

**REEF TOURISM
QUARTERLY REPORT # 1
Airlie Beach
November 2006 – January 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 first quarter of data collection in Airlie Beach between November 2006 and January 2007. A total of 161 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.



1. INTRODUCTION



The research described here falls under the MTRSF research program that identifies **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. Fourteen operators are currently involved in this research. 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



During this period, the major limitations included poor weather and low visitor numbers.



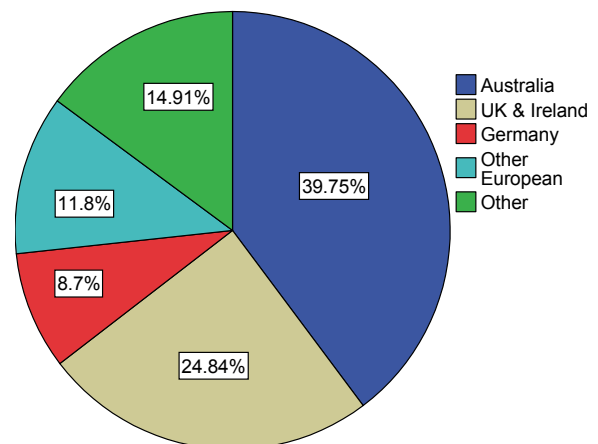
4. FINDINGS



Origin of Respondents

The sample consisted of 56% females and 44% males. Most respondents were from the Australia (40%), of which 38% were from Queensland.

Figure 1: Origin of respondents.



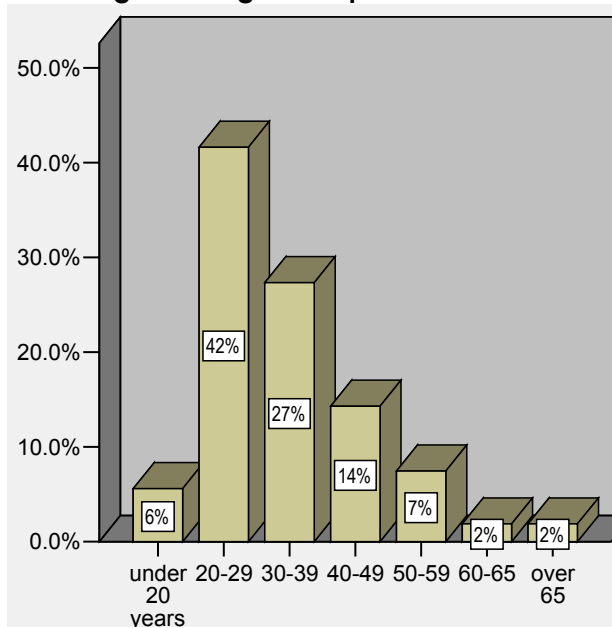
Employment

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

- Professionals (29%);
- Students (16%); and
- Self-employed (10%).

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were **traveling**:

- With a partner or spouse44%
- With their family/relatives 14.5%
- With friends 12.5%

Previous Visits

For 80% of respondents, this was their first **visit to Far North Queensland**. Of those who had visited the region previously, over one-third (26%) had visited more than 10 times before. Of the remainder, 40% had visited twice before. The majority of respondents (40%) stayed two to four nights.

Accommodation and Transport

More than one-third of respondents were staying in backpackers' **accommodation** (33%), and 20% of respondents chose hotels, whilst caravan parks were nearly equally popular (14.5%). Over 30% of respondents flew into the region as their **mode of transport**, a quarter arrived by bus/coach and another 33% used private

vehicles or rented cars to reach their intended destination.

Previous 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=159)	
SPAIN	17.5%
GREECE	12.5%
ITALY	11%
CANADA	9.5%
NEW ZEALAND	9.5%
EGYPT	8%
GOLD COAST	8%
CAIRNS	6.5%
USA	6.5%
CHINA	4.5%
INTERNATIONAL RESPONDENTS (N=97)	
SPAIN	9%
GREECE	8%
ITALY	7%
CANADA	6%
EGYPT	4%
CAIRNS	3%
FRANCE	3%
NEW ZEALAND	3%
TURKEY	3%
USA	3%
DOMESTIC RESPONDENTS (N=64)	
GOLD COAST	2.5%
EUROPE	2%
MELBOURNE	2%
NEW ZEALAND	2%
ADELAIDE	1.3%
BRISBANE	1.3%
CHINA	1.3%
SPAIN	1.3%

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

OVERALL RESPONDENTS (N=161)	
EUROPE	40.5%
QUEENSLAND	13%
AUSTRALIA	12%
NORTH AMERICA (inc. Carribean)	12%
NZ, PACIFIC & SOUTH-EAST ASIA	9.5%
AFRICA & LATIN AMERICA	9%
ASIA	2.5%
INTERNATIONAL RESPONDENTS (N=97)	
EUROPE	56%
NORTH AMERICA (inc. Carribean)	17.5%
AFRICA & LATIN AMERICA	11.5%
NZ, PACIFIC & SOUTH-EAST ASIA	6.5%
QUEENSLAND	4%
ASIA	2%
AUSTRALIA	1%
DOMESTIC RESPONDENTS (N=64)	
AUSTRALIA	28%
QUEENSLAND	26.5%
EUROPE	10.7%
NZ, PACIFIC & SOUTH-EAST ASIA	14%
NORTH AMERICA (inc. Caribbean)	3%
AFRICA & LATIN AMERICA	3%
ASIA	3%

Alternative Destinations Considered

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

DESTINATION	
NONE	12.7%
CAIRNS	6.7%
MELBOURNE	6.5%
SYDNEY	5.7%
NEW ZEALAND	4.4%
BRISBANE	4.1%
THAILAND	3.9%
GOLD COAST	3.4%
FRASER ISLAND	2.8%

Motivations

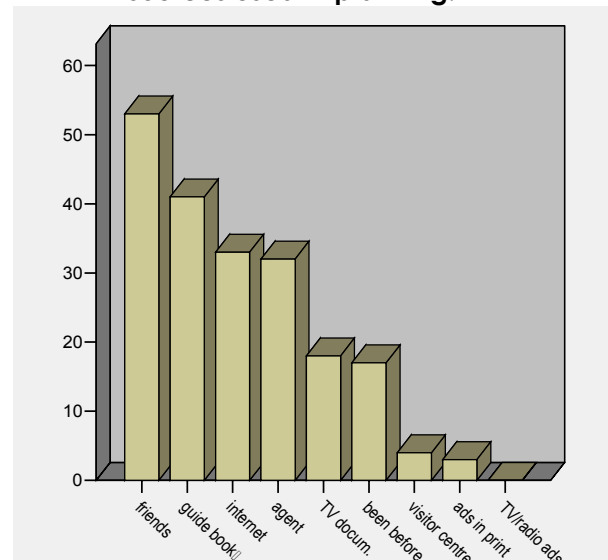
The most **important motivations** (measured on a scale of 1 – not at all important, to 5 – very important) for visiting the region include:

- Visit the Great Barrier Reef 4.5 (mean)
- Snorkelling and diving 4.25
- Rest and relaxation 4
- Visit the islands 4

Information Sources

Examples of information sources used to plan the holiday are shown in Figure 3.

Figure 3: Information sources used in planning.



Previous Visits

For most respondents (69%), this was their **first visit to the reef**. Of those who had been to the reef before, 72% had been once or twice before.

Choice of Operator

The most common reasons for **choosing reef tour operators** were:

- Recommended to respondents 42%
- Price 20%
- Package 13.5%

Diving Profile

When asked if they **planned to dive** the reef, 28% of respondents said 'Yes'. Only 25 respondents stated how many dives they had previously completed, seven of whom had no previous diving experience. Nine respondents had undertaken between one and four dives previously, and only nine respondents had undertaken more than five dives.

Visits to Other Reefs

Over forty percent of respondents had **visited other coral reefs** before coming to the Great Barrier Reef, although the most commonly cited alternative destination was other Australian reefs (15%),

sometimes mistaken for other reefs on the Great Barrier Reef. The majority of respondents (80%) felt that **other Australian reefs were the same as or better than the Great Barrier Reef**.

Perceptions of the Reef Trip

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

- "A relaxing, fun filled day on the reef"51%
- "A fantastic reef tour for all"33%
- "Introduction to the reef" 21.5%

Activities Undertaken

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

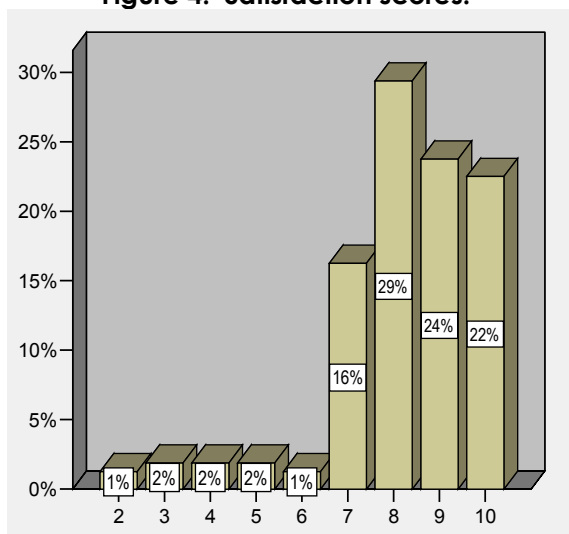
- Snorkelling86%
- Glass-bottom boat reef tour48%
- Swimming 53.5%
- Visiting the islands34%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 – very low satisfaction, to 10 – high level of satisfaction) were generally high, with scores of 9 and 10 accounting for 46% of the all responses, and the mean satisfaction score was 8.2.

Eighty-seven percent of respondents felt that they achieved **value for money** and 90% said they would **recommend the trip** to others.

Figure 4: Satisfaction scores.



The five factors that influenced satisfaction (either positively or negatively) most frequently include:

- Staff / service / professionalism..... 38%
- Natural environment 32%
- Weather / sea state (sea sick) 28%
- Food and beverages 14%

Tourists' **best experiences** include:

- Diving / snorkelling 31.5%
- Coral 11%
- Staff / service / professionalism..... 10%
- Marine life..... 7%

Tourists' **worst experiences** include:

- Weather / sea state (sea sick) 32%
- Poor coral / no fish 15%
- Comfort / safety 12%
- Boat / facilities 17%

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

	Reef	Trip
Not at all	2.5%	10.5%
Not very much	6.5%	5.5%
Somewhat	36.5%	31.5%
Very much	54.5%	52%

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