

## REEF TOURISM QUARTERLY REPORT # 2 Airlie Beach February – April 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 second quarter of data collection in Airlie Beach between February and April 2007. A total of 105 surveys were returned. The results include socio-demographic characteristics, travel behaviour, alternative destinations, motivations and planning, and reef experience.

**Note:** Results from the first quarter of data collection (November 2006 – January 2007) 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 161 surveys were collected in the first quarter.



### 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 105 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



During this period, visitor numbers decreased compared to the first quarter's collection, as a result of some operators having to undertake out-of-water maintenance work on their vessels.



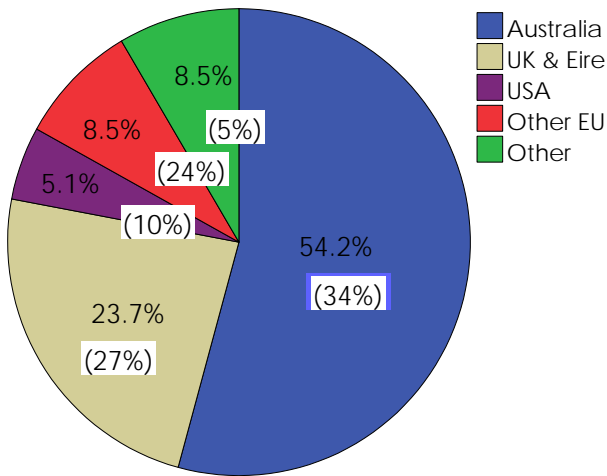
### 4. FINDINGS



#### *Origin of Respondents*

The sample consisted of a similar proportion of males (45.5%) and females (54.5%) as the first quarter. Most respondents were from Australia (60%), of which 37.5% were from Queensland.

Figure 1: Origin of respondents (first quarter figures are provided in brackets).



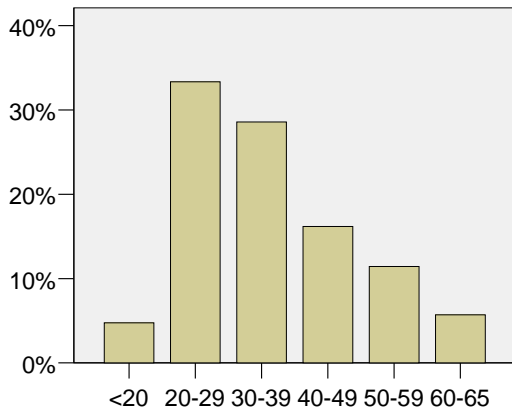
**Employment**

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

- Professionals..... 25% **(29%)**
- Students..... 15% **(16%)**
- Self-employed ..... 7% **(10%)**

**Age of Respondents**

Figure 2: Age of respondents.



**Travel Party**

The majority of respondents were travelling:

- With a partner or spouse ..... 42% **(44%)**
- With their family/relatives ..... 25% **(14.5%)**
- With friends ..... 20% **(12.5%)**

**Previous Visits**

For 74.5% **(80%)** of respondents, this was their first visit to Far North Queensland. Of those who had visited the region previously, most (89%) had visited the region more than once before.

**Accommodation and Transport**

Most respondents, 18.5%, **(33%)** were staying in backpackers' accommodation and another 19% were staying in hotels **(20%)**, whilst staying in a caravan park was also popular with 15.5% **(14.5%)** of respondents choosing that option. A third of respondents, 35.5% **(30%)** flew into the region as their mode of transport. The bus/coach was the next most popular transportation for 20% **(25%)** of respondents and another 29.5% **(33%)** used private vehicles or rented cars to reach their destination.

**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=99)       |      |
|----------------------------------|------|
| New Zealand                      | 4%   |
| Gold Coast                       | 4%   |
| Fiji                             | 3%   |
| Sydney                           | 3%   |
| INTERNATIONAL RESPONDENTS (N=39) |      |
| France                           | 12%  |
| New Zealand                      | 12%  |
| Sydney                           | 5%   |
| DOMESTIC RESPONDENTS (N=60)      |      |
| Gold Coast                       | 6.3% |
| Fiji                             | 4.5% |
| Tamania                          | 4.5% |
| Thailand                         | 4.5% |

A thematic/regional analysis shows the following trends:

| OVERALL RESPONDENTS (N=990)         |                  |
|-------------------------------------|------------------|
| Australia (except Queensland)       | 35% <b>(12%)</b> |
| Europe                              | 20% <b>(41%)</b> |
| Queensland                          | 16% <b>(13%)</b> |
| NZ, Pacific and South-east Asia     | 14% <b>(10%)</b> |
| Africa and Latin America            | 9% <b>(9%)</b>   |
| Asia                                | 8% <b>(3%)</b>   |
| North America (including Carribean) | 8% <b>(12%)</b>  |
| INTERNATIONAL RESPONDENTS (N=39)    |                  |
| Europe                              | 30% <b>(56%)</b> |

|                                     |      |         |
|-------------------------------------|------|---------|
| NZ, Pacific and South-east Asia     | 18%  | (7%)    |
| Africa and Latin America            | 14%  | (12%)   |
| North America (including Caribbean) | 14%  | (18%)   |
| Australia                           | 10%  | (1%)    |
| Asia                                | 6%   | (2%)    |
| Queensland                          | 8%   | (4%)    |
| DOMESTIC RESPONDENTS (N=60)         |      |         |
| Australia (except Queensland)       | 50%  | (28%)   |
| Queensland                          | 20%  | (26.5%) |
| NZ, Pacific and South-east Asia     | 8.5% | (14%)   |
| Europe                              | 8.5% | (10.5%) |
| Asia                                | 8.5% | (3%)    |
| Africa and Latin America            | 3%   | (3%)    |
| North America (including Caribbean) | 1.5% | (3%)    |

### Alternative Destinations Considered

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

- Cairns.....10%
- New Zealand.....7%
- Fiji.....6.5%
- Melbourne .....4.5%
- Sydney .....4.5%

### Motivations

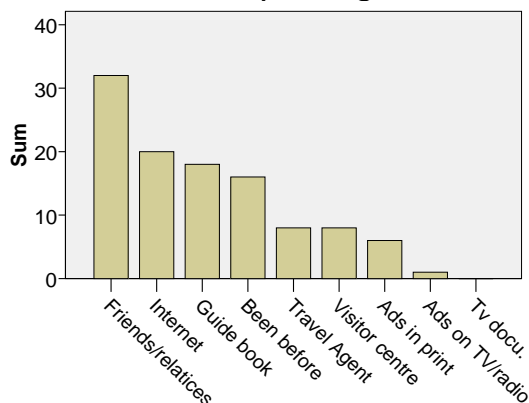
The most important motivations (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef ..... 4.5%\* **(4.5%)**
- Snorkelling and diving..... 4.2% **(4.25%)**
- Rest and relax..... 4.2% **(4%)**
- Visit the islands ..... 4% **(4%)**

\* Shown as a mean.

### Information Sources

Figure 3: Information sources used in planning.



### Previous Visits to the Reef

For 61% (**69%**) of respondents, this was their first visit to the reef. Of those who had been to the reef before, 12.5% (**72%**) had been between one and four times before.

### Choice of Tour Operator

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

- Price ..... 16.5% **(20%)**
- Advertising ..... 11.5% **(8.5%)**
- Recommended by others ..... 10.5%
- Availability ..... 8% **(4.5%)**
- Package tour..... 7% **(13.5%)**

### Diving Profile

When asked if they planned to dive the reef, 41% (**28%**) of respondents said "Yes". 36% of respondents had no previous diving experience; 22% of respondents had completed between one and four dives; and 14% had completed between five and ten dives. A total of 23% of respondents had completed more than ten dives.

### Visits to Other Reefs

Over 39% (**41%**) 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 13% (**15%**) of respondents\*. Other frequently visited reefs included the South Pacific and South-east Asian Reefs, each mentioned by 8.5% of respondents (**8% and 12.5% respectively**). Another 7% (**15%**) of respondents had been to the reefs of the Caribbean. 85% (**80%**) of respondents felt that other Australian reefs were the same or better than the Great Barrier Reef; 90% (**90%**) of respondents felt that the reefs of the South Pacific are the same or better; and 60% (**55.5%**) of respondents felt that South-east Asian reefs are the same or better.

\* 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:

- “A relaxing, fun-filled day on the reef” ..... 53.5% (**51%**)
- “A fantastic reef tour for all” ..... 37% (**33%**)
- “An introduction to the reef” .. 24% (**21.5%**)

### Activities Undertaken

The most common activities undertaken during the trip were:

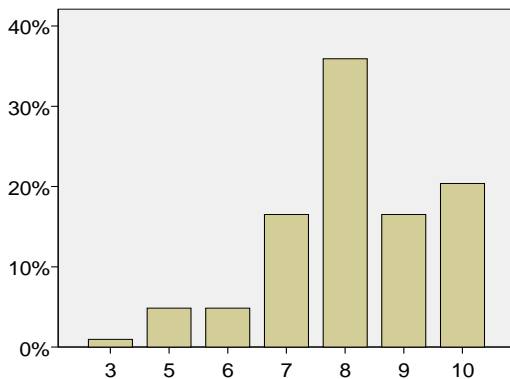
- Glass-bottom boat ..... 82% (**48%**)
- Snorkelling ..... 76% (**86%**)
- View marine animals..... 69.5% (**30%**)
- Swimming..... 52.5% (**53.5%**)
- Diving..... 20.5% (**17.5%**)

### 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 55.5% (**46%**) of all responses, and the mean satisfaction score was 8.12 (**8.2**).

Eighty percent (87%) of respondents felt that they achieved value for money, and 90.5% (90%) said they would recommend the trip to other travellers.

Figure 4: Satisfaction scores.



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

- Staff/service/professionalism ..... 33% (**38%**)
- Natural environment ..... 25% (**32%**)
- Food and beverages..... 20% (**14%**)
- Weather / sea state (sea sick) ... 13% (**28%**)
- Facilities/boat..... 9.5% (**10%**)

Tourists' **best experiences** included:

- Diving/snorkelling ..... 29.5% (**31.5%**)
- Marine life..... 28% (**7%**)
- Food and beverages ..... 10% (**8.5%**)
- Staff/service/professionalism..... 6.5% (**10%**)

Tourists' **worst experiences** included:

- Weather / sea state (sea sick) ... 36% (**32%**)
- None ..... 11.5%
- Food and beverages ..... 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    | 4% ( <b>2.5%</b> )   | 4% ( <b>10.5%</b> )  |
| Not very much | 5% ( <b>6.5%</b> )   | 6% ( <b>5.5%</b> )   |
| Somewhat      | 43% ( <b>36.5%</b> ) | 32% ( <b>31.5%</b> ) |
| Very much     | 48% ( <b>54.5%</b> ) | 53% ( <b>52%</b> )   |

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