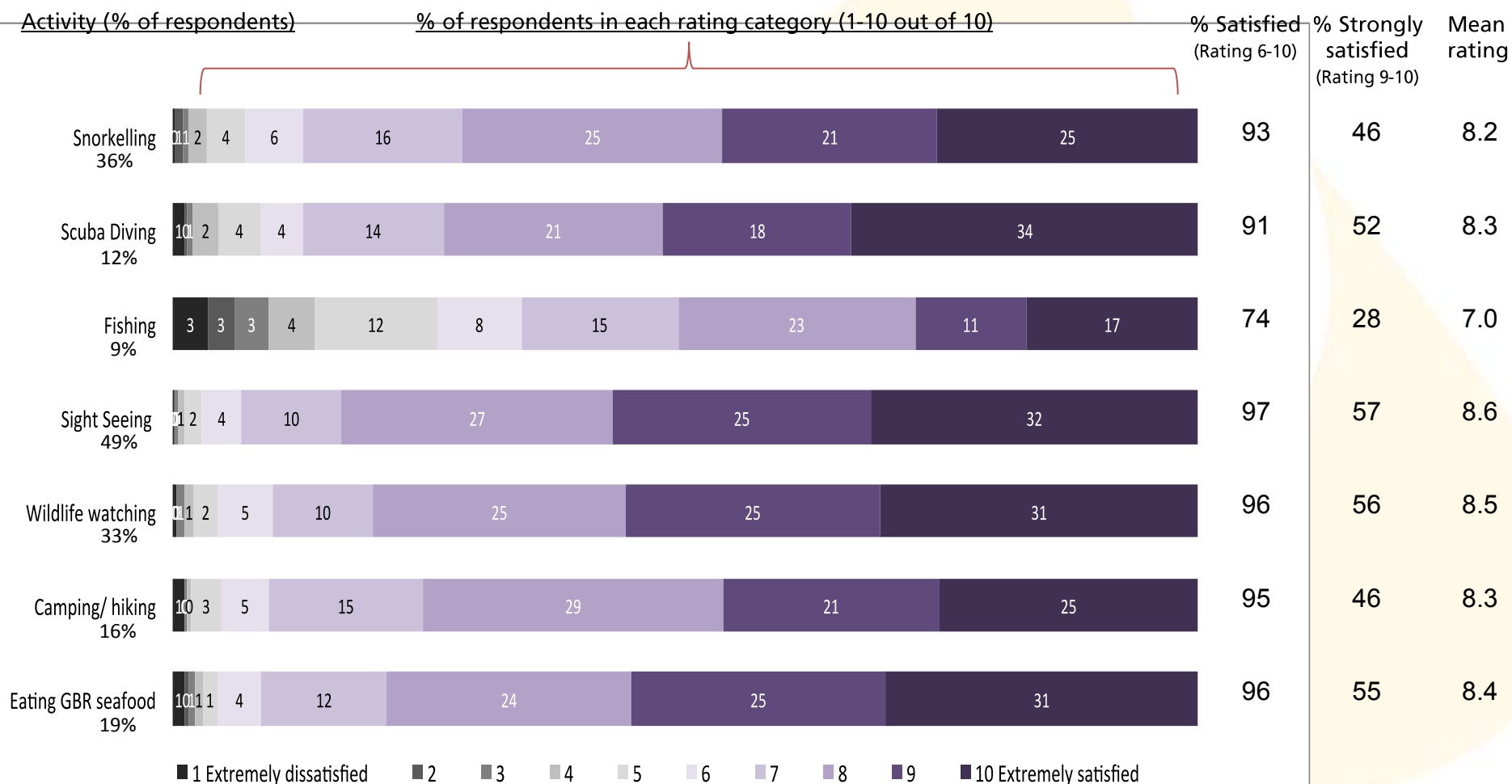


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (use and activities)

2013 GBR Tourist Survey Results

Patterns of use: activities and perceived quality



2013 GBR Tourist Survey Results

[illegible]

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

SELTMP 2014: 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)

"It means a lot to me that I have been to the GBR"



% Agree
(Rating 6-10)

% Strongly agree
(Rating 9-10)

Mean rating

92

54

8.4

"The GBR was an important part of my decision to visit this region"



71

42

7.0

"There are many other places that are better than the GBR for the recreation activities I enjoy"



42

8

5.1

"I feel proud that the GBR is a World Heritage Area"

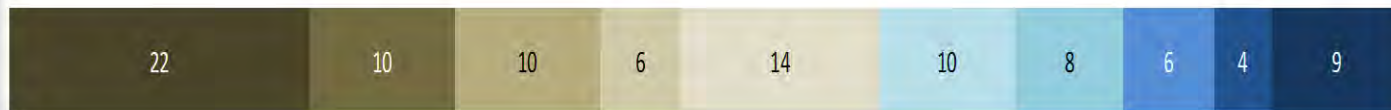


93

68

8.8

"The GBR is part of my identity"



37

13

4.6

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

SELTMP 2014: 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)

% Agree (Rating 6-10) % Strongly agree (Rating 9-10) Mean rating

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



97

71

8.4

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



89

46

7.0

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



91

54

5.1

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



83

47

8.8

"I value the GBR for the fresh seafood it provides"



60

26

4.6

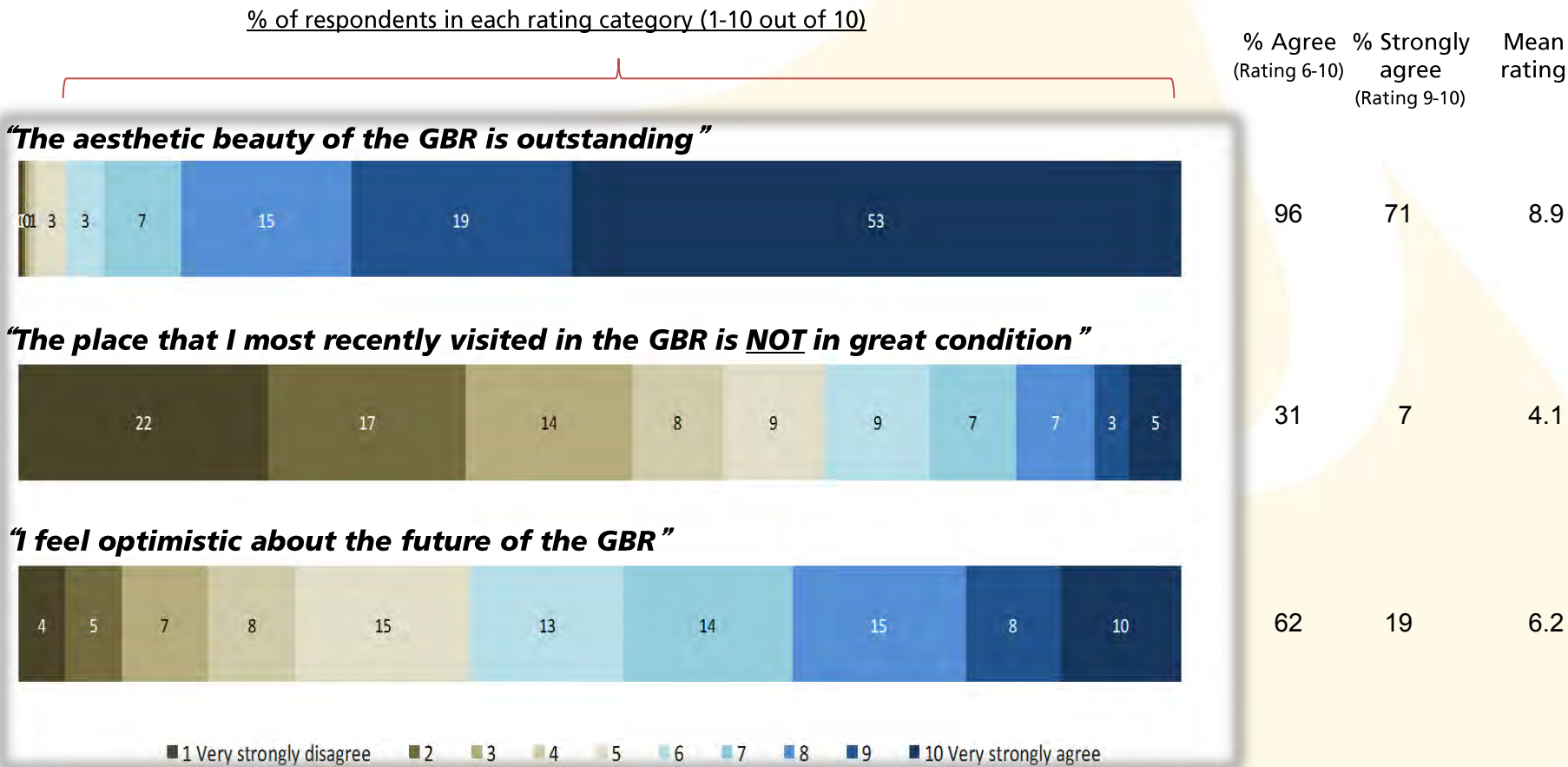
1 Very strongly disagree 2 3 4 5 6 7 8 9 10 Very strongly agree

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

GBR Perceptions



SELTMP 2014: 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)

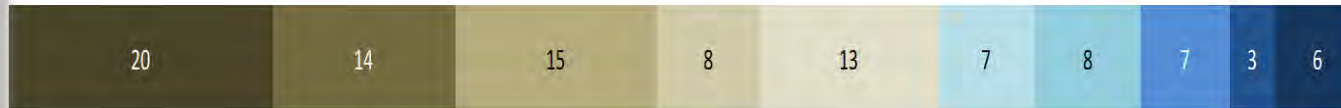
"I would like to do more to help protect the GBR"



% Agree (Rating 6-10) % Strongly agree (Rating 9-10) Mean rating

78 25 7.0

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



31 10 4.3

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



73 24 6.8

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



41 13 5.0

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



59 23 6.1

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

SELTMP 2014: 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)

% Agree (Rating 6-10)
 % Strongly agree (Rating 9-10)
 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

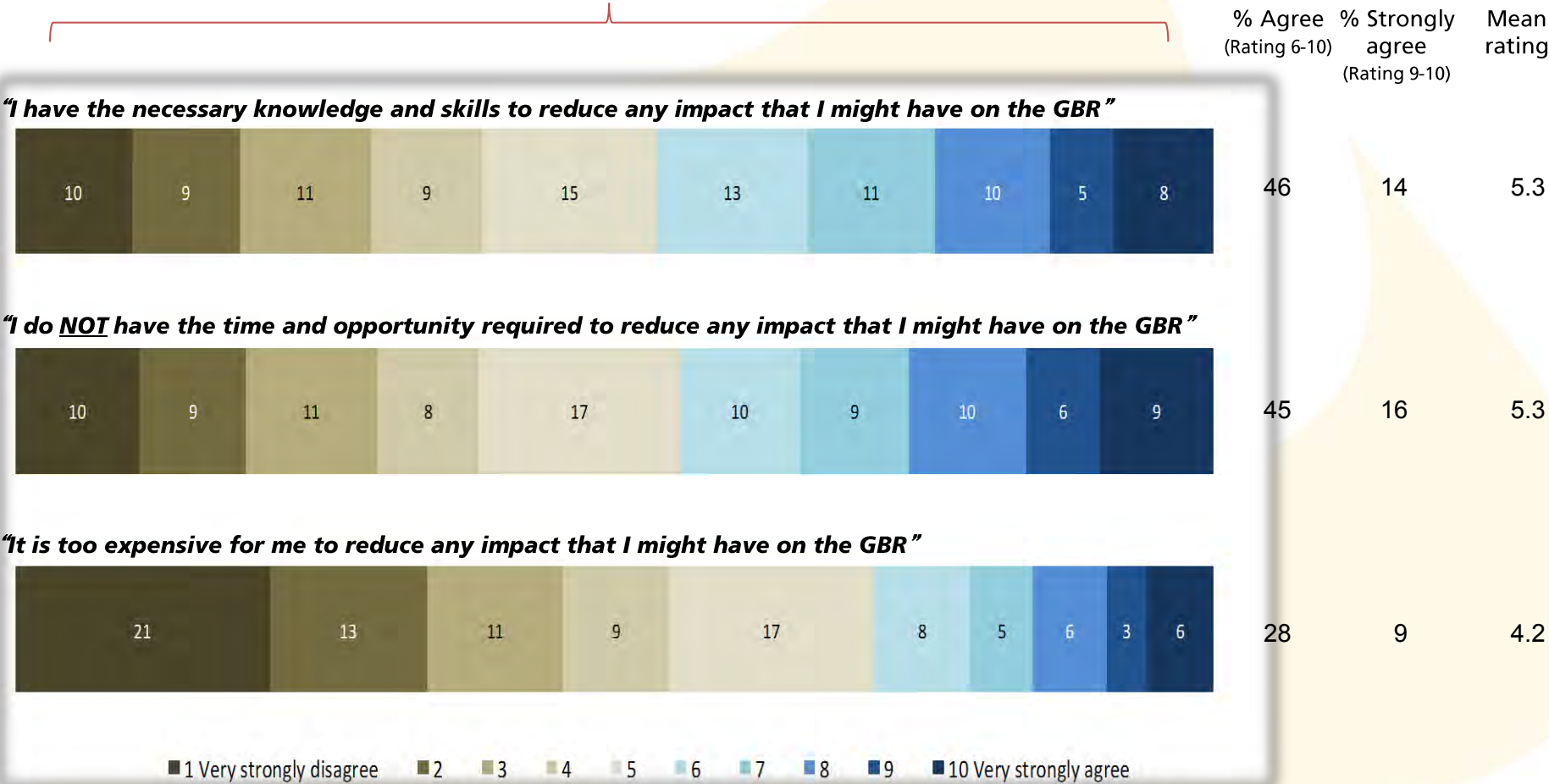
SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

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)

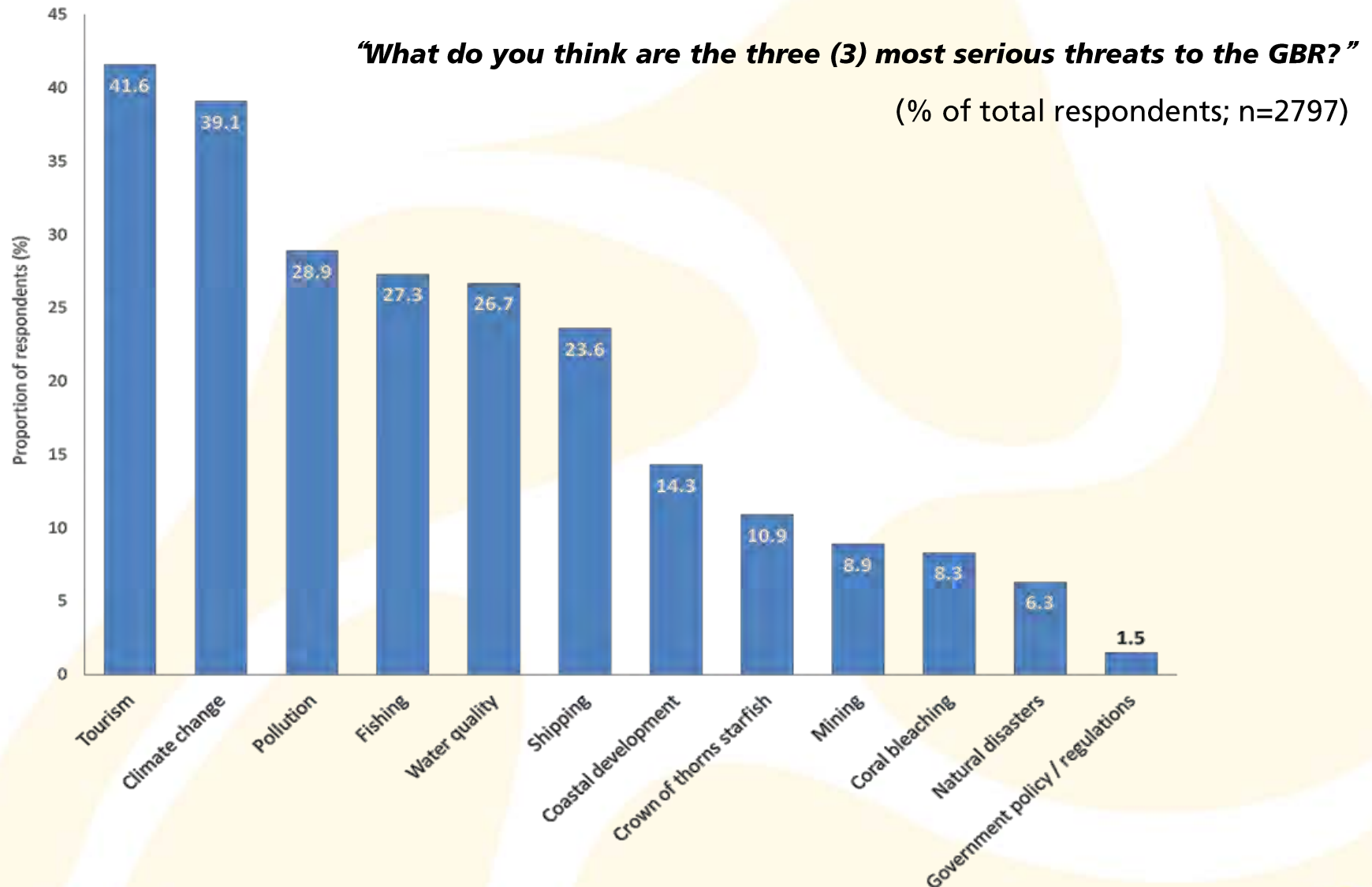


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

2013 GBR Tourist Survey Results

Perceived threats to the GBR



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART A: TOURISTS (social relationship)

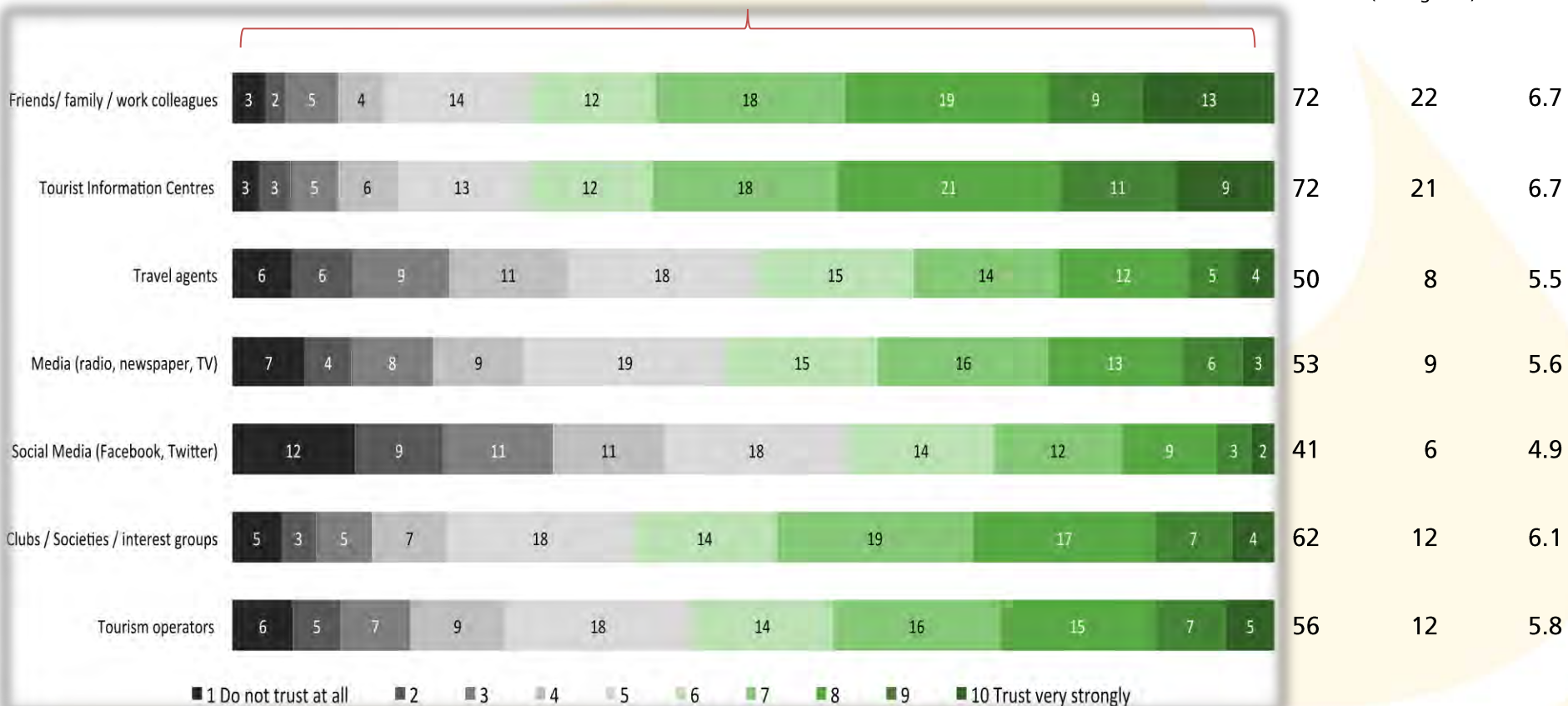
2013 GBR Tourist Survey Results

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)

% Trust (Rating 6-10)
% Strongly trust (Rating 9-10)
Mean rating



SELTMP 2014: 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

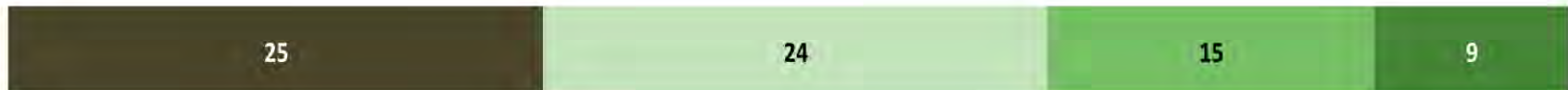
Recycle



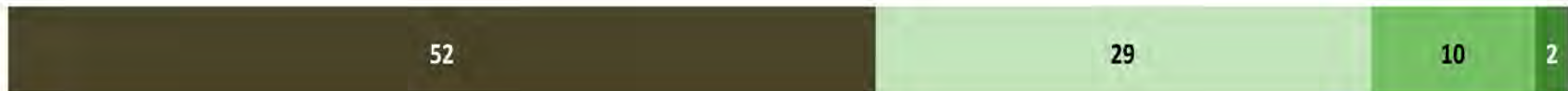
Prioritise environmentally friendly products when shopping



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

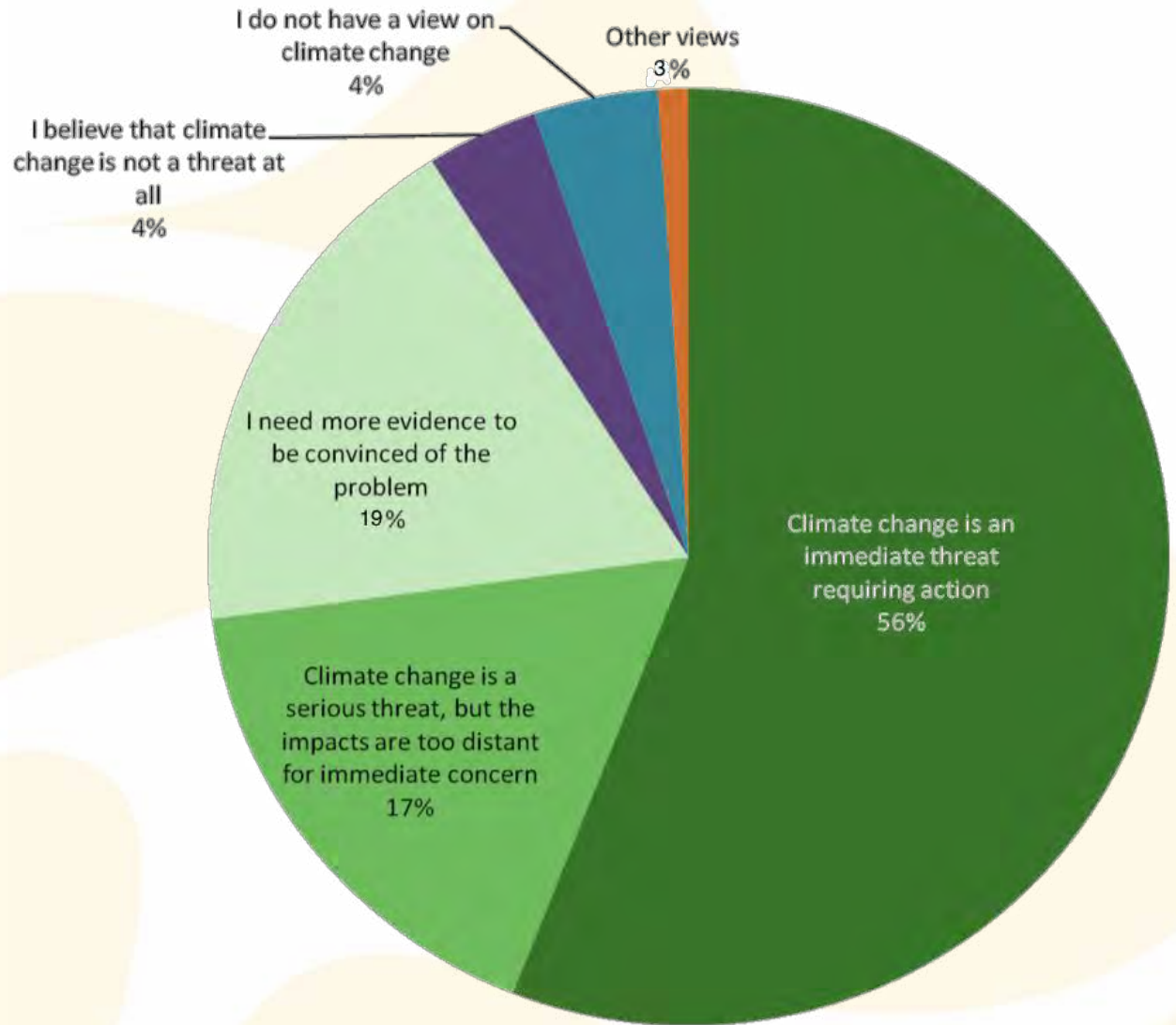
SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

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 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY



SELTMP 2014: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: GBRMPA (2013)

¹⁶GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2014: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: 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.*

¹⁶Source: GBRMPA (2013)

¹⁶GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

Tourism infrastructure in the GBRMP



¹⁶GBRMPA (2013). Unpublished data provided by GBRMPA Spatial and Information Technologies. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2014: 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 2014: 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.

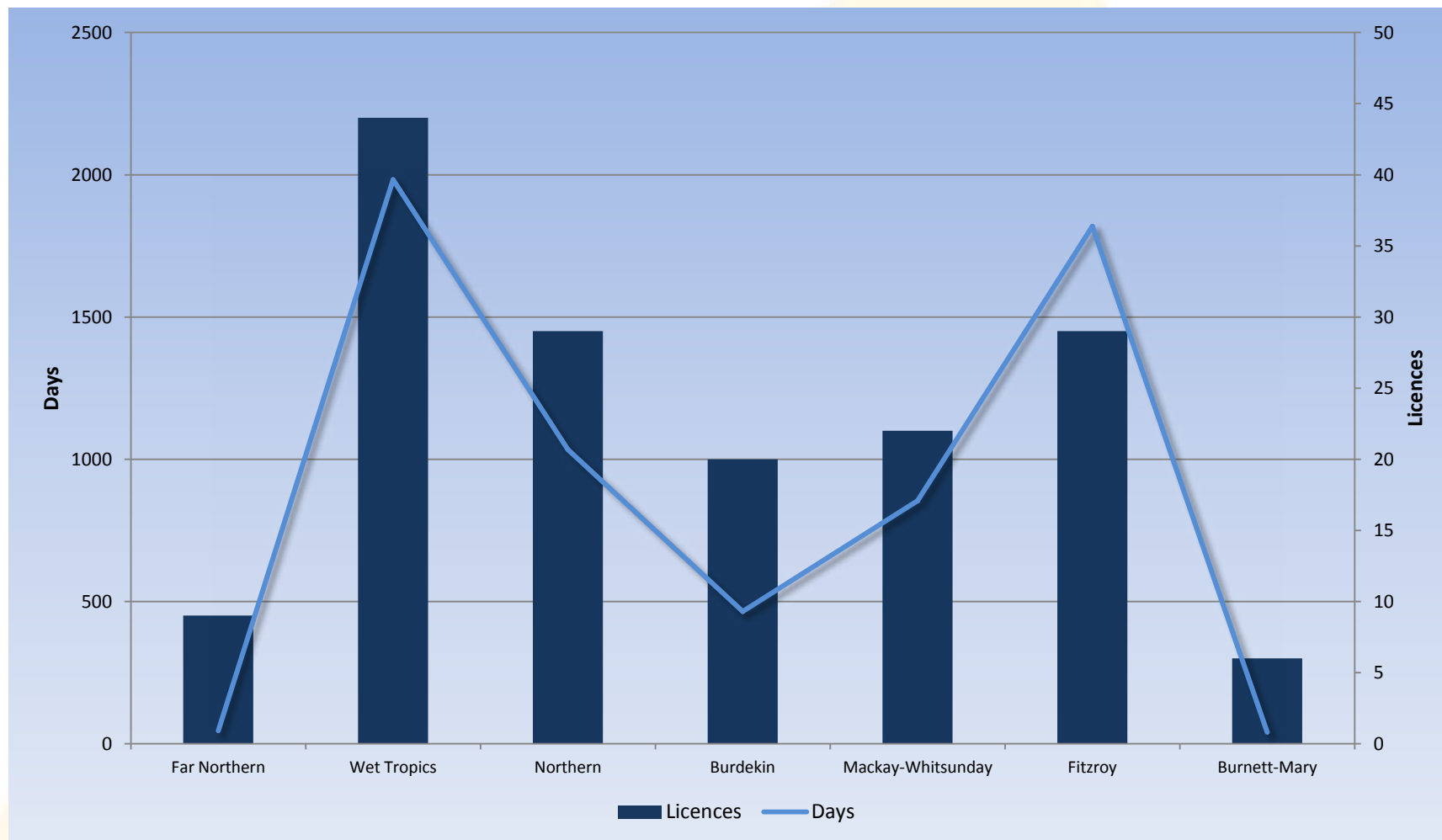
Information obtained via systematic web search, April 2013.

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR charter fishing

Charter fishing licenses and fishing days by region



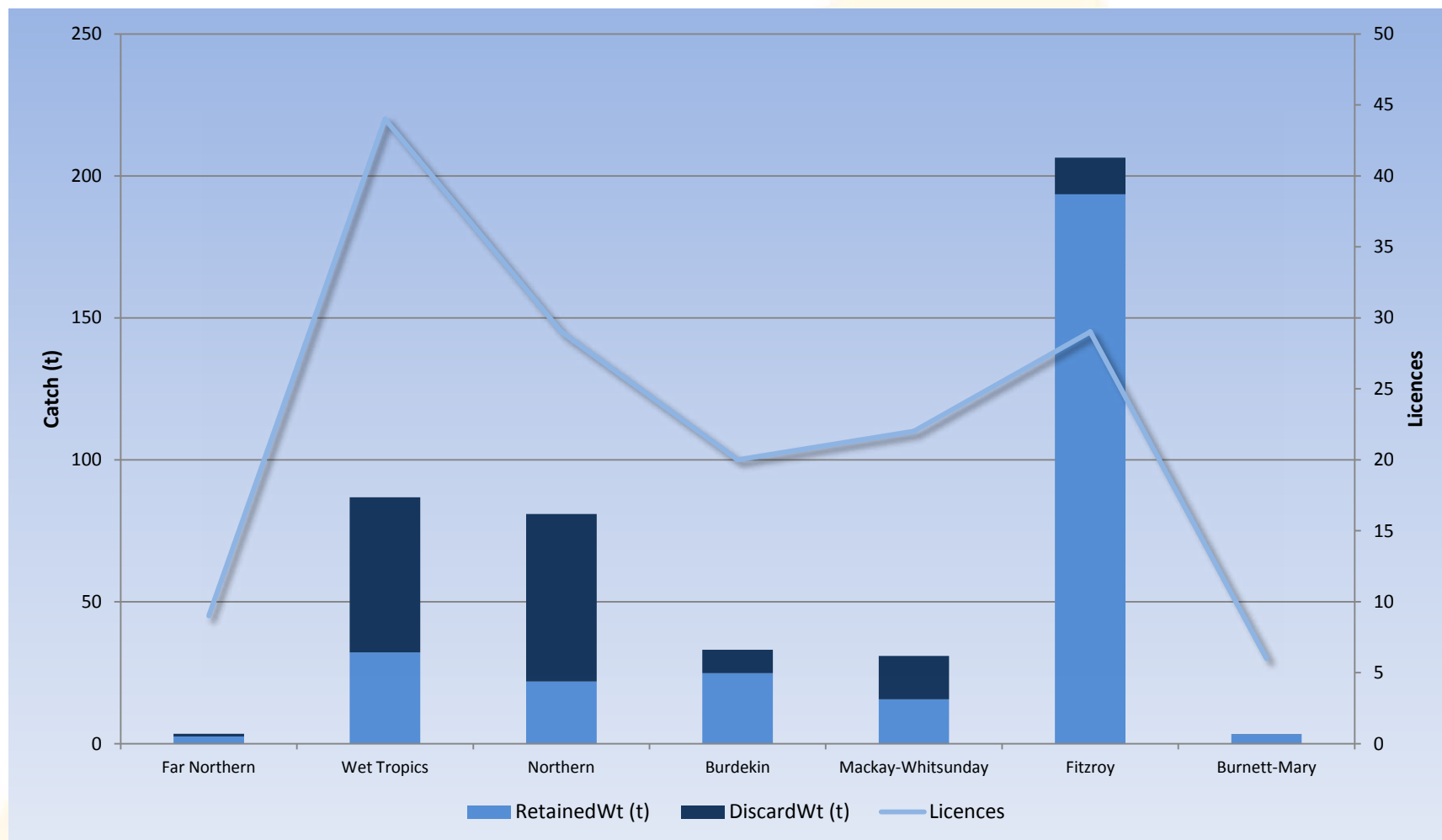
¹⁷DAFF (2013). Unpublished data provided by Department of Agriculture, Fisheries and Forestry

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR charter fishing

Charter fishing licenses and catch (retained and discarded) by region



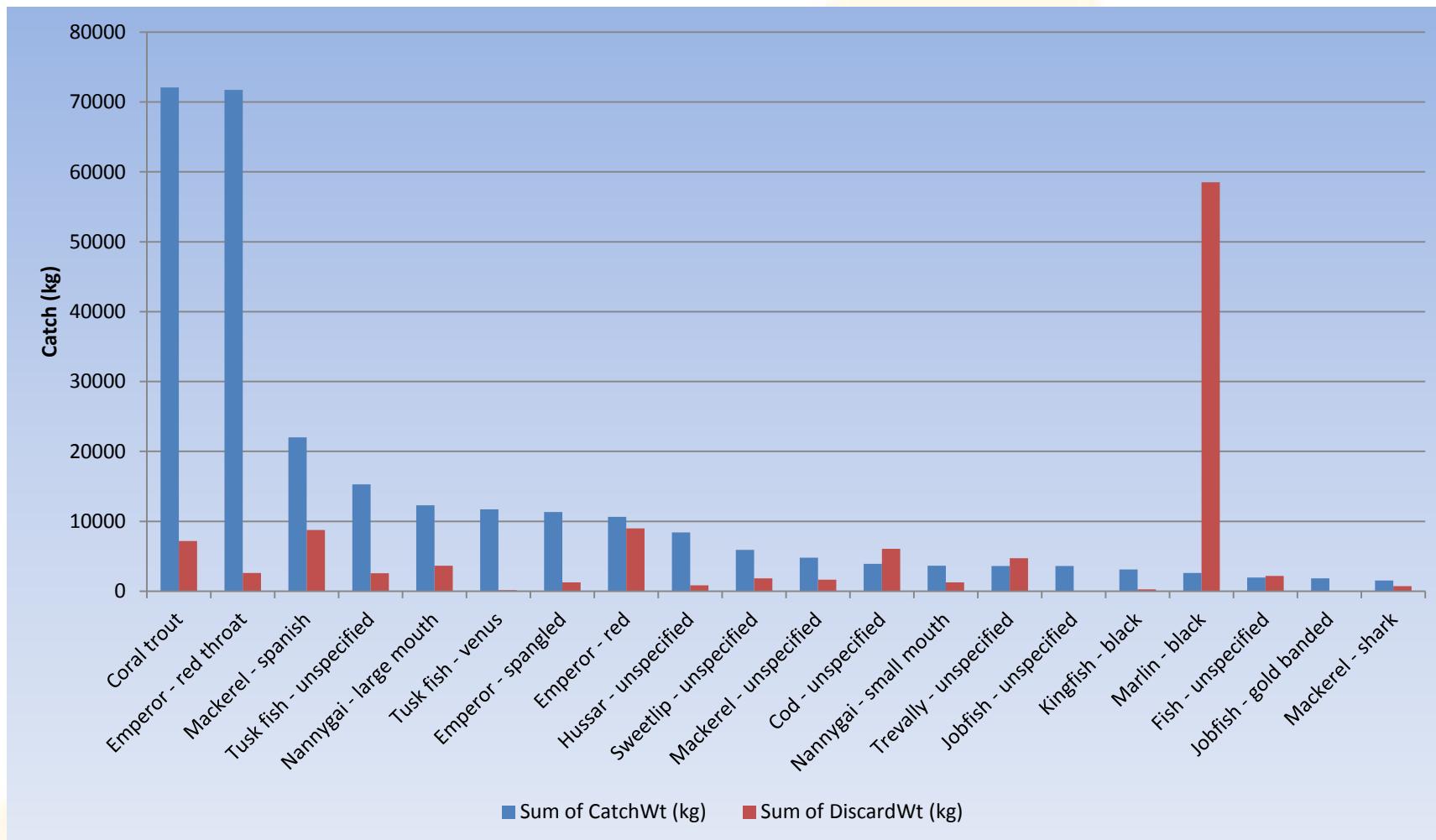
¹⁷DAFF (2013). Unpublished data provided by Department of Agriculture, Fisheries and Forestry

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR charter fishing

Charter fishing catch (retained and discarded) GBR wide – top 20 species



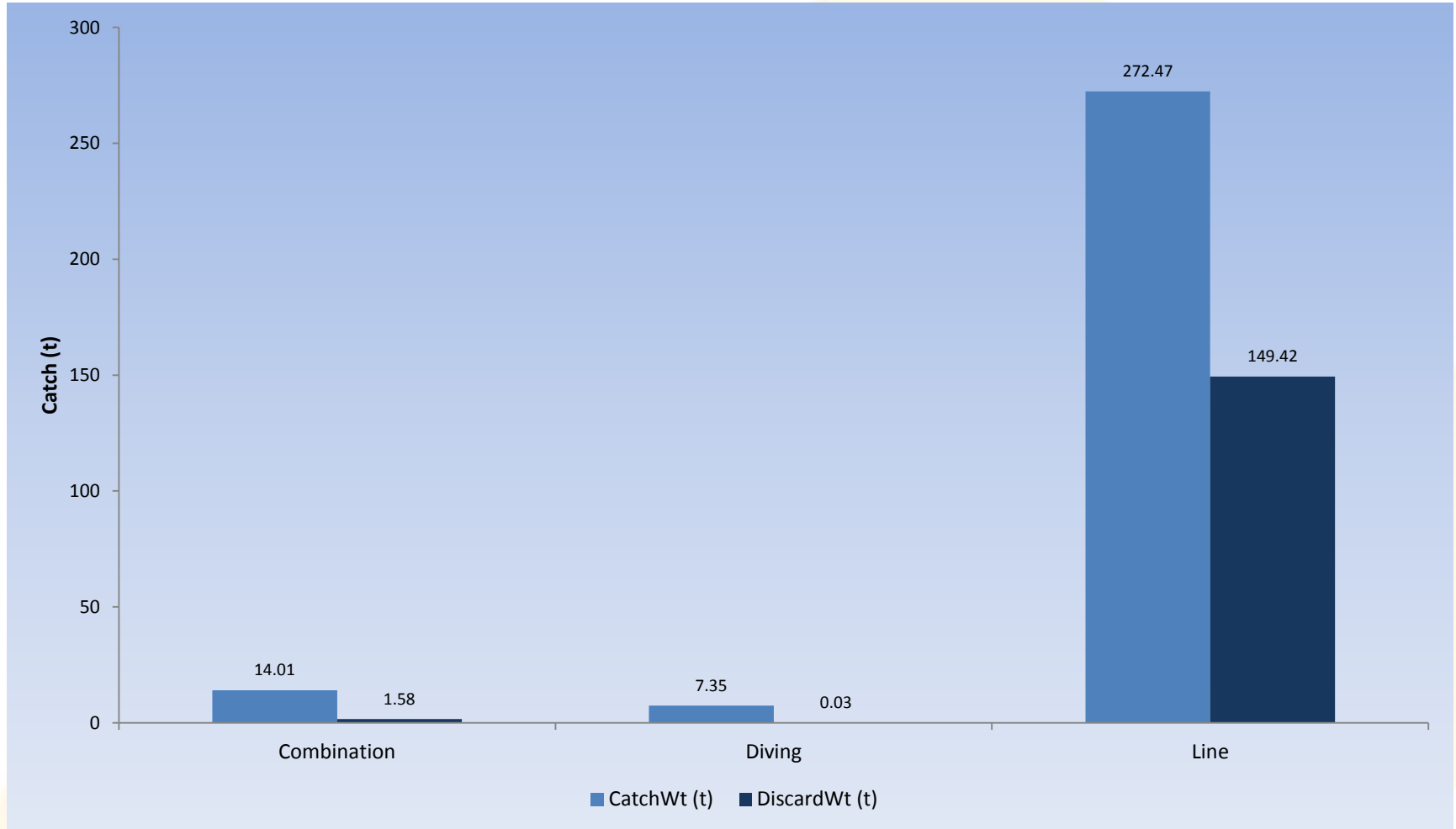
¹⁷DAFF (2013). Unpublished data provided by Department of Agriculture, Fisheries and Forestry

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR charter fishing

Charter fishing catch by method



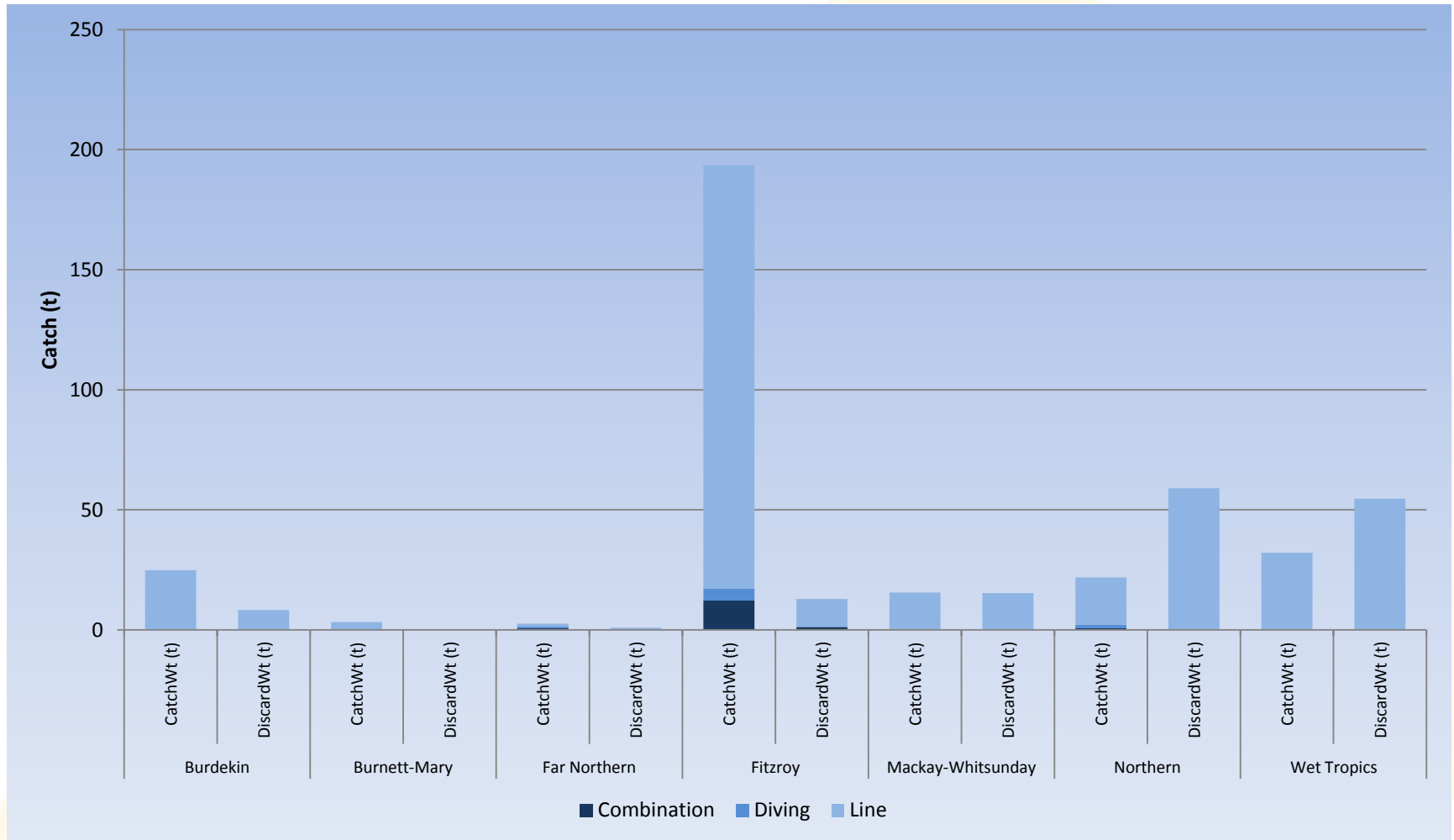
¹⁷DAFF (2013). Unpublished data provided by Department of Agriculture, Fisheries and Forestry

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (use and activities)

GBR charter fishing

Charter fishing catch by method and region



Information obtained via systematic web search, April 2013.

SELTMP 2014: 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
<u>TOTAL</u>	: 119

Respondent role(s)

Owner + manager	: 77
Manager	: 39
Other senior role	: 3
<u>TOTAL</u>	: 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

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

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



Beautiful	16%
Tourism	10%
Fish	9%
Diving	9%
Coral	8%
Fishing	8%
Diversity	8%
Reef	6%
Wonder of the world	6%
Pristine	4%

8% mentioned 'negative' words. These included rules, politics, bureaucratic; threatened, declining, pollution

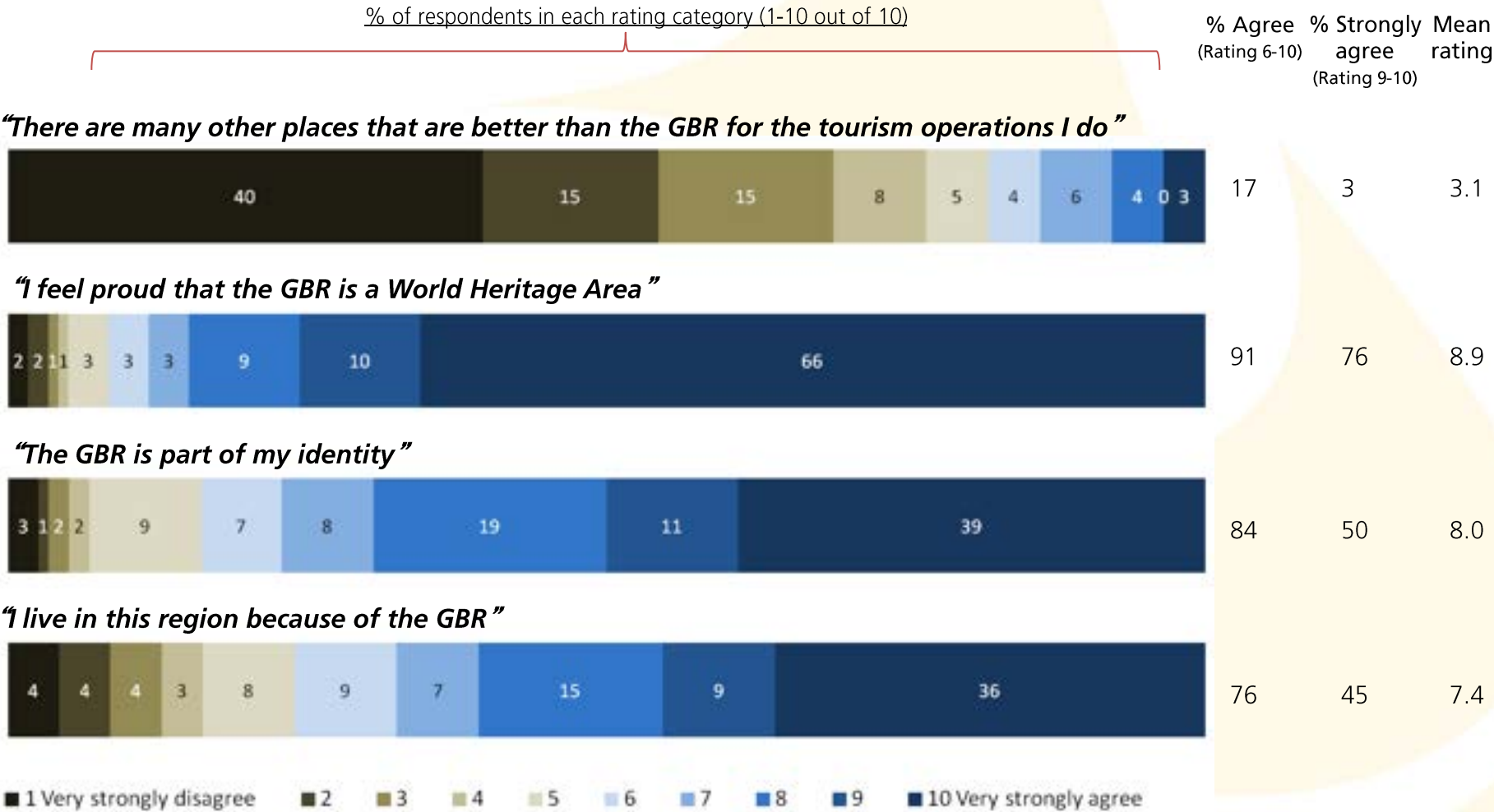
Coding of open-ended responses:
 # of tourist operators surveyed = 119
 Total # of words/phrases listed = 268
 Total # of distinct words/phrases = 124

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR relationship



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

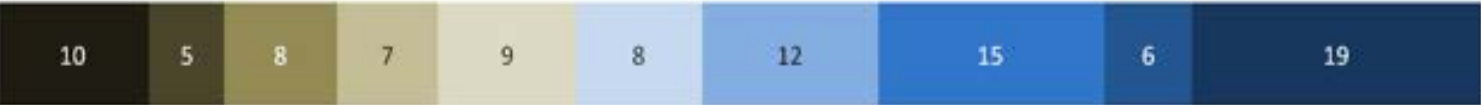
PART B: TOURISM INDUSTRY (social relationship)

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”



% Agree
(Rating 6-10)

% Strongly agree
(Rating 9-10)

Mean rating

60

25

6.2

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



88

49

8.1

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

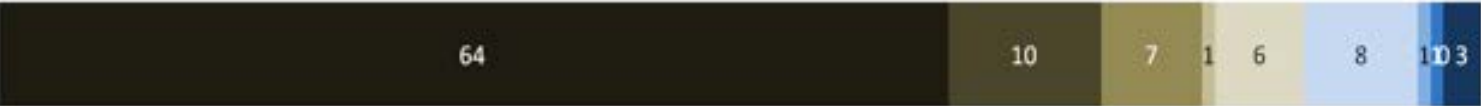


73

57

8.0

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



13

3

2.2

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



19

2

2.9

1

2

3

4

5

6

7

8

9

10

Very strongly disagree

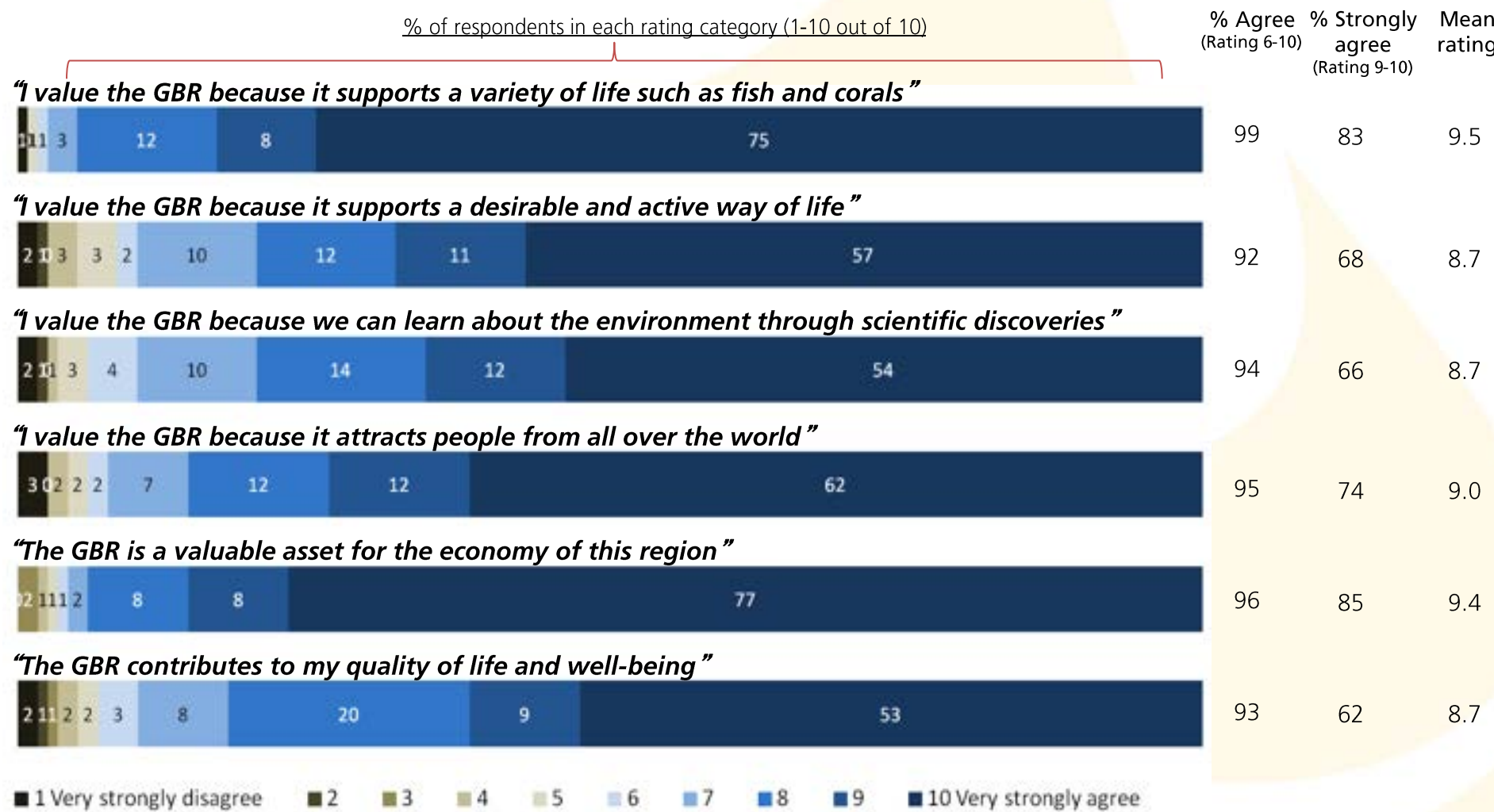
Very strongly agree

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Values associated with the GBR

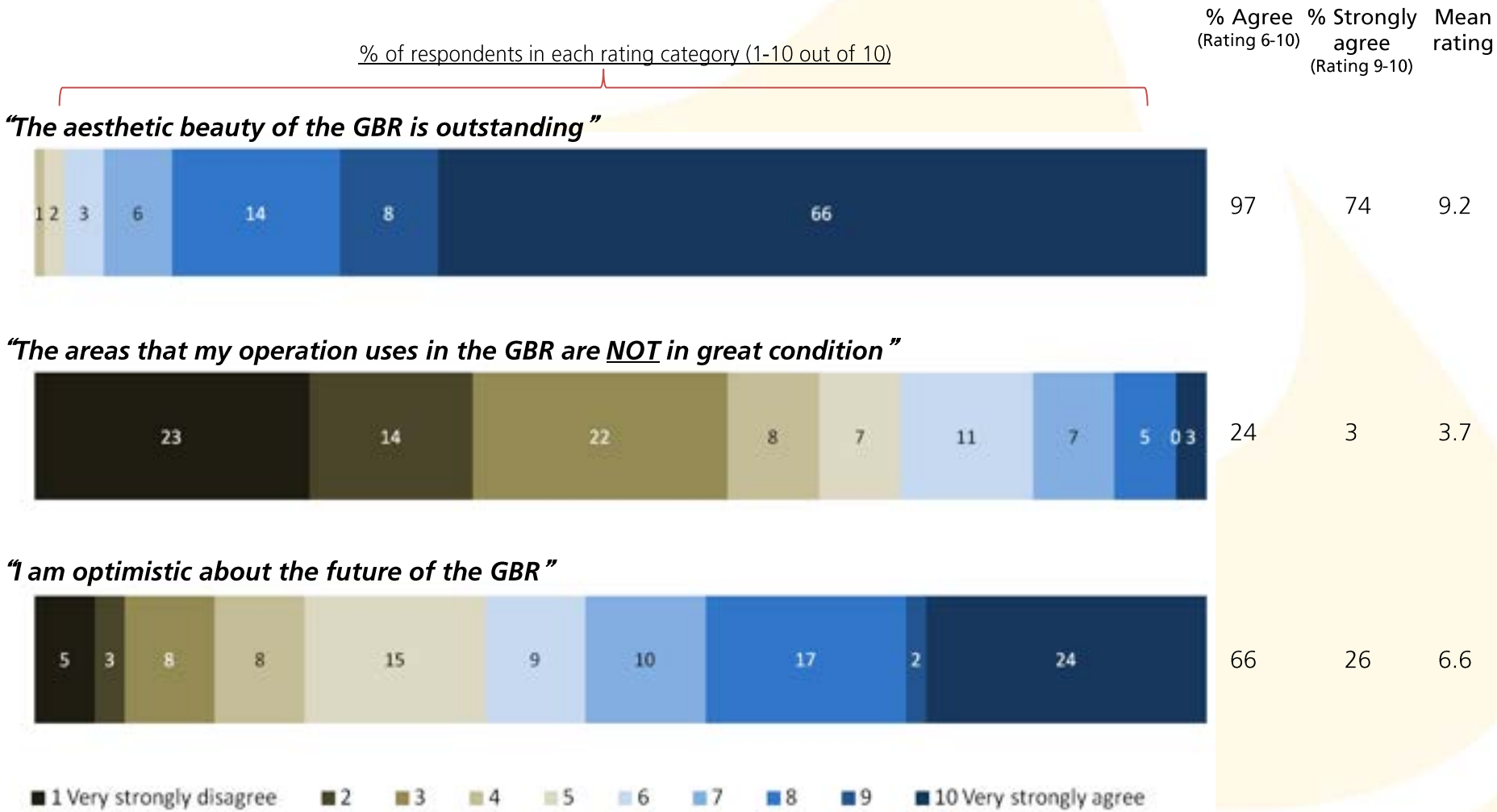


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

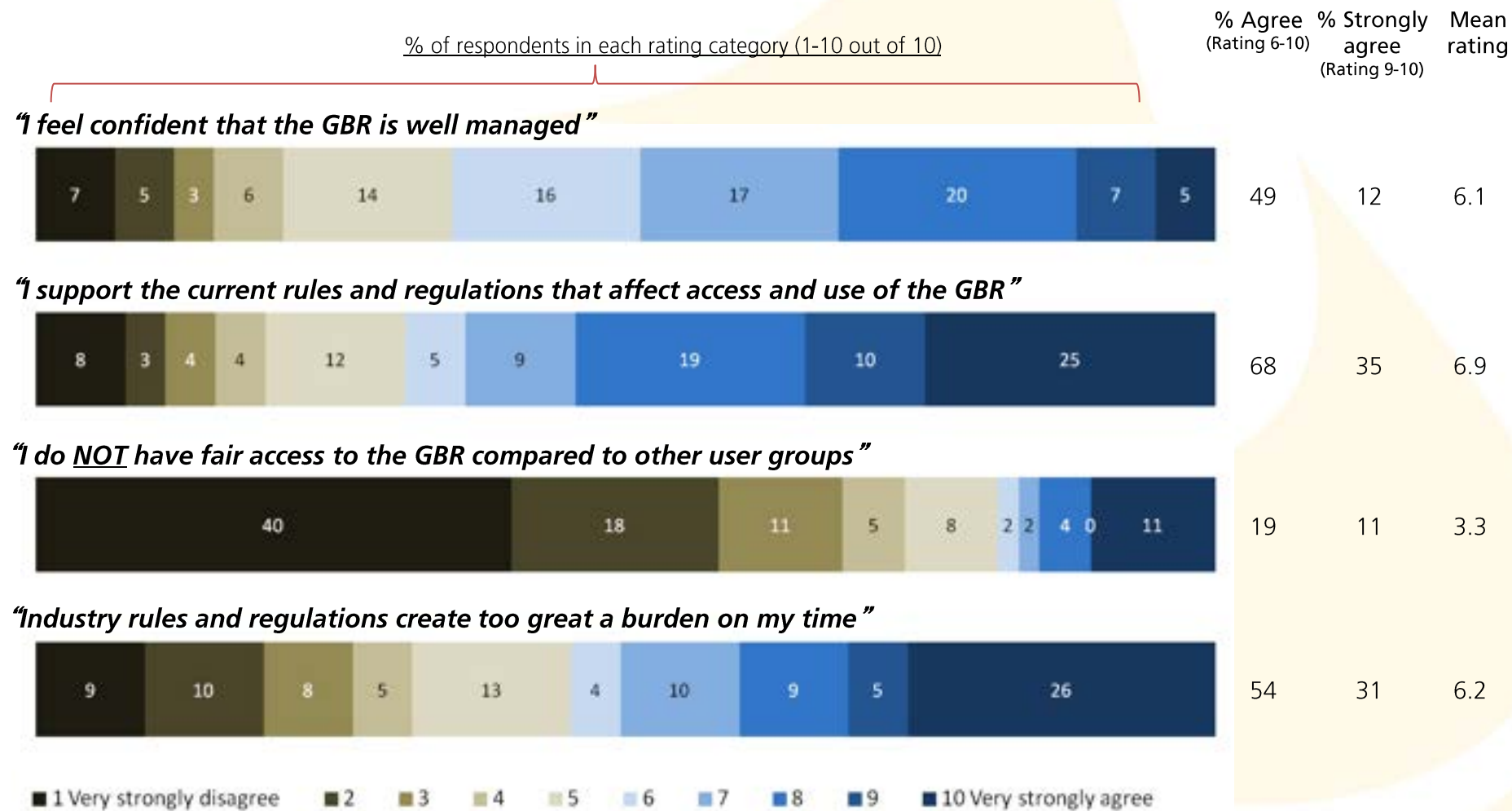
GBR Tourism Operator Survey Results

GBR perceptions



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF
PART B: TOURISM INDUSTRY (social relationship)
GBR Tourism Operator Survey Results

Management perceptions

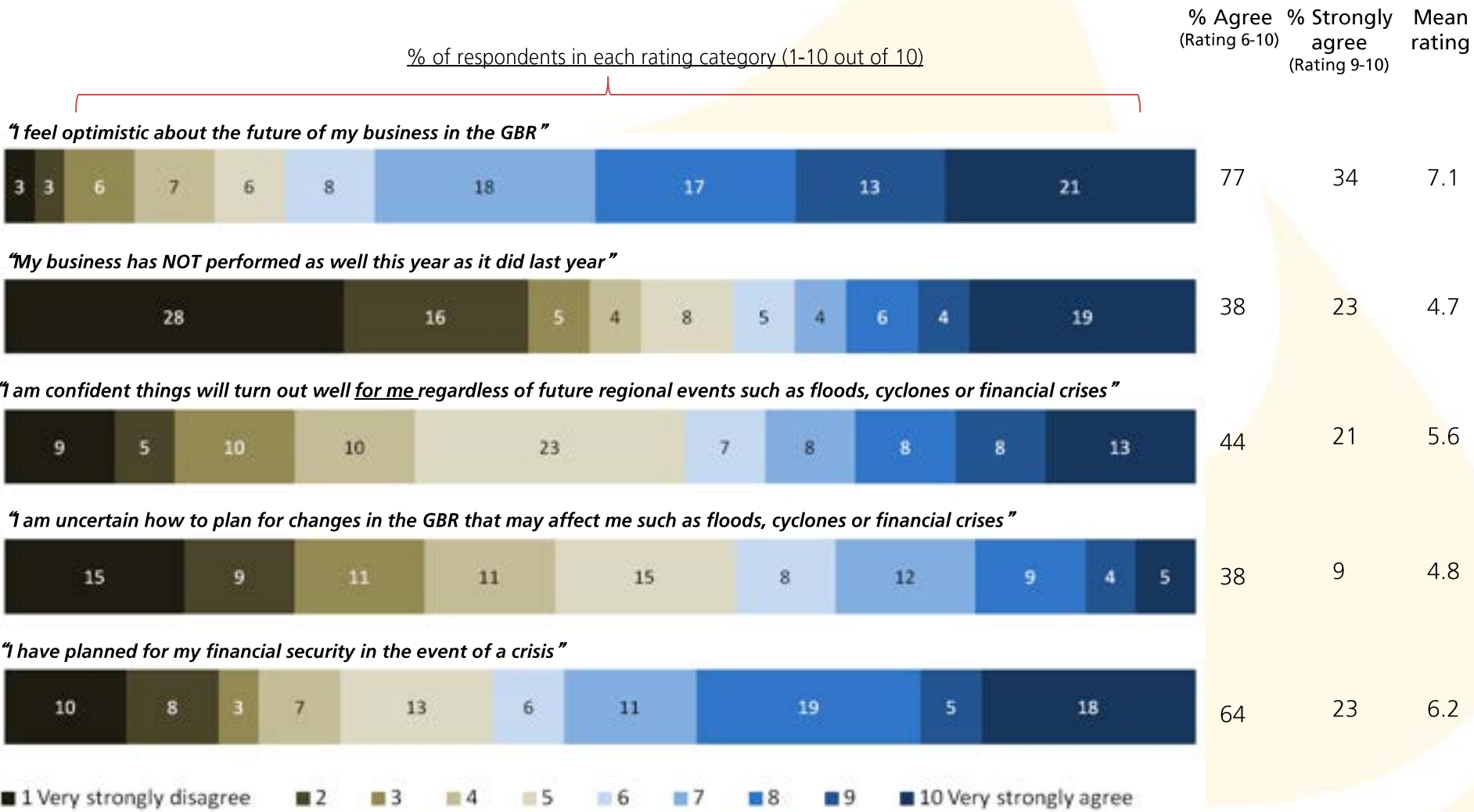


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Resilience

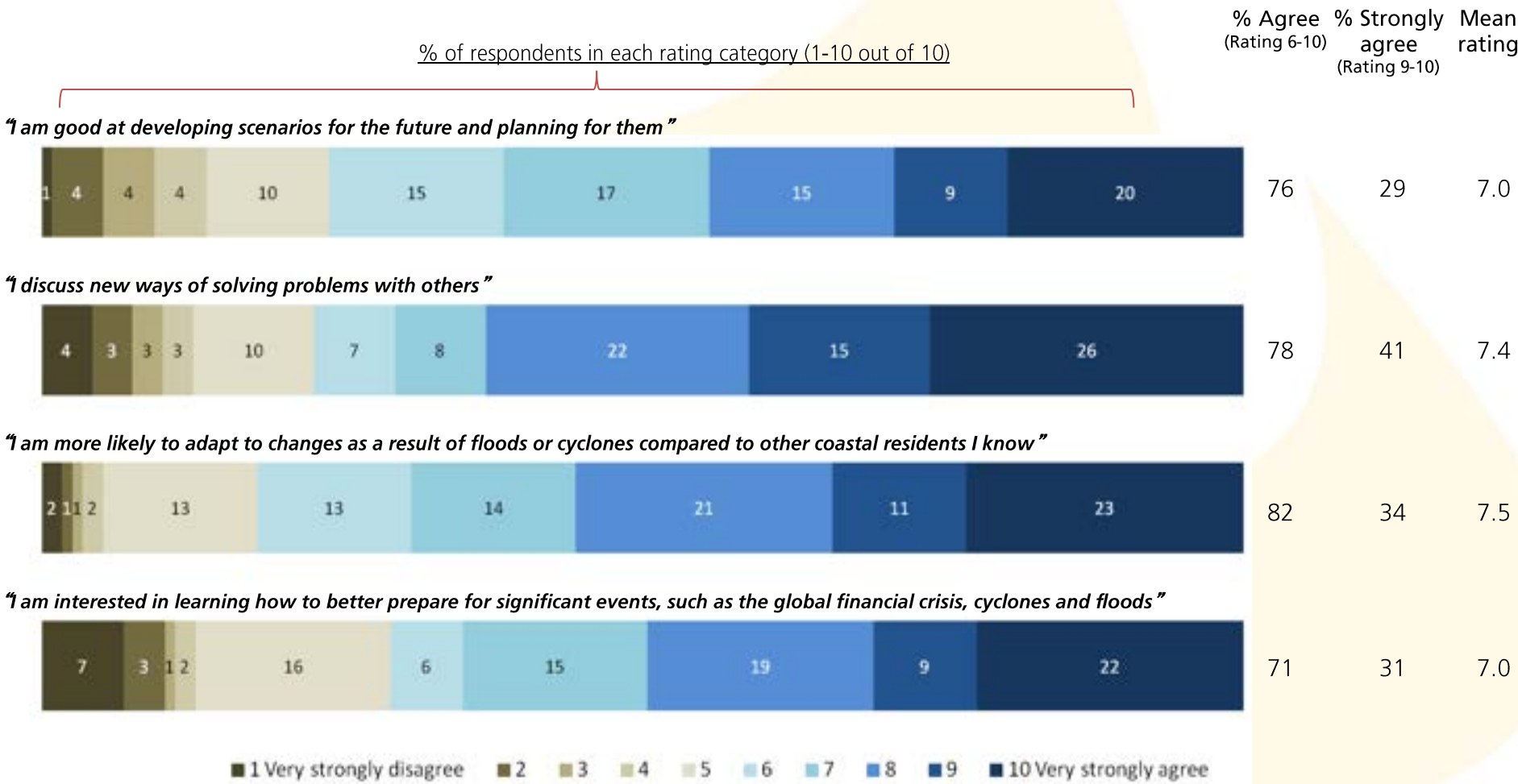


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Adaptive capacity

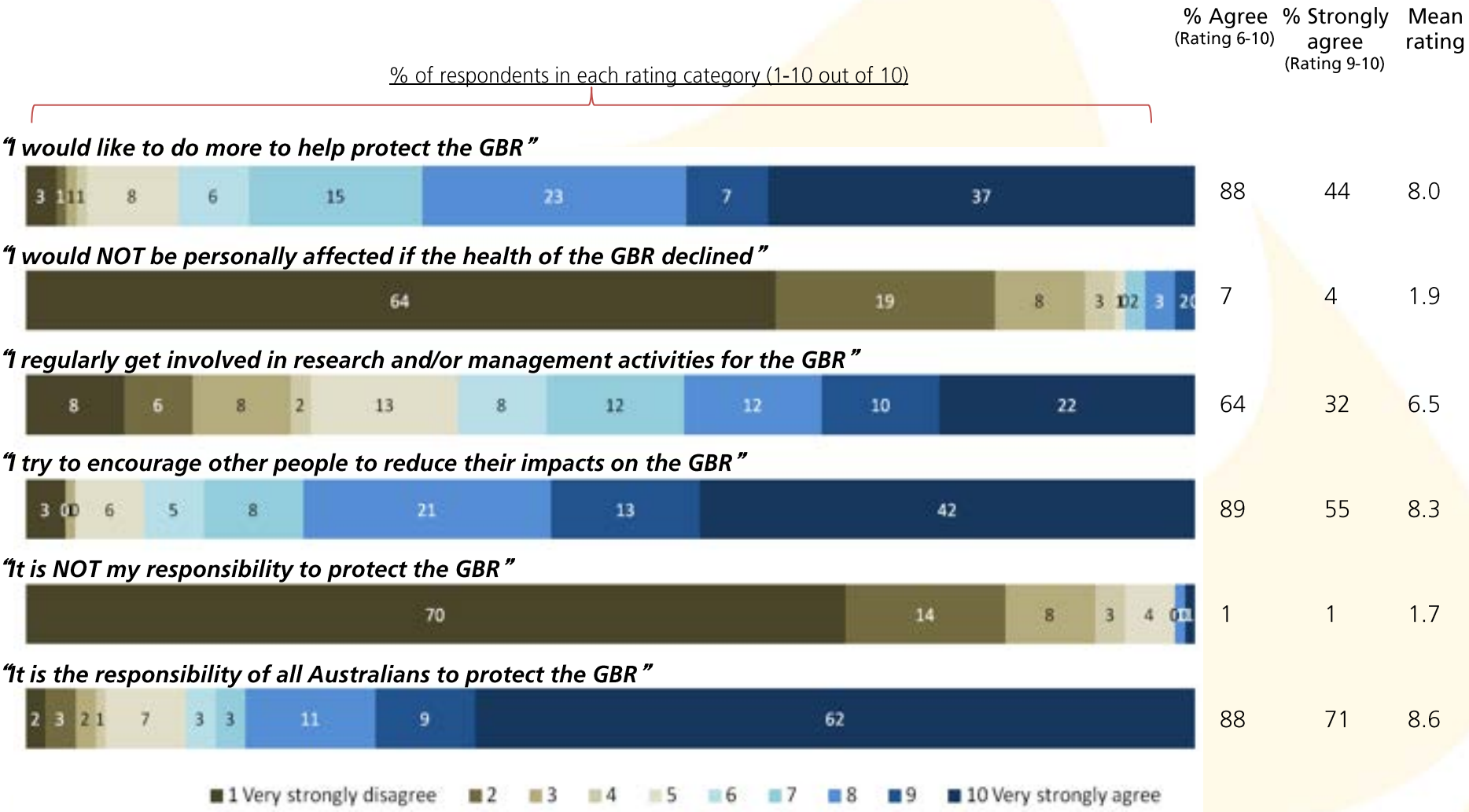


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

GBR stewardship

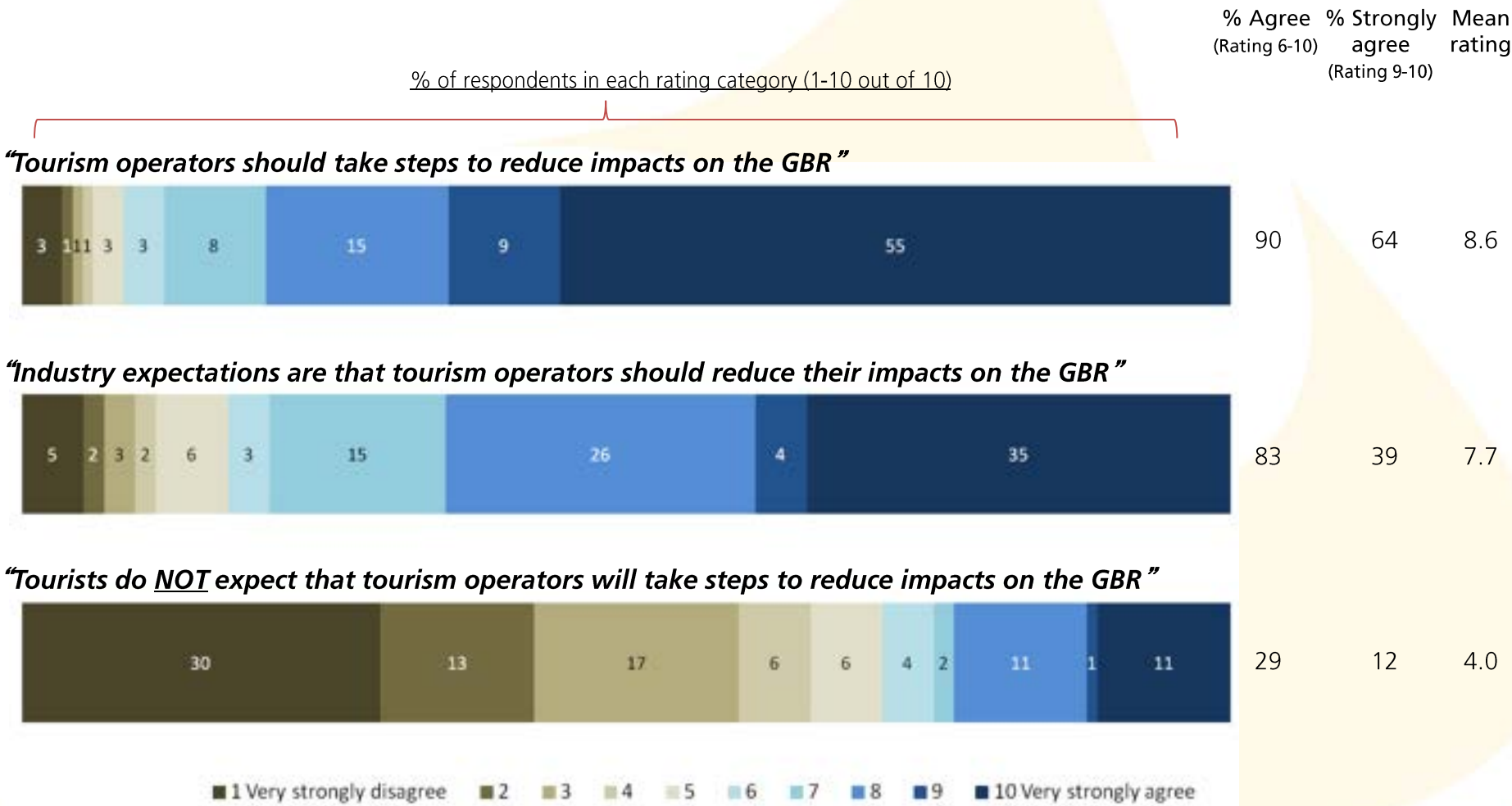


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Industry norms and expectations

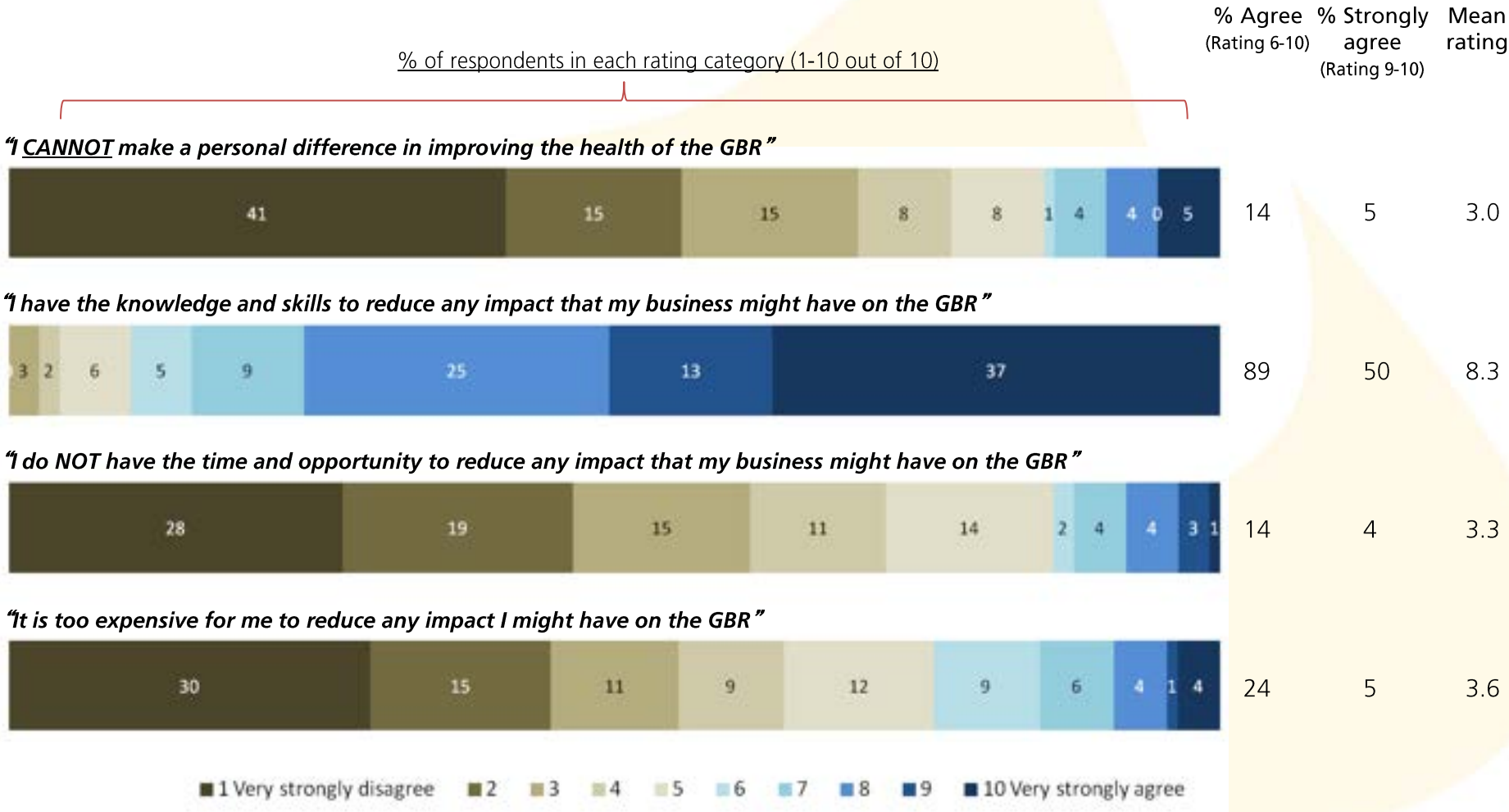


SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Strength of belief in action (empowerment)



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

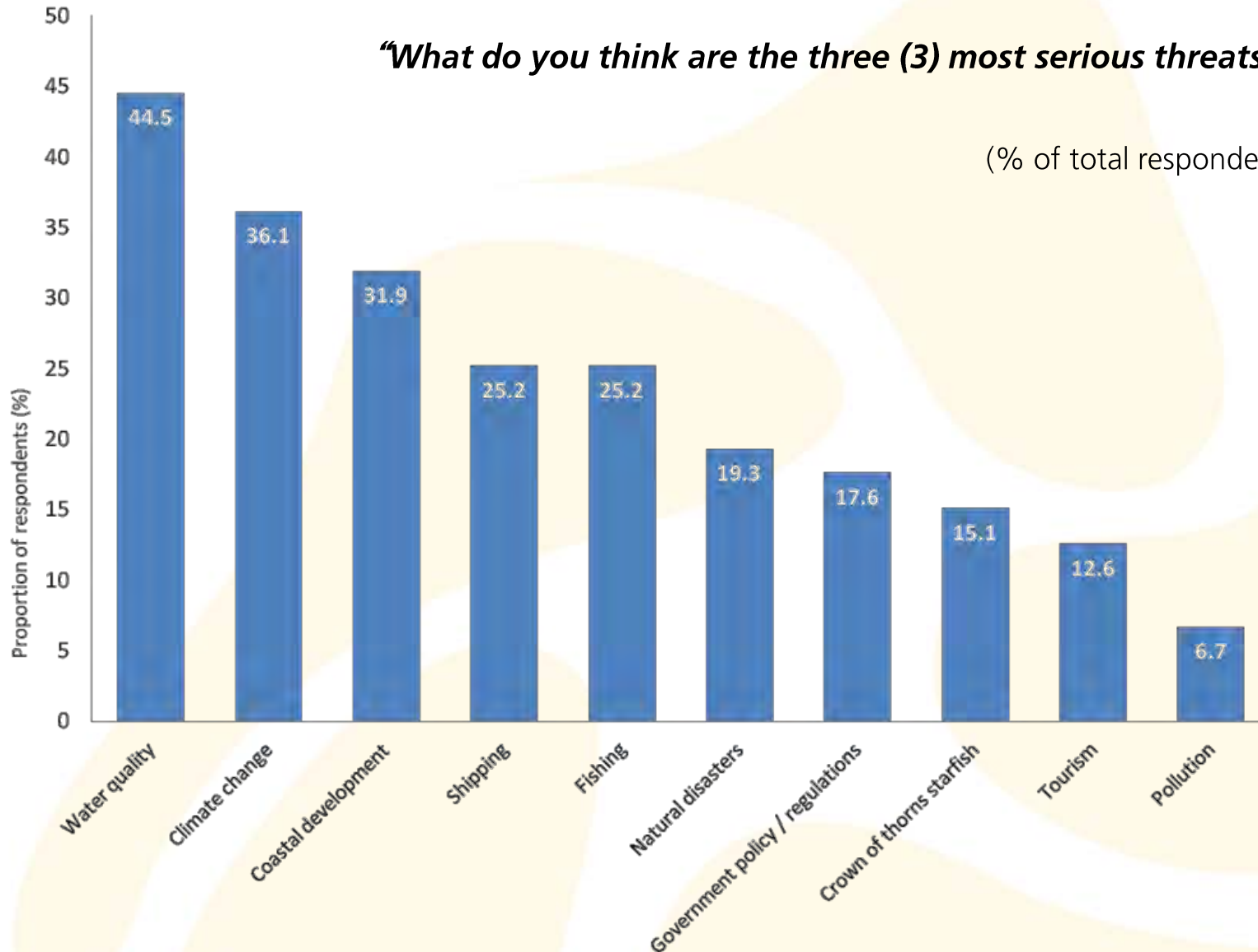
PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

Perceived threats to the GBR

“What do you think are the three (3) most serious threats to the GBR?”

(% of total respondents; n=117)



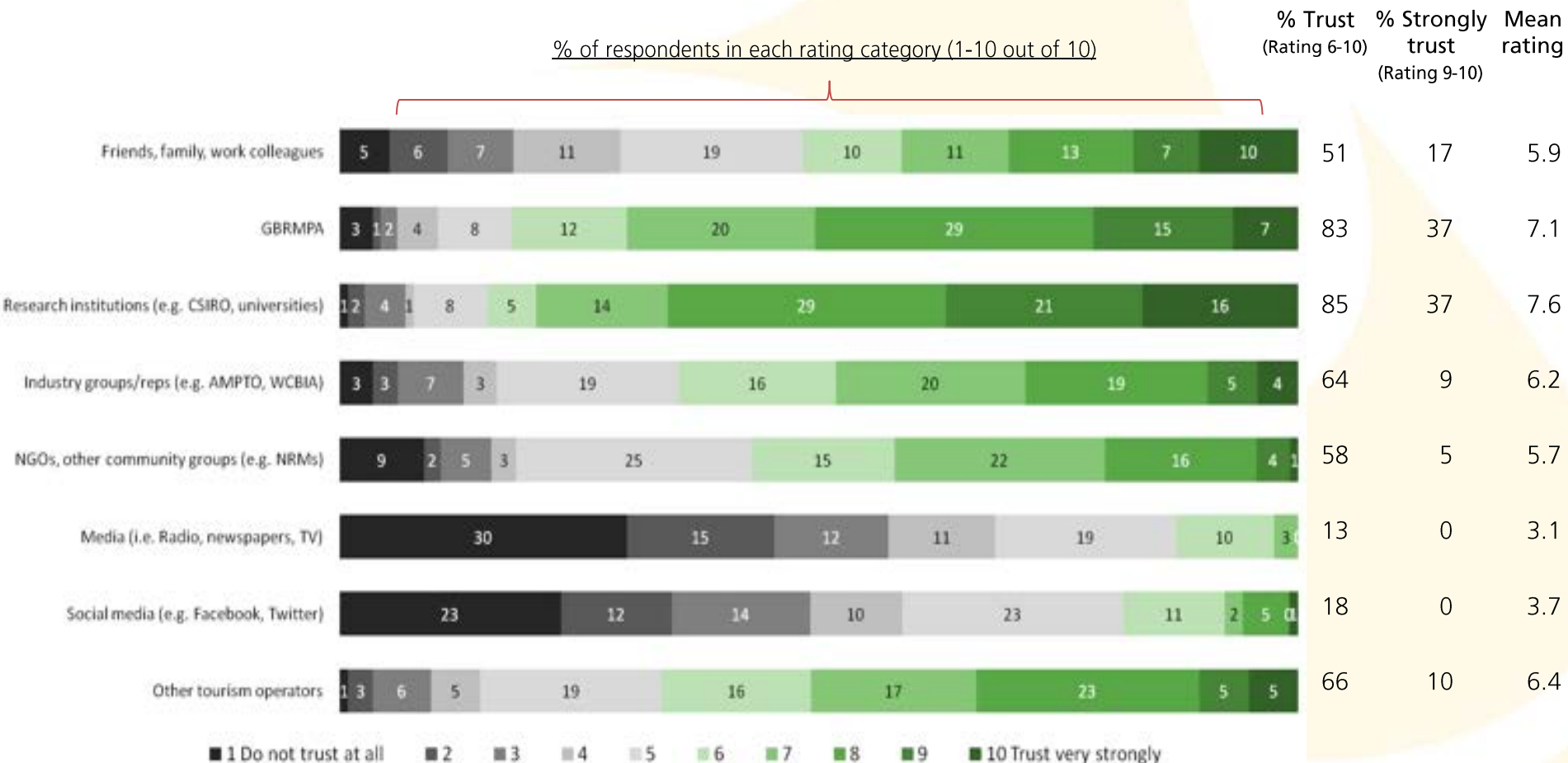
SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

PART B: TOURISM INDUSTRY (social relationship)

GBR Tourism Operator Survey Results

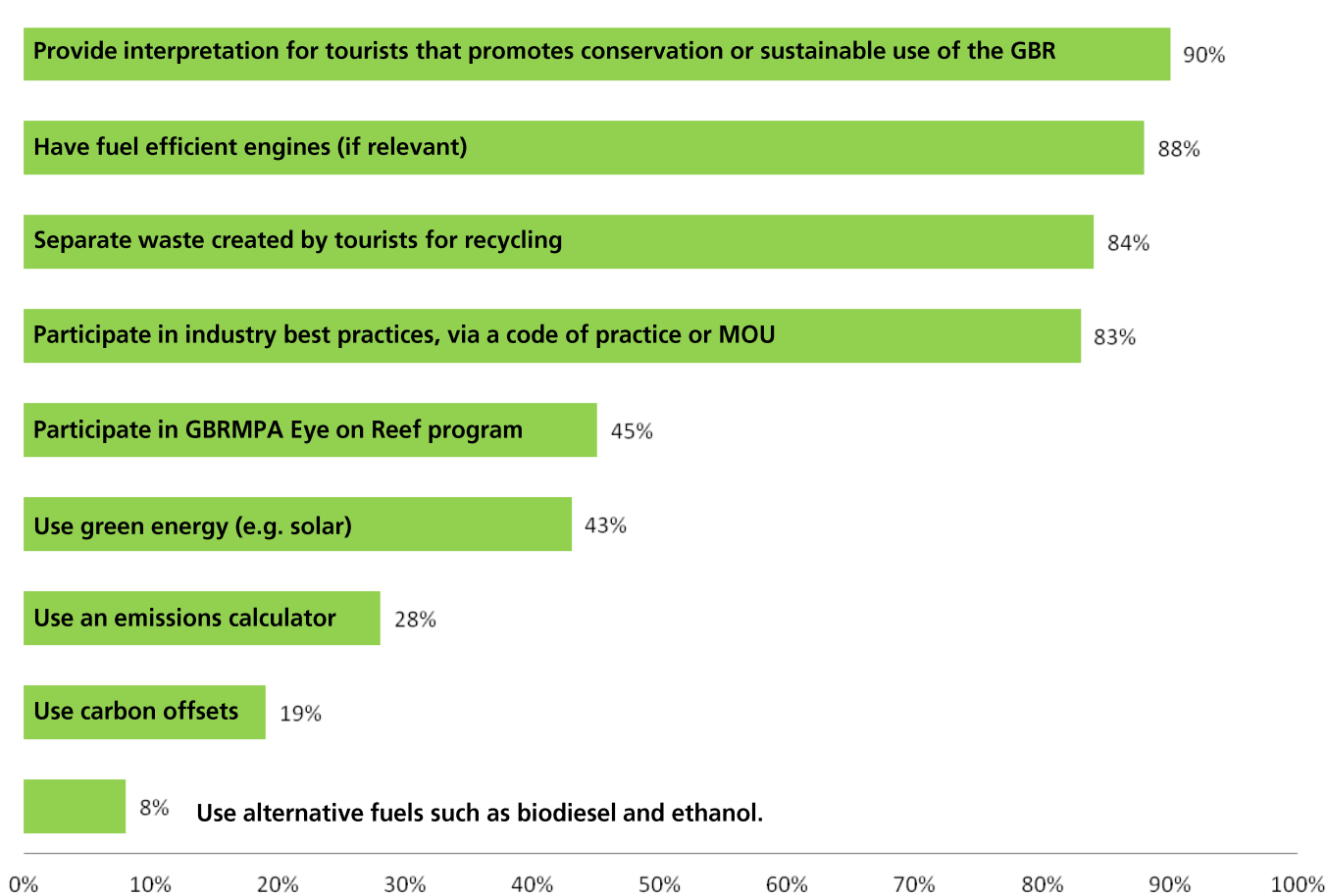
Networks and trust

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



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF
PART B: TOURISM INDUSTRY (social relationship)
GBR Tourism Operator Survey Results
Environmental behaviours

Proportion of respondents participating in environmental behaviour (%)



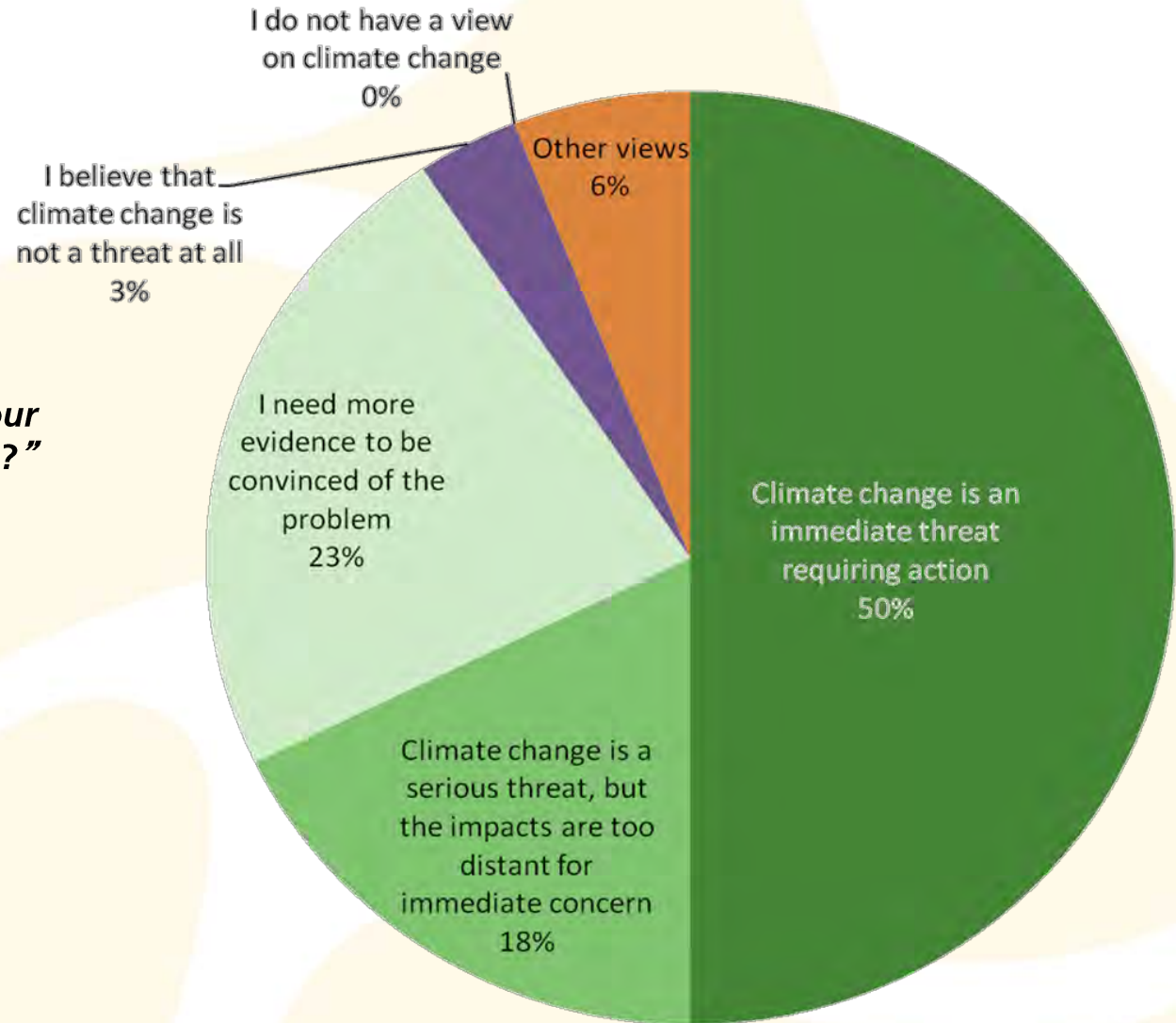
Number of compliance incident reports (tourism industry subject)

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

¹⁸GBRMPA (2013). Unpublished data provided by GBRMPA Compliance Section. Great Barrier Reef Marine Park Authority, Townsville.

SELTMP 2014: 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 2014: TOURISM IN THE GREAT BARRIER REEF

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SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURIST 2013 SURVEY

Researcher use: _____ Date: _____

LOCATION: _____

Tourist Survey

1. What are the first words that come to mind when you think of the Great Barrier Reef?
+ Please list as many words as you like:

Section A: In this section, we would like to know how you use the Great Barrier Reef. When we refer to "the Great Barrier Reef", this includes all land and water from the beaches on the coast, the bays and coves, the islands, the shoals and unflows, the open waters, and of course the coral reefs.

2. Have you visited the Great Barrier Reef during this current visit to the region? ☐ Yes ☐ No-- (if no, please go to Q.8)

3. Considering your most recent trip to the Great Barrier Reef:

a. Where did you visit? (Please mark on the map below, and tell us the name of this place):

b. Did you pay to go on an organised tour on this trip? ☐ Yes ☐ No

c. What were your main activities that you did during this visit?

d. Was this trip to a mainland beach? ☐ Yes (please go to 3c) ☐ No (please go to 3g)

e. Have you been on any trips BEYOND the beach in the past 12 months? (e.g. to an island and/or coral reef) ☐ Yes (please go to 3d) ☐ No (please go to 3f)

f. Where was your most recent trip beyond the beach? (Please mark on the map above (label with "recent"), and tell us the name of this place):

g. How did you get there (e.g. ferry, commercial tour, own boat)?

h. Where was your point of departure (i.e. which township/city on the mainland)?

i. What were your main activities on this particular visit?

4. How long was this trip to the Great Barrier Reef? (i.e. your most recent trip that went beyond the beach, if applicable, or to the beach if you had not gone further out)
☐ 1/2 day or less ☐ Full day ☐ Overnight ☐ 2 to 3 nights ☐ 4 nights or more

5. How many other people went with you in your group? (Please tick one box)
☐ 2 (travelled alone) ☐ 1 other person ☐ 2 to 5 others ☐ 6 to 10 ☐ more than 10

6. How would you rate your overall satisfaction with this experience of the Great Barrier Reef? (Please circle one number)
Extremely Dissatisfied 1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10 Satisfied

7. What had the greatest influence on your satisfaction / dissatisfaction?



SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURIST 2013 SURVEY

B. Activities during this visit to the Great Barrier Reef (GBR) region:

From the following list, please indicate which activities you have done during this visit to the Great Barrier Reef region, and then rate the quality of each experience (on a scale of 1-10 where 1 = very low quality and 10 = very high quality)

Activity:	Tick ONLY if done during this visit	Very Low QUALITY	Very High QUALITY
		1 2 3 4 5 6 7 8 9 10	
Snorkelling	☐	1 2 3 4 5 6 7 8 9 10	
SCUBA diving	☐	1 2 3 4 5 6 7 8 9 10	
Fishing, crabbing or spear-fishing	☐	1 2 3 4 5 6 7 8 9 10	
Swimming	☐	1 2 3 4 5 6 7 8 9 10	
Sailing	☐	1 2 3 4 5 6 7 8 9 10	
Motorised boating	☐	1 2 3 4 5 6 7 8 9 10	
Non-motorised waterports (e.g. kitesurfing, windsurfing)	☐	1 2 3 4 5 6 7 8 9 10	
Motorised waterports (e.g. jet skiing, water skiing)	☐	1 2 3 4 5 6 7 8 9 10	
Lightshow / photography	☐	1 2 3 4 5 6 7 8 9 10	
Wildlife watching	☐	1 2 3 4 5 6 7 8 9 10	
Camping / hiking	☐	1 2 3 4 5 6 7 8 9 10	
Flights (helicopter / seaplane)	☐	1 2 3 4 5 6 7 8 9 10	
Staying seafar from the GBR	☐	1 2 3 4 5 6 7 8 9 10	

Section B. In the following section we would like to know a bit more about your relationship with the Great Barrier Reef region and perceptions of the Great Barrier Reef.

Please read through the following statements, and then rate your level of agreement or disagreement with each statement, by circling a number on the 10-point scale below: (where 1 = Very Strongly Disagree, and 10 = Very Strongly Agree)

Statement: (GBR = Great Barrier Reef)	Very Strongly DISAGREE	Very Strongly AGREE
	1 2 3 4 5 6 7 8 9 10	
9. It means a lot to me that I have been to the GBR.	1 2 3 4 5 6 7 8 9 10	
10. The GBR was an important part of my decision to visit this region.	1 2 3 4 5 6 7 8 9 10	
11. There are many other places that are better than the GBR for the recreation activities I enjoy.	1 2 3 4 5 6 7 8 9 10	
12. I feel proud that the GBR is a World Heritage Area.	1 2 3 4 5 6 7 8 9 10	
13. The GBR is part of my identity.	1 2 3 4 5 6 7 8 9 10	
14. I value the GBR because it supports a variety of life, such as fish and corals.	1 2 3 4 5 6 7 8 9 10	
15. I value the GBR because it supports a desirable and active way of life.	1 2 3 4 5 6 7 8 9 10	

Statement: (GBR = Great Barrier Reef)	Very Strongly DISAGREE	Very Strongly AGREE
	1 2 3 4 5 6 7 8 9 10	
16. I value the GBR because we can learn about the environment through scientific discoveries.	1 2 3 4 5 6 7 8 9 10	
17. I value the GBR because it attracts people from all over the world.	1 2 3 4 5 6 7 8 9 10	
18. I value the GBR for the fresh seafood it provides.	1 2 3 4 5 6 7 8 9 10	
19. The aesthetic beauty of the GBR is outstanding.	1 2 3 4 5 6 7 8 9 10	
20. The place that I most recently visited in the GBR is not in great condition.	1 2 3 4 5 6 7 8 9 10	
21. I feel optimistic about the future of the GBR.	1 2 3 4 5 6 7 8 9 10	
22. I would like to do more to help protect the GBR.	1 2 3 4 5 6 7 8 9 10	
23. I would <u>not</u> be personally affected if the health of the GBR declined.	1 2 3 4 5 6 7 8 9 10	
24. I would like to learn more about the condition of the GBR.	1 2 3 4 5 6 7 8 9 10	
25. I <u>cannot</u> make a personal difference in improving the health of the GBR.	1 2 3 4 5 6 7 8 9 10	
26. I try to encourage other people to reduce their impacts on the GBR.	1 2 3 4 5 6 7 8 9 10	
27. It is <u>not</u> my responsibility to protect the GBR.	1 2 3 4 5 6 7 8 9 10	
28. Tourism operators should take steps to reduce their impacts on the GBR.	1 2 3 4 5 6 7 8 9 10	
29. It is the responsibility of all Australians to protect the GBR.	1 2 3 4 5 6 7 8 9 10	
30. I have the necessary knowledge and skills to reduce any impact that I might have on the GBR.	1 2 3 4 5 6 7 8 9 10	
31. I do not have the time and opportunity required to reduce any impact that I might have on the GBR.	1 2 3 4 5 6 7 8 9 10	
32. It is too expensive for me to reduce any impact I might have on the GBR.	1 2 3 4 5 6 7 8 9 10	

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURIST 2013 SURVEY

33. What do you think are the three (3) most serious threats to the Great Barrier Reef?

- _____
- _____
- _____

Section C. In this section we would like to know a little more about you.

34. Where do you normally live? (please give postcode if within Australia) _____

35. For how many days will you be in the Great Barrier Reef region (including the coastal towns) during this visit? _____ (days)

36. What was the main reason you travelled to the Great Barrier Reef region?

37. Are you a backpacker? ☐ Yes ☐ No

38. What is your main mode of transport during this visit to the region?

39. Is this your first visit to the Great Barrier Reef region? ☐ No ☐ Yes

40. After this visit, do you think you will ever return to the Great Barrier Reef region?

☐ Yes ☐ No

• Please give a brief explanation why:

41. In what year were you born? _____

42. What is your gender? (please tick one box) ☐ Female ☐ Male

43. Do you identify as an Indigenous Australian?
or a Torres Strait Islander? ☐ No ☐ Yes

44. How often do you do the following? (Please tick one box for each item)

- | | | | | |
|--|--------------------------------|------------------------------------|--------------------------------|---------------------------------|
| Recycle | ☐ Never | ☐ Sometimes | ☐ Often | ☐ Always |
| Prioritise environmentally friendly products when shopping | ☐ Never | ☐ Sometimes | ☐ Often | ☐ Always |
| Purchase carbon offsets to counter emissions | ☐ Never | ☐ Sometimes | ☐ Often | ☐ Always |
| Choose accommodation based on their 'green' credentials | ☐ Never | ☐ Sometimes | ☐ Often | ☐ Always |
| Choose a tour operator based on their 'green' credentials | ☐ Never | ☐ Sometimes | ☐ Often | ☐ Always |

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44. Which of the following statements best describes your beliefs about climate change?
(Please tick one box)

- ☐ Climate change is an immediate threat requiring action.
- ☐ Climate change is a serious threat, but the impacts are too distant for immediate concern.
- ☐ I need more evidence to be convinced of the problem.
- ☐ I believe that climate change is not a threat at all.
- ☐ I do not have a view on climate change.

45. On a scale of 1-10, how much do you trust the information you receive about the GBR from the following groups? (1 = Do not trust at all; 10 = Trust very strongly; please circle one number for each group)

Group	Do not trust at all	Trust Very strongly
a. Friends and family, and/or work colleagues	1 2 3 4 5 6 7 8 9 10	
b. Tourist information centre	1 2 3 4 5 6 7 8 9 10	
c. Travel agents	1 2 3 4 5 6 7 8 9 10	
d. Media (i.e. radio, newspapers, TV)	1 2 3 4 5 6 7 8 9 10	
e. Social media (e.g. Facebook, Twitter)	1 2 3 4 5 6 7 8 9 10	
f. Clubs / societies / interest groups	1 2 3 4 5 6 7 8 9 10	
g. Tourism operators	1 2 3 4 5 6 7 8 9 10	

46. Are there any comments you would like to make about this survey?

THANK YOU FOR YOUR HELP WITH THIS RESEARCH!

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SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURISM OPERATOR 2013 SURVEY

Tourism Operator Survey

Researcher initials: _____ Date: _____
 Respondent Name: _____
 Phone No.: _____
 Survey ID: _____

1. What are the first words that come to mind when you think of the Great Barrier Reef?
 Please list as many words as you like:

2. What is your role in the company? ☐ Owner & Mgr ☐ Manager ☐ Other: _____

3. How long have you been involved in the GBR tourism industry? (Total number of years)

4. How long has your current business been operating? (Total number of years)

5. What are the primary types of tourism activity that your company offers?
 (Please choose as many as relevant)

- ☐ Island resort ☐ Ferry ☐ Aircraft / heli-tourism/charter ☐ Bareboat CHARTER
☐ Reef Day trips: SCUBA ONLY ☐ Reef Day trips: SNORKEL ONLY ☐ Reef Day trips: MULTIPLE activities
☐ Reef/Island Day trips: CRUISE ☐ Underwater Dive / snorkel ☐ Underwater Cruise ship
☐ Reef/Island CHARTER FISHING ☐ Reef/Island Multi-purpose CHARTER
☐ Inshore/Water day trips: CRUISE ☐ Inshore/Water trips: CHARTER FISHING
☐ Water sport (activity or hire) ☐ Other equipment rental ☐ Guided/Specialist tour
☐ Other specialist services ☐ Other: please list below:

6. Which tourism activity contributes MOST to the total income for your business?
 (Please choose one only)

- ☐ Island resort ☐ Ferry ☐ Aircraft / heli-tourism/charter ☐ Bareboat CHARTER
☐ Reef Day trips: SCUBA ONLY ☐ Reef Day trips: SNORKEL ONLY ☐ Reef Day trips: MULTIPLE activities
☐ Reef/Island Day trips: CRUISE ☐ Underwater Dive / snorkel ☐ Underwater Cruise ship
☐ Reef/Island CHARTER FISHING ☐ Reef/Island Multi-purpose CHARTER
☐ Inshore/Water day trips: CRUISE ☐ Inshore/Water trips: CHARTER FISHING
☐ Water sport (activity or hire) ☐ Other equipment rental ☐ Guided/Specialist tour
☐ Other specialist services ☐ Other: please list below:

7. About how many days in the previous 12 months were you operating in the GBR?

8. Where is your home port? _____

• Do you use multiple ports? ☐ Yes ☐ No

9. (If relevant) How far, on average, do you travel from your home port? (That is: do you typically operate very close to your home port or do you tend to roam across the region?)

Please tick one:

- ☐ Very local to home port (i.e. <50km) ☐ Close to my home port (50-100km)
☐ Roam quite some distance from home port (>100km) ☐ Other: _____

Please read through the following statements, and then rate your level of agreement or disagreement with each statement, by circling a number on the 50-point scale below.
 (where 1 = Very Strongly Disagree, and 50 = Very Strongly Agree)

Statements: (GBR = Great Barrier Reef)	Very Strongly DISAGREE 1 --- 2 --- 3 --- 4 --- 5	Very Strongly AGREE 6 --- 7 --- 8 --- 9 --- 10
10. There are many other places that are better than the GBR for the tourism operations I do _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
11. I feel proud that the GBR is a World Heritage Area _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
12. The GBR is part of my identity _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
13. I wouldn't want to be anything other than a tourism operator _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
14. The tourism industry to me is not just a job - it is my lifestyle _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
15. I plan to still be a tourism operator in 5 years time _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
16. I live in this region because of the GBR _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
17. I do not plan to live a resident of this region in five years time _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10
18. I am not likely to remain operating in this region if events such as cyclones and floods occur more frequently _____	1 --- 2 --- 3 --- 4 --- 5	6 --- 7 --- 8 --- 9 --- 10

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURISM OPERATOR 2013 SURVEY

23. I value the GBR because it supports a variety of life, such as fish and corals	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
24. I value the GBR because it supports a desirable and active way of life	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
25. I value the GBR because we can learn about the environment through scientific discoveries	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
27. I value the GBR because it attracts people from all over the world	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
28. The GBR is a valuable asset for the economy of this region	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
29. The GBR contributes to my quality of life and well-being	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
25. The aesthetic beauty of the GBR is outstanding	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
26. The areas that my operation uses in the GBR are <u>not</u> in great condition	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
27. I am optimistic about the future of the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10

28. What do you think are the three (3) most serious threats to the Great Barrier Reef?

- i. _____
- ii. _____
- iii. _____

Again, please read through the following statements, and then rate your level of agreement or disagreement with each statement, by circling a number on the 10-point scale below.

(where 1 = Very Strongly Disagree, and 10 = Very Strongly Agree)

Statement:	Very Strongly Disagree	Very Strongly Agree
(GBR = Great Barrier Reef)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
29. I feel confident that the GBR is well managed	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
30. I support the current rules and regulations that affect access and use of the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
31. I feel optimistic about the future of my business in the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
32. My business has not performed as well this year as it did last year	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	

33. I do <u>not</u> have fair access to the GBR compared to other user groups	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
34. Industry rules and regulations create too great a burden on my time	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
35. I would like to do more to help protect the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
36. I would <u>not</u> be personally affected if the health of the GBR declined	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
37. I regularly get involved in research and/or management activities for the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
38. I <u>cannot</u> make a personal difference in improving the health of the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
39. I try to encourage other people to reduce their impacts on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
40. It is <u>not</u> my responsibility to protect the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
41. Tourism operators should take steps to reduce impacts on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
42. Industry expectations are that tourism operators should reduce impacts on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
43. Tourists do NOT expect that tourism operators will take steps to reduce impacts on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
44. It is the responsibility of all Australians to protect the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
45. I have the knowledge and skills to reduce any impact that my business might have on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
46. I do not have the time and opportunity to reduce any impact that my business might have on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
47. It is too expensive for me to reduce any impact I might have on the GBR	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
48. I am confident things will turn out well FOR ME regardless of future events such as floods, cyclones or financial crises	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
49. I am uncertain how to plan for changes in the GBR that may affect me, such as floods, cyclones or financial crises	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
50. I am good at developing scenarios for the future and planning for them	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
51. I discuss new ways of solving problems with others	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10

SELTMP 2014: TOURISM IN THE GREAT BARRIER REEF

APPENDIX 1: SURVEY INSTRUMENTS

Note: survey questions shown below were administered to respondents primarily via the iSurvey application on an iPad mini.

GBR TOURISM OPERATOR 2013 SURVEY

52. I am more likely to adapt to changes as a result of floods or cyclones compared to other coastal residents I know	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
53. I have planned for my financial security	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10
54. I am interested in learning how to better prepare for significant events, such as the global financial crisis, cyclones and floods	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10

55. Do you:

- a. Have fuel efficient engines? ☐ Yes ☐ No
- b. Use an emissions calculator to plan your business operations? ☐ Yes ☐ No
- c. Use carbon offsets to counter emissions? ☐ Yes ☐ No
- d. Use green energy, such as solar panels, for any part of your business? ☐ Yes ☐ No
- e. Use alternative fuels such as biodiesel and ethanol? ☐ Yes ☐ No
- f. Participate in industry best practices, via a code of practice or MOU? ☐ Yes ☐ No
- g. Participate in GBRMPA's Reef Guardian Program? ☐ Yes ☐ No
- h. Provide interpretation for tourists that promotes conservation or sustainable use of the GBR? ☐ Yes ☐ No
- i. Separate waste created by tourists for recycling? ☐ Yes ☐ No

56. Which one of the following statements best describes your beliefs about climate change?

(Please tick one box)

- a. ☐ Climate change is an immediate threat requiring action
- b. ☐ Climate change is a serious threat, but the impacts are too distant for immediate concern
- c. ☐ I need more evidence to be convinced of the problem
- d. ☐ I believe that climate change is not a threat at all
- e. ☐ I do not have a view on climate change

57. On a scale of 1-10, how much do you trust the information you receive about the GBR from the following groups?	Very low Trust	Very high Trust
a. Friends, and family, and/or work colleagues	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
b. GBRMPA	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
c. Research institutions (e.g. CSIRO, Universities)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
d. Industry Groups/representatives (e.g. tour operators, Blue Star, WGBA)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
e. Non-Government Organisations/other community groups (e.g. WWF, Greenpeace)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
f. Media (e.g. radio, newspapers, TV)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
g. Social media (e.g. Facebook, Twitter)	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	
h. Other tourism operators	1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10	

Section C: In this section we would like to know a little more about you.

- 58. a) In what year were you born? 19_____
- b) What is your current home postcode? _____
- c) For how many years have you lived in the Great Barrier Reef region? (i.e. all coastal areas between Cape York and Bundaberg) _____ (years)
- d) Are you currently married or have a partner? ☐ Yes ☐ No
- e) Do you have any dependent children? ☐ Yes ☐ No
- f) Do you have university or TAFE education (beyond high school)? ☐ Yes ☐ No
- g) What proportion of your household income came from tourism in the last financial year? _____ (%)

59. How many employees (full-time equivalents) did your operation employ over the previous 12 months? _____

60. Do you have insurance for your business assets? ☐ Yes ☐ No

61. (if relevant) When did you last purchase a main vessel? _____ (year)

62. a) What proportion of your customers came from your LOCAL region? _____ %

b) What proportion of your customers came from elsewhere in QLD? _____ %

c) What proportion of your customers came from INTERSTATE? _____ %

d) What proportion of your customers came from OVERSEAS? _____ %

63. Could you please indicate (approximately) your business turnover (entire revenue) for the past 12 months, in broad categories?

(Please tick one box)

- ☐ < \$20,000
- ☐ \$20,001 to \$100,000
- ☐ \$100,001 to \$500,000
- ☐ \$500,001 to \$1m
- ☐ Between \$1m and \$5m
- ☐ more than \$5m

64. May we please contact you in the next 12-24 months to participate in a follow-up study?

☐ Yes ☐ No

65. What is your gender? (please tick one) ☐ Female ☐ Male

Thank you for your support for this research!



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