

REEF TOURISM QUARTERLY REPORT # 3 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 between May and July 2007. A total of 550 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 1,157 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 550 surveys were collected. 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 market is yet to be put in place, whilst randomisation and survey return issues remain to be solved.



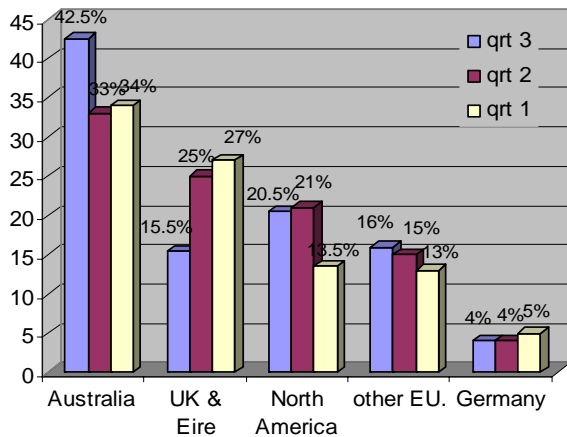
4. FINDINGS



Origin of Respondents

The sample consisted of slightly fewer males (46.5%) than females (53.5%) compared to the previous two quarters. Most respondents, 42.5%, were from Australia, of which 12% were from Queensland.

Figure 1: Origin of respondents (Quarter 3 is compared to Quarters 1 and 2).



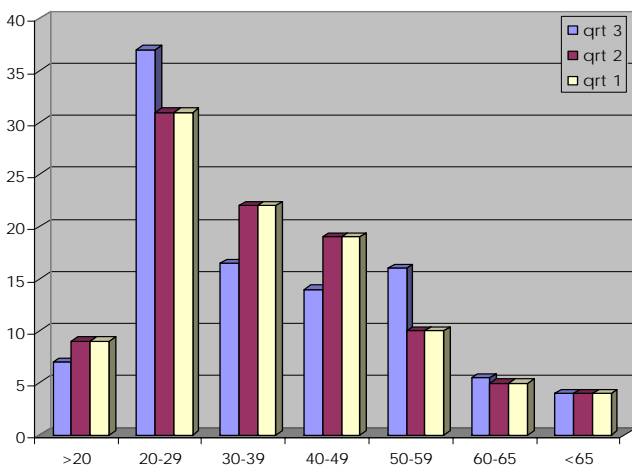
Employment

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

	Quarter 3	Quarter 2	Quarter 1
Professionals	25%	23%	27.5%
Students	21.5%	16.5%	15%
Retired	7.5%	12%	8.5%
Self-employed	5.5%	8%	10%

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were **traveling**:

	Quarter 3	Quarter 2	Quarter 1
With a partner or spouse	34.5%	36.7%	37.5%
With friends	22%	22%	13.5%
Alone	10.5%	12.5%	13.5%
With family / relatives	26.5%	11%	17.5%

Previous Visits

For 76.5% (74.5%) of respondents, this was their first visit to Far North Queensland. Of those who had visited the region before, 62% (60%) had visited once or twice before.

Accommodation and Transport

Just under a quarter of respondents (23.5%) (25%) were staying in backpackers' accommodation and another 19% (26%) in hotels, whilst holiday apartments and resorts were also popular with 27.5% of respondents staying in holiday apartments (16.5%) and 17.5% (13%) in resorts. The average length of stay was eleven nights, with 58.5% of respondents staying three to five nights. Forty-two percent of respondents (47%) flew into the region as their mode of transport, bus/coach was the next most popular mode of transport for 23.5% (22.5%) of respondents and another 26% (22%) used private or rented vehicles to reach the destination.

Previous Holiday Location

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

OVERALL RESPONDENTS (N=535)	
New Zealand	6%
USA	4%
Spain	4%
Thailand	3.5%
Gold Coast	2.5%
INTERNATIONAL RESPONDENTS (N=315)	
New Zealand	7%
Spain	6%
USA	5%
Thailand	4%
United Kingdom	3%
France	3%
DOMESTIC RESPONDENTS (N=220)	
Gold Coast	5%

Melbourne	5.4%
New Zealand	3.5%
Perth	3.5%
Tasmania	3.5%
Victoria	3.5%

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

OVERALL RESPONDENTS (N=516)		
Europe	23.5%	(34%)
Australia (except Queensland)	21%	(12%)
North America (including Caribbean)	16%	(17%)
NZ, Pacific and South-east Asia	6%	(12%)
Africa and Latin America	5%	(8.5%)
Asia	5%	(4%)
INTERNATIONAL RESPONDENTS (N=296)		
Europe	35.5%	(43%)
North America (including Caribbean)	24.5%	(21%)
NZ, Pacific and South-east Asia	16%	(11%)
Africa and Latin America	7.5%	(11.5%)
Queensland	6%	(3%)
Asia	5.5%	(4%)
Australia	5%	(4%)
DOMESTIC RESPONDENTS (N=183)		
Australia (except Queensland)	42.5%	(32%)
Queensland	23.5%	(27%)
NZ, Pacific and South-east Asia	16%	(12.5%)
Europe	8%	(10.5%)
North America (including Caribbean)	5%	(5.5%)
Asia	3%	(4%)
Africa and Latin America	2%	(3%)

Alternative Destinations Considered

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

DESTINATION	%
New Zealand	5.5%
Fiji	5.0%
Cairns	5.0%
Thailand	4.0%
Sydney	3.5%
Gold Coast	3.0%
Melbourne	3.0%
Perth	3.0%
Brisbane	3.0%

Motivations

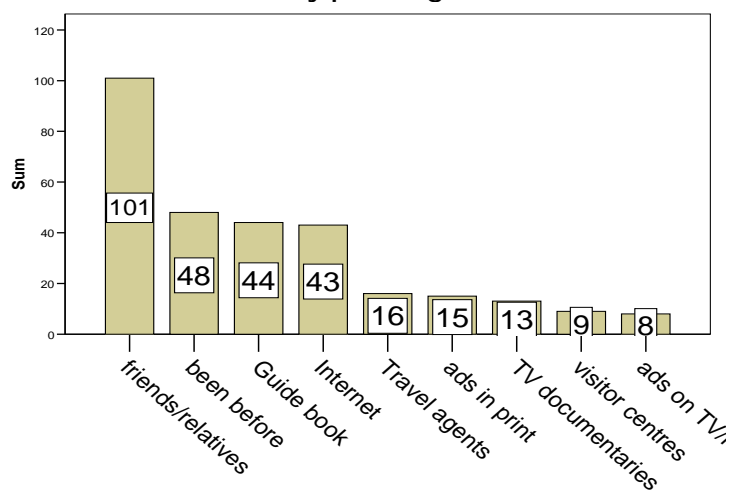
The most **important motivations** (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef..... 4.5* **(4.625)**
- Snorkelling and diving 3.89 **(4.15)**
- Rest and relaxation 4.13 **(3.825)**
- Experience the natural environment..... 3.94 **(3.8)**

*Shown as a mean.

Information Sources

Figure 3: Information sources used in holiday planning.



Previous Visits

For 44.5% (71%) of respondents, this was their first visit to the reef. Of those who had been to the reef before, 74% (64%) had been between one and four times before.

Choice of Tourism Operator

The most common reasons for **choosing their particular reef tour operator** were:

	Quarter 3	Quarter 2	Quarter 1
Recommended by agent	21%	19.2%	44.5%
Recommended by friends / relatives / other	16.5%	19%	-
Price	12.5%	13.8%	18%
Package	12.5%	8.8%	10.5%
Advertising	8.5%	7.7%	-
Availability	12.5%	7.7%	12%

Type and range of activities	10.5%	7.2%	-
Size of operation	4.5%	5.7%	-

Diving Profile

When asked if they planned to dive the reef, 35.5% (37.5%) of respondents said 'Yes'. Thirty-three percent (24.5%) of respondents had no previous diving experience; 26.3% (26%) of respondents had completed between one and four dives; 12.5% (16%) of respondents had completed between five and ten dives and 29% (32.5%) had completed more than ten dives.

Visits to Other Reefs

Just over forty-five percent (58%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was other Australian reefs, mentioned by 16.5% (17.5%) of respondents. The reefs of South-east Asia were also popular, mentioned by 16% (27%) of respondents. Another ten percent (9.5%) of respondents had been to the reefs of Micronesia. Of the respondents who had visited other reefs, 69.5% (72.5%) felt that other Australian reefs were the same or better. Seventy percent felt that South-east Asian reefs are the same or better than Australian reefs. Sixty percent of respondents felt that the reefs of Micronesia are worse than Australian reefs.

Perceptions of the Reef Trip

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

	Quarter 3	Quarter 2	Quarter 1
"A relaxing fun filled day on the reef"	44%	40%	40%
"A fantastic reef tour for all"	57%	43.5%	38.5%
"Introduction to the reef"	26%	20.5%	22%

Activities Undertaken

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

	Quarter 3	Quarter 2	Quarter 1
Snorkelling	73%	75%	75.5%
Swimming	45%	47%	44%
View marine mammals	45%	46%	24.5%
Glass-bottom boat	40%	45.5%	43%

Satisfaction Levels and Recommendations

Satisfaction ratings (measured on a scale of 1 = low satisfaction, to 10 = high satisfaction) were generally high, with scores of 9 and 10 accounting for 51.5% (49%) of all responses. The mean satisfaction score was 8.35 (8.4).

Eighty-seven percent (85%) of respondents felt that they achieved value for money, and 85.5% (91%) said they would recommend the trip to others.

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

	Quarter 3	Quarter 2	Quarter 1
Staff / service / professionalism	26%	25.6%	26%
Natural environment	13%	17%	17.5%
Weather / sea state (sea sick)	17.5%	12.7%	10%
Diving / snorkelling	8.5%	-	-
Food and beverages	4.5%	9.2%	8.5%

Tourists' **best experiences** include:

	Quarter 3	Quarter 2	Quarter 1
Diving / snorkelling	32.5%	33.3%	36%
Marine life	20%	18.5%	15%
Staff / service / professionalism	8%	8.5%	9%

Coral	2.5%	6%	11%
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Tourists' **worst experiences** include:

	Quarter 3	Quarter 2	Quarter 1
Weather / sea state (sea sick)	39%	36.2%	21%
None	31%	22.2%	-
Poor coral / no fish	2.5%	4.5%	6.7%
Uncomfortable snorkelling / diving	3%	4.1%	5%
Comfort / safety	4.5%	3.7%	5.5%

When asked if the trip met respondents' expectations, the following answers were recorded:

	Reef	Trip
Not at all	1.5% (1.5%)	1% (2.5%)
Not very much	3% (3.5%)	1.5% (3.5%)
Somewhat	5% (33%)	35% (33%)
Very much	60% (68%)	62.5% (60%)

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