

REEF TOURISM QUARTERLY REPORT # 2 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 between February and April 2007. A total of 580 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 677 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 580 surveys were collected. Data is collected on reef visitors' socio-demographic characteristics, as well as travel patterns, motivations, activities, alternative destinations con-

sidered, satisfaction (including expectations and best and worst experiences).



3. LIMITATIONS



Visitor numbers decreased from the previous quarter resulting in a smaller sample, as a result of some operators undertaking out-of-water maintenance work on vessels.



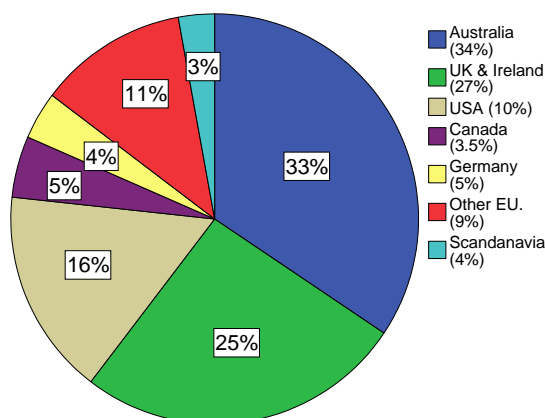
4. FINDINGS



Origin of Respondents

The sample consisted of a similar proportion of males (49%) and females (51%) as the previous quarter. Most respondents were from Australia (33%), of which 44% were from Queensland.

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



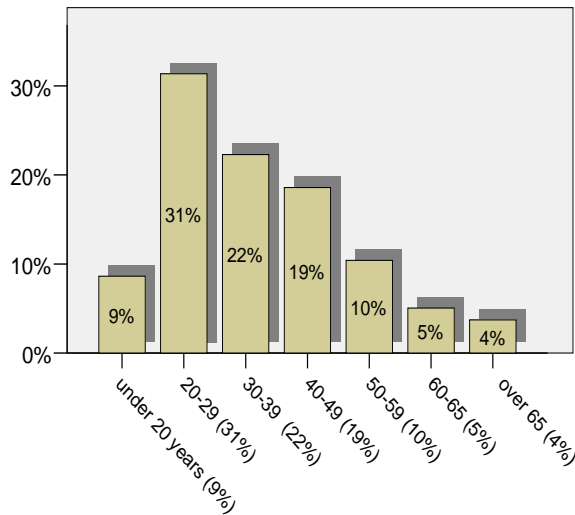
Employment

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

- Professionals..... 23% **(27.5%)**
- Students..... 16.5% **(15%)**
- Retired 12% **(8.5%)**
- Self-employed 8% **(10%)**

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were **traveling**:

- With a partner or spouse 36.7% **(37.5%)**
- With friends 22% **(13.5%)**
- Alone 12.5% **(13.5%)**
- With family / relatives 11% **(17.5%)**

Previous Visits

For 79% **(70%)** of respondents, this was their first visit to Far North Queensland. Of those who had visited the region before, just over half, 55% **(66%)** had visited once or twice before.

Accommodation and Transport

A quarter of respondents **(25%)** were staying in backpackers' accommodation and another 27% **(25%)** in hotels, whilst holiday apartments and resorts were also popular with 19% of respondents staying in holiday apartments **(14%)** and 10% **(16.5%)** in resorts. The average length of stay was ten nights, with 50% of respondents staying three to five nights. Nearly half the respondents, 46.5% **(47%)** flew into the region as their mode of transport, the bus/coach was the next most popular

transportation for 23.5% **(21.5%)** of respondents and another 19% **(25%)** used private vehicles or rented cars 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=554)	
New Zealand	5.4%
France	4.3%
Thailand	4.3%
Spain	4.2%
Gold Coast	2.7%
USA	2.7%
Hawaii	2.2%
Sydney	2.2%
Canada	2.0%
INTERNATIONAL RESPONDENTS (N=371)	
New Zealand	7.3%
Spain	6.2%
France	5.4%
Thailand	3.8%
USA	3.5%
Hawaii	2.7%
DOMESTIC RESPONDENTS (N=183)	
Gold Coast	7.7%
Thailand	5.5%
Sydney	4.4%
Brisbane	3.3%
Melbourne	3.3%
Fiji	2.7%
Tasmania	2.7%

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

OVERALL RESPONDENTS (N=554)	
Europe	28.5% (34%)
North America (including Caribbean)	16% (14%)
Australia (except Queensland)	15% (13%)
NZ, Pacific and South-east Asia	13% (11%)
Queensland	11% (12%)
Africa and Latin America	8% (8.5%)
Asia	5% (3%)
INTERNATIONAL RESPONDENTS (N=371)	
Europe	38% (45%)
North America (including Caribbean)	20.5% (19%)
NZ, Pacific and South-east Asia	14% (10%)
Africa and Latin America	10.5% (12%)
Australia	5.5% (4%)

Asia	4.5%	(3.5%)
Queensland	3.5%	(3%)
DOMESTIC RESPONDENTS (N=183)		
Australia (except Queensland)	34.6%	(29%)
Queensland	25.4%	(30%)
NZ, Pacific and South-east Asia	12%	(13%)
Europe	9%	(12%)
North America (including Caribbean)	6.5%	(4.5%)
Asia	6%	(2.5%)
Africa and Latin America	4%	(2%)

Alternative Destinations Considered

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

DESTINATION	%
New Zealand	7.8%
Sydney	6.0%
Melbourne	3.9%
Whitsundays	3.3%
Cairns	3.2%
USA	2.6%
Brisbane	2.5%
Perth	2.3%
Thailand	2.3%

Motivations

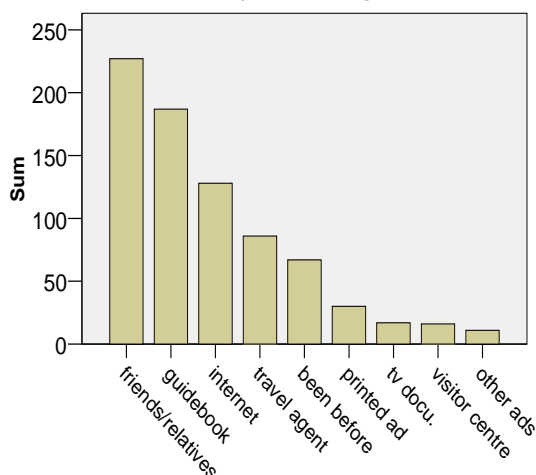
The most **important motivations** (measured on a scale of 1 = not at all important, to 5 = very important) for visiting the region include:

- Visit the Great Barrier Reef 4.6* **(4.65)**
- Snorkelling and diving 4.14 **(4.15)**
- Rest and relaxation 3.85 **(3.8)**
- Experience the natural environment 3.85 **(3.75)**

*Shown as a mean.

Information Sources

Figure 3: Information sources used in holiday planning.



Previous Visits

For 73% **(70%)** of respondents, this was their **first visit to the reef**. Of those who had been to the reef before, 78% **(50%)** had been between one and four times before.

Choice of Tourism Operator

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

- Recommended by agent 19.2%
- Recommended by friend or relative, or other 19% **(44.5%)**
- Price 13.8% **(18%)**
- Package 8.8% **(10.5%)**
- Advertising 7.7%
- Availability 7.7% **(12%)**
- Type and range of activities 7.2%
- Size of operation 5.7%

Diving Profile

When asked if they planned to dive the reef, 39% **(36%)** of respondents said 'Yes'. Twenty-one percent **(27.5%)** of respondents had no previous diving experience; 24.3% **(28%)** of respondents had completed between one and four dives; 16.6% **(16%)** of respondents had completed between five and ten dives and 37.6% **(28.5%)** had completed more than ten dives.

Visits to Other Reefs

Over 73% **(44%)** of the respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative destination was the Caribbean, mentioned by 30.5% **(15.5%)** of respondents, or other Australian reefs, mentioned by 20% **(15%)** of respondents, who sometimes mistook them for other reefs on the Great Barrier Reef. Another 19.5% **(9.5%)** of respondents had been to the reefs of Hawaii. Seventy-five percent **(70%)** of respondents felt that other Australian reefs were the same or better than the Great Barrier Reef; 53% **(50%)** felt that Hawaiian reefs are the same or better; and 53% **(49%)** felt that Caribbean reefs were the same or better.

Perceptions of the Reef Trip

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

- "A relaxing, fun filled day on the reef" 40% **(40%)**
- "A fantastic reef tour for all" 43.5% **(38.5%)**
- "Introduction to the reef" 20.5% **(22%)**

Activities Undertaken

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

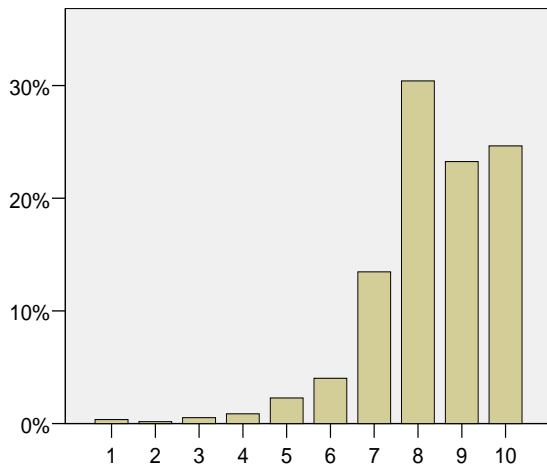
- Snorkelling 75% **(75.5%)**
- Swimming 47% **(44%)**
- View marine animals 46% **(24.5%)**
- Glass-bottom boat 45.5% **(43%)**

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 48% **(50.5%)** of all responses. The mean satisfaction score was 8.35 **(8.4)**.

Eighty-four percent **(86%)** of respondents felt that they achieved **value for money**, and 92% **(90%)** said they would **recommend the trip** to others.

Figure 4: Satisfaction scores.



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

- Staff/service/professionalism .. 25.6% **(26%)**
- Natural environment 17.0% **(17.5%)**
- Weather / sea state 12.7% **(10%)**
- Food and beverages 9.2% **(8.5%)**

Tourists' **best experiences** include:

- Diving / snorkelling 33.3% **(36%)**
- Marine life 18.5% **(15%)**
- Staff / service / professionalism... 8.5% **(9%)**
- Coral 6% **(11%)**

Tourists' **worst experiences** include:

- Weather / sea state 36.2% **(21%)**
- None 22.2%
- Poor coral / no fish 4.5% **(6.7%)**
- Uncomfortable snorkelling / diving 4.1% **(5%)**
- Comfort / safety 3.7% **(5.5%)**

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

	Reef	Trip
Not at all	2% (1.5%)	2% (3%)
Not very much	4.5% (3%)	4% (3.5%)
Somewhat	36% (31%)	35% (28.5%)
Very much	75.5% (60%)	59% (60%)

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