

**REEF TOURISM
QUARTERLY REPORT # 3
Airlie Beach
May – July 2007**

This quarterly report forms part of a series of reports presented by the Australian Government's Marine and Tropical Sciences Research Facility (MTRSF), represented in North Queensland by the Reef and Rainforest Research Centre, and James Cook University (JCU) on reef tourism in the Great Barrier Reef (GBR). The aims and methodology of this research are presented in the introduction below. The data presented in this report summarise the results from the third quarter of data collection in Airlie Beach between May and July 2007. A total of 112 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: Results from the first and second quarters of data collection (November 2006 – January 2007; and February – April 2007 respectively) are included in this report for the purpose of comparison and are shown next to the current quarter's results in brackets. In some cases figures may have been rounded. A total of 317 surveys were collected in the first two quarters.



1. INTRODUCTION



The research described here falls under MTRSF's research program to identify **sustainable use and management of marine resources of the Great Barrier Reef** and specifically the **analysis of tourism use and impact on the Great Barrier Reef for managing sustainable tourism**. This program will identify annual visitor usage patterns of the GBR to enable the identification of key trends and drivers of visitor patterns.



2. METHODOLOGY



The principle methodology for this research is visitor surveys distributed through participating tourism operators. Crew from these marine tourism operators distribute and collect the surveys at five locations across the Great Barrier Reef (Port Douglas, Cairns, Townsville, Airlie Beach and the Southern Region). Results are available in an aggregate form as well as regionally, such as the report presented here. Ten operators are currently involved in this research. A total of 112 surveys were collected in this quarter. Data is collected

on reef visitors' socio-demographic characteristics, as well as travel patterns, motivations, activities, alternative destinations considered, satisfaction (including expectations and best and worst experiences).



3. LIMITATIONS



Data collection from the Japanese markets is yet to be put in place, whilst randomisation and survey return issues remain to be solved.



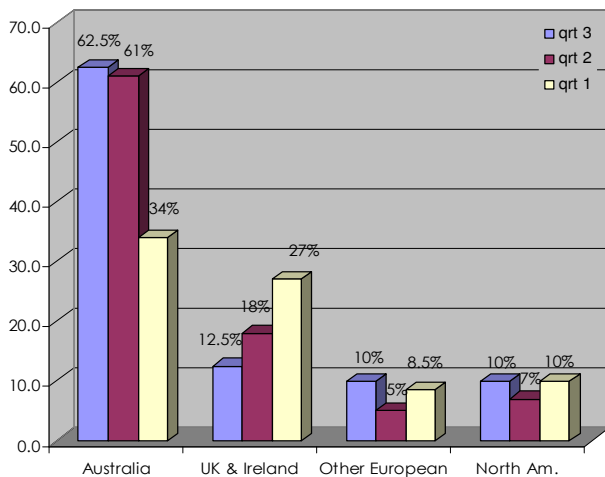
4. FINDINGS



Origin of Respondents

The sample consisted of a lower proportion of males (39.5%) to females (60.5%) than in previous quarters. Most respondents were from Australia (62.5%), of which 35% were from Queensland.

Figure 1: Origin of respondents.



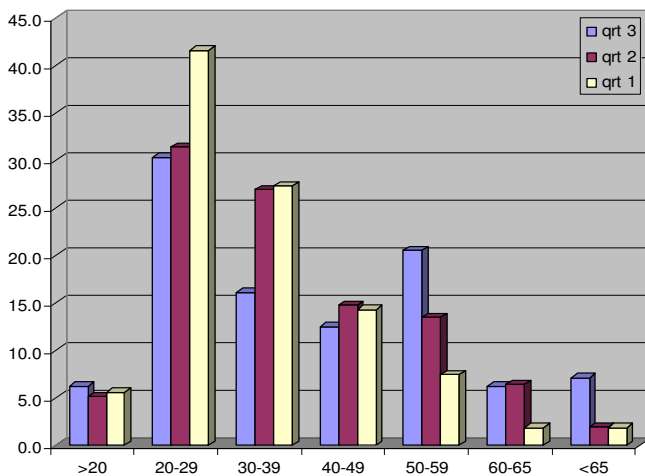
Employment

In terms of **employment**, the most common responses were:

	Quarter 3	Quarter 2	Quarter 1
Professionals	26%	25%	29%
Students	14.5%	15%	16%
Self-employed	7.1%	7%	10%

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were travelling:

	Quarter 3	Quarter 2	Quarter 1
With a partner or spouse	40%	42%	44%
With friends	15%	25%	14.5%
With family / relatives	30%	20%	12.5%

Previous Visits

For 75% of respondents, this was their first visit to Far North Queensland. Of those who had visited the region previously, most (81%) had visited the region more than once before.

Accommodation and Transport

Most respondents, 15%, (26%) were staying in backpackers' accommodation and another 10.5% were staying in hotels (20%), whilst staying in a caravan park was also popular with 31% of respondents preferring this option. A total of 66% of respondents stayed in the region for between two and five nights. Fewer respondents, 21.5% (33%) flew into the region as their main mode of transport, while more respondents 44.5% (31%) used private or rented vehicles to reach their destination. Travel by bus or coach was the next most popular transportation for 20% (22.5%) of respondents.

Last Holiday Location

The most popular single destinations given in response to "Where did you spend your last holiday?" are provided in the table below.

OVERALL RESPONDENTS (N=96)	
Gold Coast	5%
Cairns	4%
New Zealand	4%
Spain	4%
INTERNATIONAL RESPONDENTS (N=36)	
Europe	33.5%

USA	22%
Cairns	8.5%
Greece	8.5%
DOMESTIC RESPONDENTS (N=58)	
Gold Coast	8.5%
Perth	5%
Thailand	5%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=93)		
Queensland	25%	(14.5%)
Australia (except Queensland)	21.5%	(24%)
Europe	21%	(30%)
New Zealand, Pacific and South-east Asia	17%	(12%)
North America (including Caribbean)	12%	(10%)
Asia	4.5%	(5.5%)
Africa and Latin America	0%	(9%)
INTERNATIONAL RESPONDENTS (N=35)		
Europe	37%	(43%)
North America (including Caribbean)	25.5%	(16%)
Queensland	17%	(6%)
New Zealand, Pacific and South-east Asia	14.5%	(12.5%)
Asia	6%	(4%)
Australia	0%	(5.5%)
Africa and Latin America	0%	(13%)
DOMESTIC RESPONDENTS (N=58)		
Australia (except Queensland)	34.5%	(39%)
Queensland	29%	(23%)
New Zealand, Pacific and South-east Asia	19%	(12%)
Europe	10.5%	(9.5%)
Asia	3.5%	(5.5%)
North America (including Caribbean)	3.5%	(2%)
Africa and Latin America	0%	(3%)

Alternative Destinations Considered

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

- Cairns 12%
- Whitsundays 7%
- Brisbane 5.5%
- Darwin 5.5%

Motivations

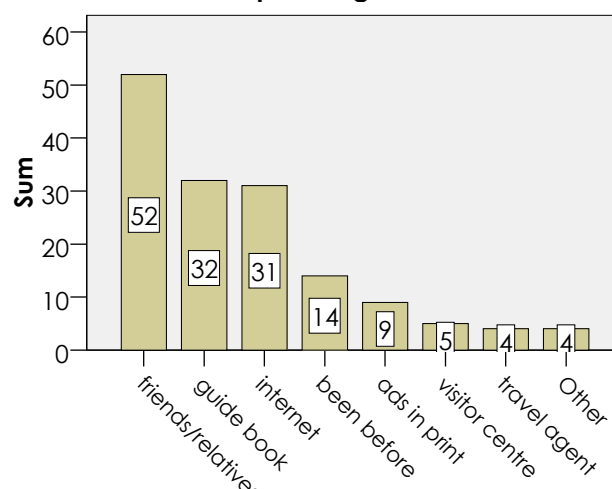
The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef.... 4.57%* **(4.5%)**
- Snorkelling and diving..... 4.02% **(4.25%)**
- Rest and relax..... 4.08% **(4.1%)**
- Visit the islands..... 4.16% **(4%)**

* Shown as a mean.

Information Sources

Figure 3: Information sources used in planning.



Previous Visits to the Reef

For 62.5% (65%) of respondents, this was their first visit to the reef. Of those who had been to the reef before, 84% (81.5%) had been between one and four times before.

Choice of Tour Operator

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

	Quarter 3	Quarter 2	Quarter 1
Price	24%	16.5%	20%
Package tour	19%	7%	13.5%
Advertising	13%	11.5%	8.5%
Recommended by others	12%	10.5%	-
Availability	11%	8%	4.5%

Diving Profile

When asked if they planned to dive the reef, 20.5% (35%) of respondents said "Yes". 31.5% (36%) of respondents had no previous diving experience; 31.5% of respondents had completed between one and four dives; and 6.5% had completed between five and ten dives. A total of 31.5% of respondents had completed more than ten dives.

Visits to Other Reefs

Over 40.5% (40%) of respondents had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination by those respondents who had visited other reefs was "other Australian reefs", mentioned by 20.5% (15%) of respondents*. Other frequently visited reefs include Micronesia, 16%. 82% (83%) of respondents who had visited other Australian reefs felt that the other reefs were the same or better, whilst no respondents gave any comparative data between Micronesian reefs and the Australian reef/s they had visited.

* Whilst respondents were asked if they had been to reefs in Australia other than the Great Barrier Reef (e.g. Ningaloo, WA), it is apparent that some respondents replied that they had been to other reefs located within the Great Barrier Reef.

Perceptions of the Reef Trip

In descending order of frequency, **perceptions of the reef tours** were:

	Quarter 3	Quarter 2	Quarter 1
"A relaxing, fun filled day on the reef"	45.5%	53.5%	51%
"A fantastic reef tour for all"	43%	37%	33%
"An introduction to the reef"	21.5%	24%	21.5%

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 3	Quarter 2	Quarter 1
Glass-bottom boat	62.5%	82%	48%
Snorkelling	68%	76%	86%
View marine mammals	61.5%	69.5%	30%
Swimming	41%	52.5%	53.5%
Diving	20.5%	20.5%	17.5%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 = very low, to 10 = very high) were generally high, with scores of 9 and 10 accounting for 50% of all responses, and the mean satisfaction score was 8.45 (8.15).

86.4% (83%) of respondents felt that they achieved value for money, and 87.5% (90%) said they would recommend the trip to other travellers.

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

	Quarter 3	Quarter 2	Quarter 1
Staff / service / professionalism	26%	33%	38%
Weather / sea state (sea sick)	18.5%	13%	28%
National environment	12.5%	25%	32%
Food and beverages	10.5%	20%	14%

Tourists' **best experiences** included:

	Quarter 3	Quarter 2	Quarter 1
Diving / snorkelling	22.5%	29.5%	31.5%
Marine life	9.5%	28%	7%
Staff / service / professionalism	7.5%	6.5%	10%
Food and beverages	5%	10%	8.5%

Tourists' **worst experiences** included:

	Quarter 3	Quarter 2	Quarter 1
Weather / sea state (sea sick)	28.5%	36%	32%
None	47%	11.5%	-
Comfort / safety	5%	-	-
Food and beverages	3.5%	8.5%	6%
Poor coral / no fish	-	7.5%	15%

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

	Reef	Trip
Not at all	2% (3.5%)	1% (7.5%)
Not very much	3.5% (6%)	38% (5.75%)
Somewhat	38.5% (40%)	0% (31.5%)
Very much	56% (52.5%)	61% (52.5%)

For further information about this project contact James Cook University:

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

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

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