

REEF TOURISM QUARTERLY REPORT 5 Townsville 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 = 50); the results from the same quarter in the first year of data collection (N = 81); and the overall results for the period between November 2006 and March 2008 (N = 375). 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 Great Barrier Reef (GBR) to enable the identification of key trends and drivers of visitor patterns. Results are presented quarterly.

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



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 fifty surveys were collected in the first quarter of Year 2.



3. LIMITATIONS



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



4. FINDINGS



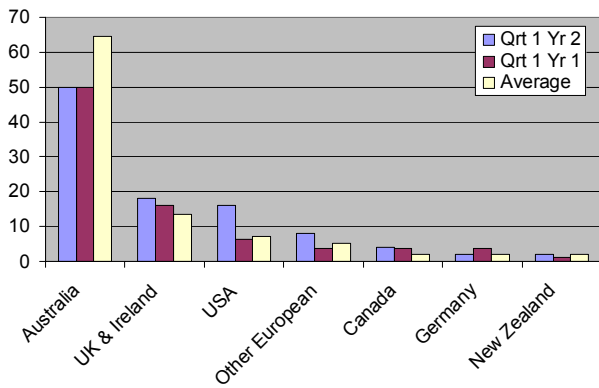
Origin and Gender of Respondents

This quarter's sample did not vary much from the usual pattern of almost equal number of men, 34.0% (38.3%;¹ 41.6%;²) and women, 66.0% (61.7%; 58.4%). Half of the respondents, 50% (61.7%; 64.5%), were from Australia, of which 12.0% were from Queensland (Figure 1).

¹ Quarter 1, Year 1.

² Overall sample.

Figure 1: Origin of respondents.



Employment

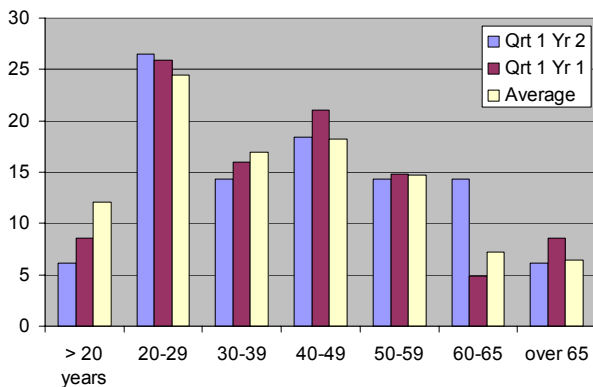
In terms of **employment**, the most common responses were (as a percentage of the total):

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Professionals	22.9%	23.8%	24.0%
Students	16.0%	17.5%	16.2%
Public Service	2.5%	15.0%	10.2%
Self-employed	8.3%	7.5%	7.3%

Age of Respondents

The **age of respondents** was more evenly distributed in this area of the Great Barrier Reef with many respondents in the 40-59 age group (Figure 2).

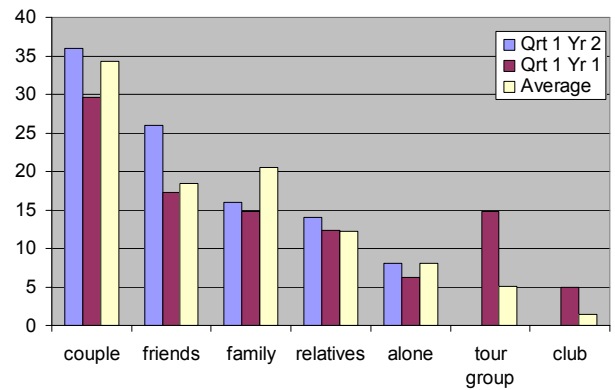
Figure 2: Age of respondents (percentage).



Travel Party

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

Figure 3: Respondents' travel party (%).



Previous Visits and Length of Stay

For 73.3% (46.3%; 49.2%) of respondents, this was their first visit to the region. The average length of stay was two nights (2-5; 2-7).

Accommodation and Transport

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

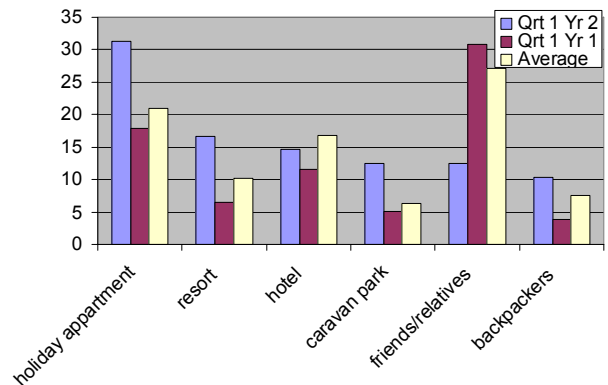
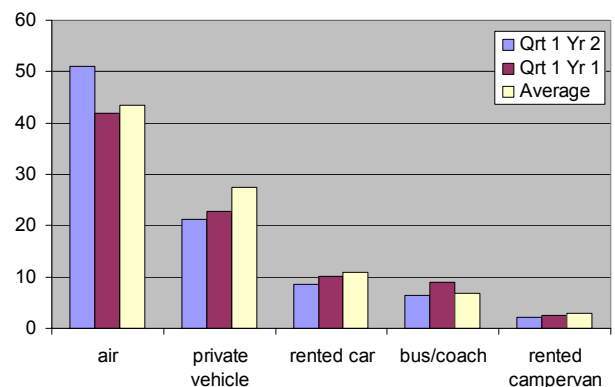


Figure 5: Respondents' choice of transport (%).



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=50)	
Europe	11.5%
United Kingdom	10.0%
Gold Coast	6.0%
USA	6.0%
INTERNATIONAL RESPONDENTS (N=27)	
United Kingdom	8.0%
USA	4.0%
DOMESTIC RESPONDENTS (N=23)	
Gold Coast	4.0%
Airlie Beach	4.0%

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

OVERALL RESPONDENTS (N=50)	
Europe	28.6%
Australia, excluding Queensland	20.4%
Queensland	18.4%
NZ, Pacific & South-east Asia	8.2%
North America, including Caribbean	14.3%
Asia	6.1%
Africa and Latin America	4.1%
INTERNATIONAL RESPONDENTS (N=27)	
Europe	50.0%
North America, including Caribbean	25.0%
NZ, Pacific & South-east Asia	4.2%
Africa and Latin America	8.3%
Queensland	8.3%
Asia	4.2%
DOMESTIC RESPONDENTS (N=23)	
Australia, excluding Queensland	40.0%
Queensland	28.0%
NZ, Pacific & South-east Asia	12.0%
Europe	8.0%
North America, including Caribbean	4.0%
Asia	8.0%

Alternative Destinations Considered

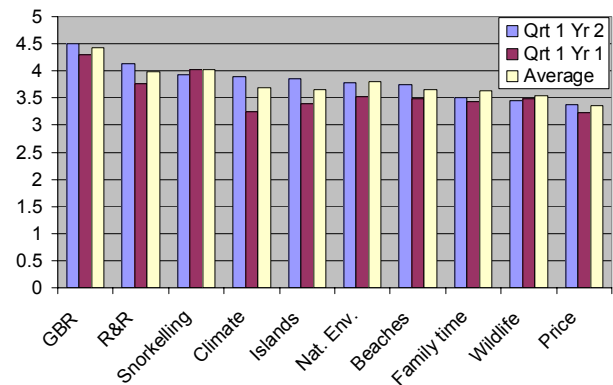
The most popular **alternative destinations** considered when planning this trip were:

Destination	
None	10.05%
Cairns	8.98%
New Zealand	3.95%
Gold Coast	3.59%
Sydney	3.41%
Melbourne	3.23%
Airlie Beach	3.05%
Brisbane	3.05%

Motivations

The most **important motivations** for visiting the region (ranked on a scale of 1 to 5, with 5 being most important) include seeing the Great Barrier Reef, rest and relaxation, and snorkelling (Figure 6).

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



Information Sources

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Guidebook	27.1%	12.9%	18.1%
Internet	14.9%	16.0%	13.8%
Friends and Relatives	51.0%	35.8%	42.5%
TV Documentary	6.3%	0.0%	1.9%
Travel Agents	4.2%	4.9%	3.5%

Previous Visits

For 72.0% (67.5%; 64.6%) of respondents, this was their first visit to the reef.

Choice of Tour Operator

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Recommended by travel agent	4.0%	3.1%	8.2%
Recommended by friend or relative, or other	6.0%	17.5%	14.7%
Price	6.0%	14.1%	10.6%
Advertising	14.0%	12.5%	13.8%
Availability	28.0%	35.0%	30.0%

Diving Profile

When asked if they planned to dive the reef, 25.0% (16.7%; 20.8%) of respondents said yes. 58.3% (20.0%; 40.7%) of these respondents had no previous diving experience, 16.7% (5.0%; 32.2%) had one to four dives, 0.0%(2.5%; 6.8%) had five to 10 dives and only 24.0% (20.0%; 20.3%) had more than ten dives.

Visit to Other Reefs

Over 42.9% (41.0%; 42.0%) of respondents said they had visited other coral reefs before coming to the Great Barrier Reef. The most commonly cited alternative reef destination was South-east Asia 12.0% (11.1%; 26.8%), the Indian Ocean 8.0% (4.9%; 7.7%), Micronesia 4.0% (6.2%; 5.6%) and the South Pacific 4.0% (8.6%; 7.7%).

Activities Undertaken

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

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Snorkelling	86.0%	88.8%	79.7%
Swimming	52.0%	42.5%	51.9%
View marine mammals	49.0%	28.8%	36.8%
Diving	18.0%	12.2%	23.3%
Glass-bottom boat	34.0%	67.9%	57.6%

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 49.2% (46.9%; 55.8%) of all responses. The mean satisfaction score was 8.41 (8.39; 8.58).

91.81% (90.7%; 89.6%) of respondents felt they achieved value for money, and 50.0% (90.0%; 85.6%) said 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%	47.5%	61.4%

Natural environment	11.9%	47.5%	38.0%
Weather / sea state	19.0%	14.8%	25.1%
Diving / snorkelling	9.5%	18.0%	21.6%

Tourists' **best experiences** include:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Diving / snorkelling	60.5%	56.5%	59.9%
Marine life	23.3%	24.2%	26.6%
Staff / service / professionalism	14.0%	9.7%	18.1%

Tourists' **worst experiences** include:

	Quarter 1, Year 2	Quarter 1, Year 1	Overall
Weather / sea state (sea sick)	14.36%	17.7%	19.7%
None	46.9%	32.3%	41.3%

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

	Reef		Trip	
Not at all	2.0%	0.0%; 0.8%;	0.0%	1.4%; 1.4%
Not very much	6.0%	6.6%; 3.3%	2.0%	0.0%; 1.4%
Somewhat	38.0%	47.4%; 34.0%	30.6%	43.2%; 29.8%
Very much	54.0%	44.7%; 61.9%	67.3%	54.1%; 68.4%

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