

REEF TOURISM QUARTERLY REPORT 5 Airlie Beach Quarter 1, Year 2

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 from the second year (N = 82); the results from the same quarter in the first year of data collection (N = 104); and the overall results for the period between November 2006 and March 2008 (N = 700). The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

Note: For purposes of comparison, the figures for the entire sample and the same quarter from Year 1 are provided in the text in brackets after the figures for this quarter (Quarter 5).



1. INTRODUCTION



The research described here falls under the MTRSF 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. Results are presented quarterly.



2. METHODOLOGY



The principle methodology for this research is visitor surveys distributed through participating operators. Crew from these marine tourism operators distribute and collect the surveys at four locations across the Great Barrier Reef (Port Douglas, Cairns, Townsville and Airlie Beach). Results are available in an aggregate form as well as regionally, such as the report presented here. Currently, ten operators are involved in this research. A total of 82 surveys were collected in the first quarter of Year 2.

Data are collected on reef visitors' socio-demographic characteristics, and travel patterns, motivations, activities, alternative destinations considered and levels of satisfaction (including expectations and best and worst experiences).



3. LIMITATIONS



Data collection from the Asian market is yet to be established. Sampling bias by crews must also be considered.



4. FINDINGS



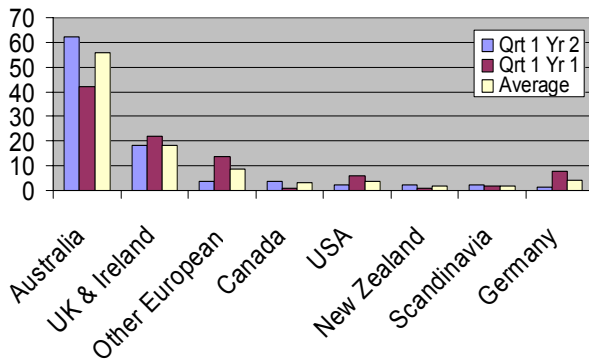
Origin of Respondents

This quarter's sample did not vary much from the usual pattern of almost equal number of men, 43.9% (47.1%;¹ 42.6%;²) and women, 56.1% (52.9%; 57.4%). Half of the respondents, 62.2% (44.2%; 55.6%), were from Australia, of which 28.0% were from Queensland (Figure 1).

¹ Quarter 1, Year 1.

² Overall sample.

Figure 1: Origin of respondents.



Employment

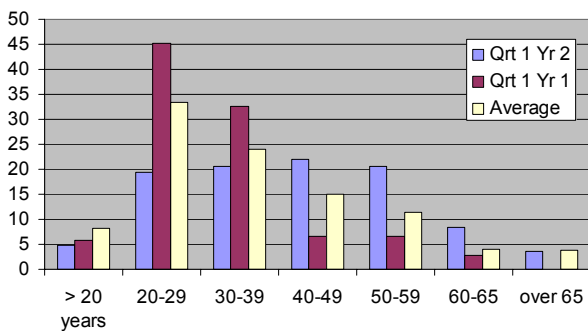
In terms of **employment**, the most common responses were (as a percentage of the total):

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Professionals	23.2%	28.8%	26.7%
Management	11.0%	1.9%	8.2%
Students	6.1%	22.1%	14.6%
Self-employed	6.1%	5.8%	8.1%
Retired	3.3%	4.8%	7.2%

Age of Respondents

Respondents in this area of the GBR fell predominantly into the 20-29 year age bracket (Figure 2).

Figure 2: Age of respondents.



Travel Party

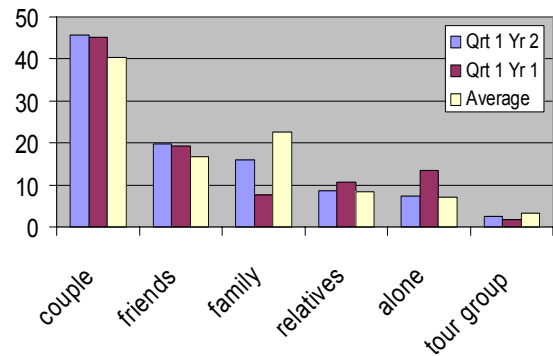
The majority of respondents were travelling with their partner, as shown in Figure 3.

Previous Visits

For 69.1% (81.7%; 76.5%) of respondents, this was their first visit to the region. The

average length of stay was 2-5(2-5; 2-7) nights.

Figure 3: Respondents' travel party (%).



Accommodation and Transport

Figure 4: Respondents' choice of accommodation(%).

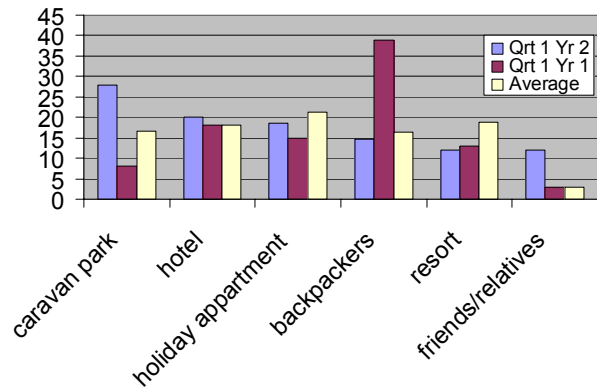
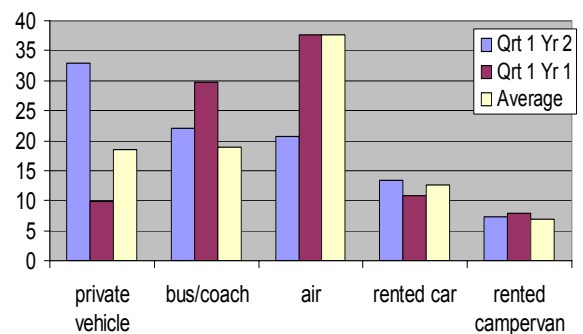


Figure 5: Respondents' choice of transport (%).



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=81)	
New Zealand	6.1%
Gold Coast	4.9%

France	4.9%
Melbourne	3.7%
USA	3.7%
INTERNATIONAL RESPONDENTS (N=30)	
New Zealand	13.3%
France	10.0%
USA	10.0%
DOMESTIC RESPONDENTS (N=51)	
Gold Coast	7.8%
Melbourne	5.9%
Tasmania	5.9%

A thematic/regional analysis shows the following trends:

OVERALL RESPONDENTS (N=81)	
Australia, excluding Queensland	23.5%
Europe	18.3%
Queensland	16.0%
NZ, Pacific and South-east Asia	12.3%
North America (inc. Caribbean)	7.4%
Africa and Latin America	6.2%
Asia	3.7%
INTERNATIONAL RESPONDENTS (N=30)	
Europe	30.0%
North America (inc. Caribbean)	20.0%
NZ, Pacific and South-east Asia	16.7%
Africa and Latin America	10.0%
Australia	6.7%
Queensland	6.7%
Asia	3.3%
DOMESTIC RESPONDENTS (N=51)	
Australia, excluding Queensland	34.0%
Queensland	22.0%
Europe	12.0%
NZ, Pacific and South-east Asia	10.0%
Africa and Latin America	4.0%
Asia	4.0%

Alternative Destinations Considered

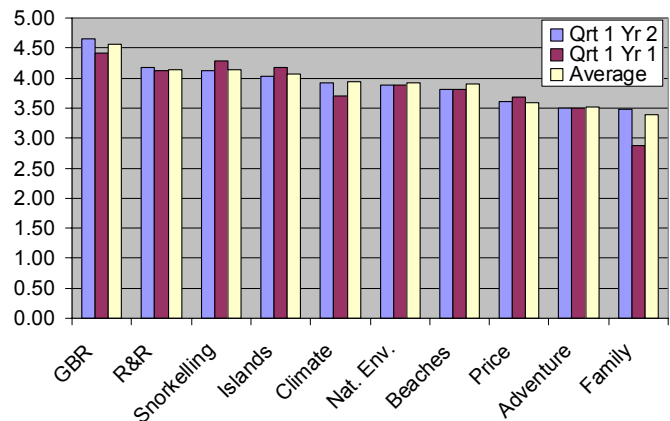
The most popular alternative destinations considered when planning this trip were:

Destination	
Cairns	11.26%
New Zealand	4.64%
Fiji	3.97%
Sydney	2.65%
Thailand	2.65%
Uluru	2.65%
Brisbane	2.65%

Motivations

The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include visiting the reef, rest and relaxation and snorkelling (Figure 6).

Figure 6: Respondents' motivations to visit the region (mean).



Information Sources

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Friends and Relatives, or other	37.8%	33.0%	40.4%
Guidebook	24.4%	30.1%	27.0%
Internet	22.0%	25.0%	22.0%
Previous trip	18.3%	10.2%	13.3%
Ads in print	4.9%	4.1%	4.7%

Previous Visits to the Reef

For 67.9% (62.5%; 68.8%) respondents this was their first visit to the reef.

Choice of Tour Operator

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Recommended by friend / relative, or other	18.0%	12.5%	15.8%
Price	17.0%	18.8%	12.6%
Advertising	13.4%	12.5%	9.6%
Availability	11.1%	7.5%	13.9%
Recommended by agent	6.9%	12.5%	12.5%

Diving Profile

When asked if they planned to dive the reef, 26.9% (34.3%; 29.5%) of respondents said yes. 13.6% (20.0%; 42.8%) of these respondents had no previous diving experience, 31.8% (5.0%; 25.5%) had one to four dives, 5.6% (31.3%; 10.3%) had five to 10 dives and only 33.2% (27.2%; 21.4%) had more than 10 dives.

Visits to Other Reefs

Over 39.7% (40.6%; 41.7%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destination was Micronesia 8.5% (7.7%; 7.4%), Hawaii 6.1% (4.8%; 5.7%), the South Pacific 4.9% (10.6%; 8.4%) and South-east Asia 2.4% (10.6%; 10.1%).

Activities Undertaken

The most common activities undertaken during the trip were:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Glass-bottom boat	81.7%	55.8%	65.5%
Snorkelling	78.0%	80.8%	78.0%
View marine mammals	65.9%	56.7%	56.4%
Swimming	51.2%	52.9%	51.4%
Diving	22.4%	26.9%	31.3%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 to 10) were generally high, with scores of 9 and 10 accounting for 47.6% (46.1%; 46.8%) of the all responses. The mean satisfaction score was 8.54 (8.29; 8.34).

86.1% (78.8%; 81.4%) of respondents felt that they got value for money, and 86.6% (89.4%; 89.3%) said that they would recommend the trip to others.

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Staff / service / professionalism	54.8%	44.3%	48.6%

National environment	11.9%	35.2%	31.7%
Weather / sea state (sea sick)	19.0%	21.6%	30.1%
Diving / snorkelling	9.5%	17.0%	16.1%

Tourists' **best experiences** included:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Diving / snorkelling	60.5%	47.8%	54.8%
Marine life	23.3%	36.7%	26.0%
Staff / service / professionalism	14.0%	14.4%	17.3%

Tourists' **worst experiences** included:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
None	46.9%	14.1%	30.9%
Weather / sea state (sea sick)	14.3%	31.3%	35.4%

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

	Reef		Trip	
Not at all	2.5%	4.0%; 1.6%	2.6%	16.3%; 3.3%
Not very much	3.8%	4.0%; 5.8%	2.6%	5.1%; 4.0%
Somewhat	26.6%	44.6%; 38.2%	28.2%	26.5%; 32.8%
Very much	67.1%	47.5%; 54.4%	66.7%	51.0%; 59.8%

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