

**REEF TOURISM
QUARTERLY REPORT # 2
Townsville
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 the Townsville region between February and April 2007. A total of 54 surveys were returned, all from March. 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 101 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 54 surveys were collected. Data is collected on reef visitors' socio-demographic characteristics, as well as travel patterns, motivations, activities, alternative destinations considered, and satisfaction (including expectations and best and worst experiences).

 **3. LIMITATIONS** 

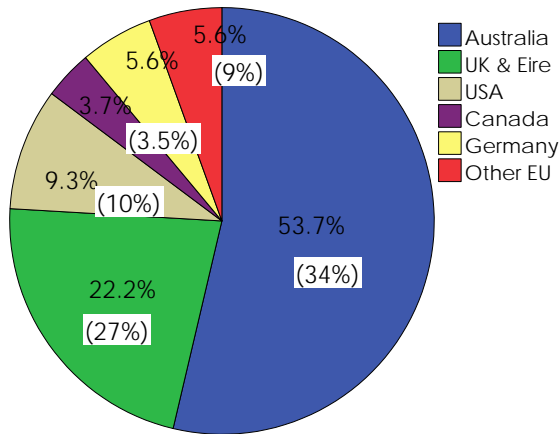
Visitor numbers decreased from the last quarterly report as a result of some operators undertaking out-of-water maintenance work on their vessels.

 **4. FINDINGS** 

Origin of Respondents

The sample consisted of a similar proportion of males (41%) and females (59%) as the last quarter. Most respondents were from Australia (24.5%), of which 37.5% were from Queensland.

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



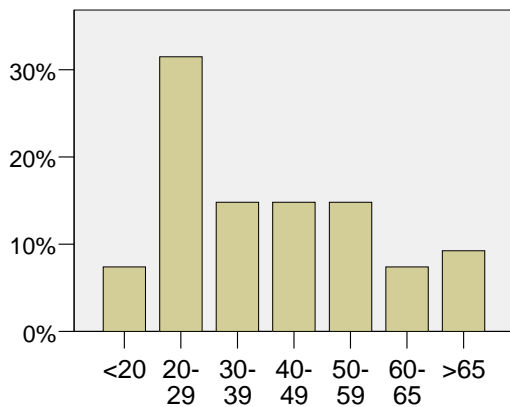
Employment

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

- Professionals..... 26% **(22.5%)**
- Students..... 18.5% **(16%)**
- Retired 13% **(5%)**

Age of Respondents

Figure 2: Age of respondents.



Travel Party

The majority of respondents were **traveling**:

- With a partner or spouse 35% **(26%)**
- With friends 20.5% **(13%)**
- Alone 7.5% **(7%)**
- With family / relatives 11% **(52%)**

Previous Visits

For 55.5% (36%) of respondents, this was their first **visit to Far North Queensland**. Of those who had visited the region previously, 92% had visited the region more than once before.

Accommodation and Transport

Staying with friends and relatives was the most popular choice of accommodation, with 20.5% of respondents choosing that option. Another 16.7% were staying in hotels **(14.5%)**, whilst only a few respondents, 3.5% **(14.5%)**, stayed at resorts. One-third of respondents, 33% **(40%)** flew into the region as their mode of transport. Private or rented vehicles were the next most popular transportation for 28% **(33%)** of respondents, and another 13% used the bus/coach to reach their 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=53)	
New Zealand	11%
USA	4%
Gold Coast	4%
INTERNATIONAL RESPONDENTS (N=24)	
New Zealand	24%
Malta	8%
USA	8%
DOMESTIC RESPONDENTS (N=29)	
Gold Coast	14%
USA	7%
Townsville	7%
Sunshine Coast	7%
Sydney	7%

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

OVERALL RESPONDENTS (N=53)		
Queensland	31%	(23%)
Europe	19%	(18%)
North America (including Carribean)	11%	(8%)
NZ, Pacific and South-east Asia	19%	(9%)
Australia, except Queensland	16%	(25%)
Africa and Latin America	2%	(5%)
Asia	2%	(5%)
DOMESTIC RESPONDENTS (N=29)		
Australia, except Queensland	19%	(37%)
Queensland	51%	(31%)

NZ, Pacific and South-east Asia	7%	(7.7%)
Europe	4%	(11%)
North America (including Carribean)	11%	(4.6%)
Asia	4%	(1.5%)
Africa and Latin America	4%	(2%)
INTERNATIONAL RESPONDENTS (N=24)		
Europe	38%	(32%)
NZ, Pacific and South-east Asia	30%	(12%)
North America (including Carribean)	14%	(15%)
Australia	14%	(3%)
Queensland	4%	(9%)
Africa and Latin America	0%	(15%)
Asia	0%	(12%)

Alteranative Destinations Considered

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

Destination	%
Cairns	5%
Fraser Island	5%
Sydney	4.5%
Brisbane	3.5%
Great Keppel Island	3.5%

Motivations

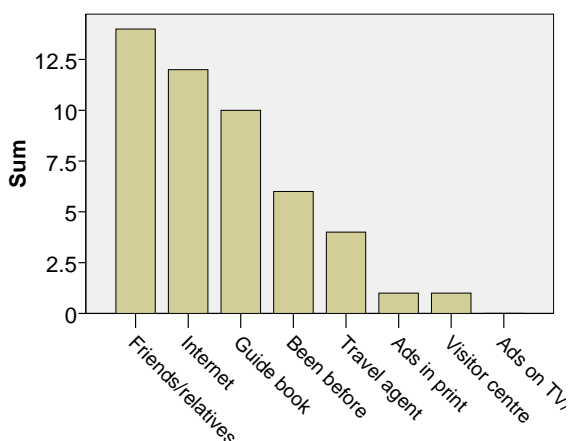
The most **important motivations** for visiting the region (ranked on a scale of 1 to 5, with 5 being most important) include:

- Visit the GBR..... 4.4* (4.3)
- Snorkelling and diving..... 4.1 (4.1)
- Rest and relaxation 3.8 (3.9)
- Experience the natural environment 3.8 (3.75)

*Shown as a mean.

Information Sources

Figure 3: Information sources used for holiday planning.



Previous Visits

For 70.5% (**61%**) of respondents, this was their **first visit to the reef**. Of those who had been to the reef before, 60% (**25%**) had been between one and four times before.

Choice of Tour Operator

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

- Availability 35.5% (**33.5%**)
- Price 20% (**12.5%**)
- Recommended by travel agent (14.7%) or others (17.5%) (**28.5%**)
- Advertising 6.5% (**10.5%**)

Diving Profile

When visitors were asked if they **planned to dive** the reef, 18.5% (**22%**) of respondents said 'Yes'. Twenty-five percent (**35%**) of respondents had no previous diving experience; 37.5% (**50%**) of respondents had completed between one and four dives previously; 25% (**0%**) had completed between five and ten dives previously; and 25% (**15%**) had completed more than ten dives.

Visit to Other Reefs

Over 39% (**44%**) 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 11% (**28%**) of respondents*, followed by the Caribbean, mentioned by 5% (**15.5%**) of respondents. Another 5% (**8.5%**) of respondents had been to the reefs of the South Pacific. Ninety percent (**70%**) of respondents felt that other Australian reefs were the same or better than the Great Barrier Reef; 70% (**49%**) felt that Caribbean reefs were the same or better; and 50% (**57%**) felt that the reefs of South Pacific 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" 59.5% (**42.5%**)
- "A fantastic reef tour for all" ... 39% (**51.5%**)
- "Introduction to the reef" 15% (**19%**)

Activities Undertaken

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

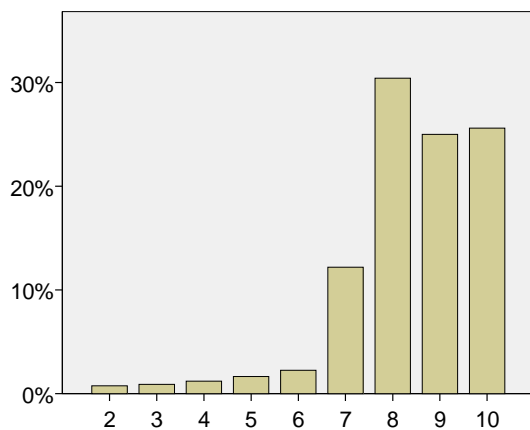
- Snorkelling 87% (**75.5%**)
- Glass-bottom boat 70.5% (**43%**)
- Swimming 42.5% (**44%**)
- Viewing marine animals 32% (**24.5%**)
- Diving 15% (**17%**)

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 47% (**51%**) of all responses. The mean satisfaction score was 8.4 (**8.4**).

Ninety percent (86%) of respondents felt that they achieved **value for money**, and 95% (**87%**) said they would **recommend the trip** to others.

Figure 4: Satisfaction scores.



The first four factors that influenced the satisfaction (either positively or negatively) most frequently include:

- Natural environment 20% (**23.5%**)
- Food and beverages 17% (**10%**)
- Facilities / boat 14.5% (**3.5%**)
- Staff/service/professionalism 8.5% (**30%**)

Tourists' **best experiences** include:

- Diving / snorkelling 40.5% (**41%**)
- Marine life 12% (**9%**)
- Food and beverages 10.5% (**9%**)
- Staff/service/professionalism 5% (**8%**)

Tourists' **worst experiences** include:

- None 30.5%
- Weather / sea state 19% (**20%**)
- Poor coral / no fish 11.5% (**14%**)

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

	Reef	Trip
Not at all	0% (2%)	2% (2%)
Not very much	10% (1%)	44% (1%)
Somewhat	44% (40%)	0% (40%)
Very much	46% (52%)	54% (59%)

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