

# Recreational Dive and Snorkel Market

YE March 2007



## Queensland Recreational Dive and Snorkel Market

The following report provides a snapshot of the Queensland international and domestic recreational dive and snorkel market between 01 April 2006 and 30 March 2007.

For the purposes of this report a Recreational Diver and/or Snorkel (RDS) visitor has been defined as "a short term (no more than 365 days) visitor, aged 15 years or more who stated that they undertook SCUBA diving and/or snorkelling activities during their trip to Queensland"



Any statistically significant differences (or "real" differences, those not merely due to random chance) between the dive and the snorkel markets have been noted with a blue circle. For the purpose of this report the Great Barrier Reef (GBR) has been defined as the following statistical local areas: Fitzroy, Mackay, Whitsundays, Northern and Tropical North Queensland. Caution is advised when interpreting results for the domestic RDS market due to the small sample size.

Source: International and National Visitor Surveys, Tourism Research Australia, Year Ending March 2007

## Highlights of the recreational dive and snorkel market

The waters of Queensland offer some of the best underwater adventures on earth. The azure seas, tropical islands and warm inviting waters are home to a colourful kaleidoscope of reefs, shoals, coral cays and mysterious shipwrecks teeming with exotic tropical marine life. With over 5,200 kilometres of mainland coastline, mild climate, clear visibility and the world's only natural underwater wonder, the Great Barrier Reef, Queensland is a popular destination for snorkelling and diving.

Queensland hosted almost 3.5 million dives and snorkels in the 12 months to March 2007.

Queensland	Visitors	Visitor Nights in Australia	Total number of dives/snorkels
RDS Total*	1 231 000	32 224 000	3 472 000
Dive	345 000	12 679 000	1 198 000
Snorkel	1 118 000	30 074 000	2 274 000

Great Barrier Reef	Visitors	Visitor Nights in Australia	Total number of dives/snorkels
RDS Total*	1 039 000	29 247 000	3 073 000
Dive	301 000	11 671 000	1 087 000
Snorkel	952 000	27 072 000	1 986 000

\* Note Dive and Snorkel do not add to RDS Total as some visitors participated in both

Over 1.2 million international and domestic overnight visitors participated in Recreational Diving and/or Snorkelling (RDS). This equates to 6% of all overnight visitors to Queensland. Approximately one million of the RDS market went diving or snorkelling on the Great Barrier Reef (GBR).

International visitors represented just over half (or 623,000) of the overall RDS market to Queensland. In general they came from the UK, Japan or the USA, were under 35 years of age and travelled either alone or as a couple. Domestic visitors represented slightly under half (or 608,000) of the total RDS market. Typically this market came from Queensland or New South Wales and were under 35 years.

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## International Market

Source: International Visitor Survey, Tourism Research Australia, Year Ending March 2007

In the year ending March 2007 Queensland received 2.2 million international visitors who stayed an average 31 nights in Australia. Of these visitors 28% (or 623,000) participated in RDS during their stay.

During this time the GBR received 1 million international visitors who stayed an average of 37 nights in Australia. Of these visitors 61% (or 585,000) participated in RDS during their stay.

Queensland	Visitors	Visitor Nights in Australia	Total number of dives/snorkels
RDS Total*	623 000	27 746 000	1 916 000
Dive	202 000	11 900 000	750 000
Snorkel	567 000	25 797 000	1 166 000
Great Barrier Reef	Visitors	Visitor Nights in Australia	Total number of dives/snorkels
RDS Total*	585 000	25 397 000	1 806 000
Dive	190 000	11 026 000	706,000
Snorkel	536 000	23 779 000	1 100 000

Of the international RDS market to Queensland, 23% participated in both snorkelling and diving activities, 68% only went snorkelling and 9% only went diving. Of the international RDS market to the GBR, 24% undertook both snorkelling and diving activities, 68% only went snorkelling and 8% only went diving.

On average, the international RDS market spends \$88 per day on their trip, with snorkellers likely to spend more per day than divers (\$89 compared with \$84).

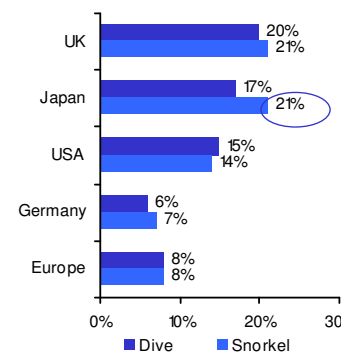
The vast majority of the RDS market were on a holiday (80%) in Australia, 7% were visiting friends or relatives and 6% were travelling for educational purposes.

\* Note Dive and Snorkel do not add to RDS Total as some visitors participated in both

More than half of the international RDS market were from three countries: the UK, Japan and the USA. The majority were under 35 years of age and travelled alone or as a couple.

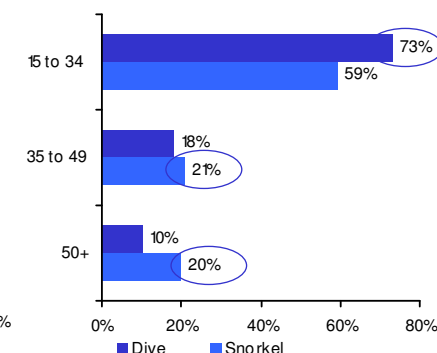
Compared with divers, snorkellers were more likely to come from Japan and travel as an adult couple or as a family. Divers were more likely to be younger (under 35 years) and travelling alone than snorkellers.

### Where were they from?

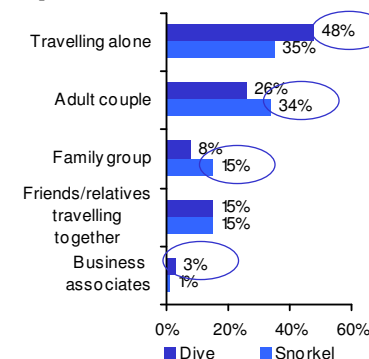


Europe excludes the UK and Germany

### How old were they?



### Who did they travel with?



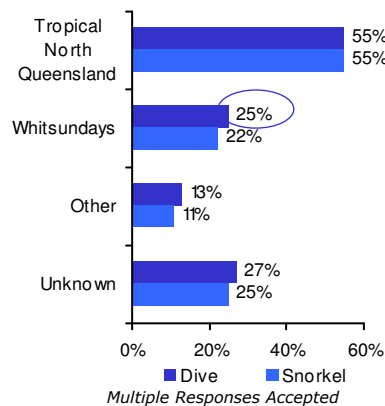
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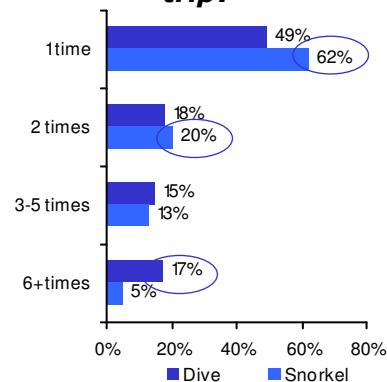


The majority of snorkellers had limited previous experience, most having participated less than three times before this trip. The bulk of visitors went snorkelling once during their trip, via an organised activity undertaken from a boat. Comparatively, snorkellers were less likely to take part in an organised activity or to launch from a boat than divers. The most popular snorkel locations in Queensland were Tropical North Queensland and the Whitsundays.

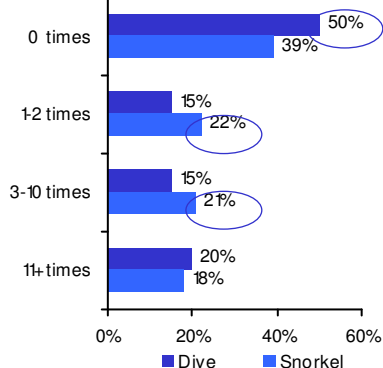
## Where did they participate?



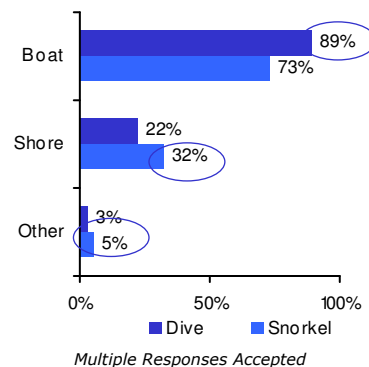
## How many times did they participate on this trip?



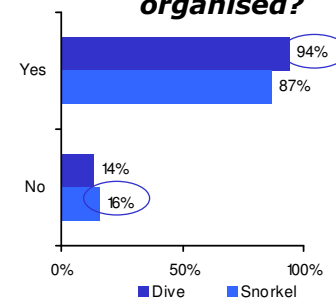
## How many times had they participated previously?



## Where did they launch from?

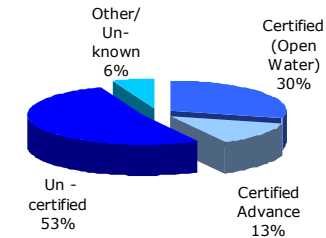


## Was their activity organised?

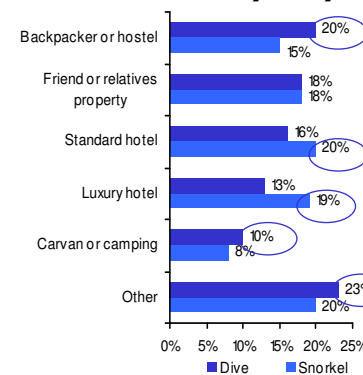


Multiple Responses Accepted

## Level of certification – divers only



## Where did they stay?



Main accommodation used in Australia

Divers were predominantly uncertified, thus it is not surprising that half had never dived before. In the vast majority of instances the dive was organised and undertaken from a boat. Tropical North Queensland and the Whitsundays were the most popular dive locations. Half were diving just once during their trip.

The main types of accommodation used by the international RDS market whilst in Australia were: backpackers/hostel, friends/relatives property or a standard hotel. Divers were more likely to stay at a backpackers/hostel or caravan/camping ground than snorkellers. Conversely snorkellers were more likely to stay in a standard hotel or luxury hotel.

Overall the GBR international RDS market mirrors the overall Queensland international RDS market, this is not surprising as the GBR makes up approximately 93% of the market. However there are a few notable differences: GBR snorkellers were more likely to be on an organised trip (89% compared with 87%); and GBR divers were less likely to be certified (54% compared with 53%).

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## Domestic Market

Source: National Visitor Survey, Tourism Research Australia, Year Ending March 2007

In the year ending March 2007 Queensland received 17.2 million overnight domestic visitors who stayed an average 4 nights in the State. Of these visitors 4% (or 608,000) participated in RDS during their stay.

During this time period the GBR received 4.4 million domestic visitors who stayed an average of 5 nights in the region. Of these visitors 10% (or 454,000) participated in RDS during their stay.

Queensland	Visitors	Visitor Nights in Queensland	Total number of dives/snorkels
RDS Total*	608 000	4 478 000	1 556 000
Dive	143 000	779 000	448 000
Snorkel	551 000	4 277 000	1 108 000
Great Barrier Reef	Visitors	Visitor Nights in Queensland	Total number of dives/snorkels
RDS Total*	454 000	3 850 000	1 267 000
Dive	111 000	645 000	381 000
Snorkel	416 000	3 293 000	886 000

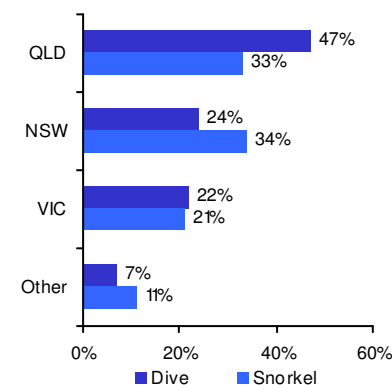
Of the domestic Queensland RDS market 14% participated in both snorkelling and diving activities, 77% snorkelling only and 9% in diving only.

On average, the domestic RDS visitor spends \$279 per day on their trip. Although the sample of surveyed visitors was small there was evidence that divers spend slightly more per day than snorkellers (\$396 compared with \$262).

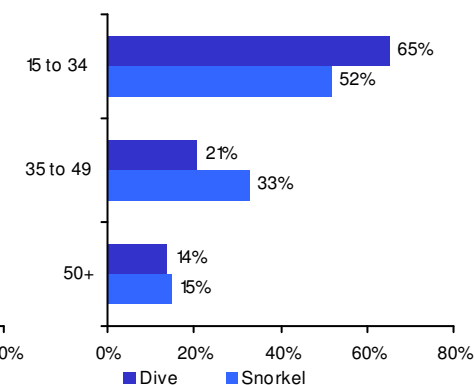
The vast majority of the RDS market were on a holiday (86%) in Queensland, 7% were visiting friends or relatives and 6% were travelling for business.

By and large the domestic RDS market were from Queensland or New South Wales and under 35 years of age. Over half were travelling as a couple or with friends or relatives. However, divers were more likely to travelling alone, while snorkellers were more likely to travel as a family group.

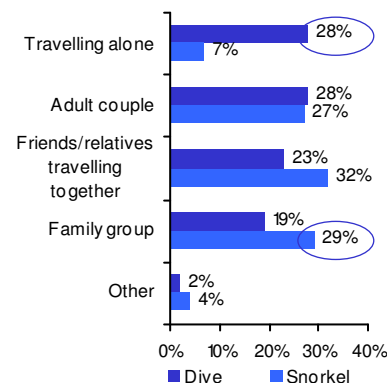
### Where were they from?



### How old were they?



### Who did they travel with?



\* Note Dive and Snorkel do not add to RDS Total as some visitors participated in both

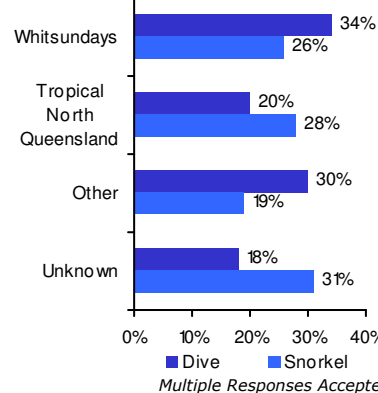
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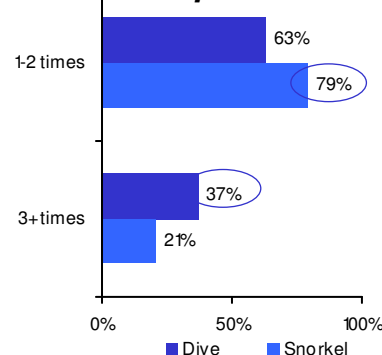


The majority of snorkellers had previous experience, with most having snorkelled three times or more in the past. Four in five participated once or twice during their stay, generally as an organised activity launched from a boat. The most popular snorkel locations in Queensland were the Whitsundays and Tropical North Queensland.

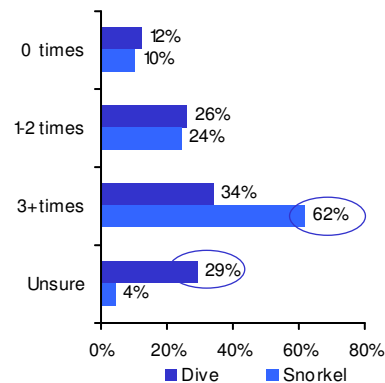
## Where did they participate?



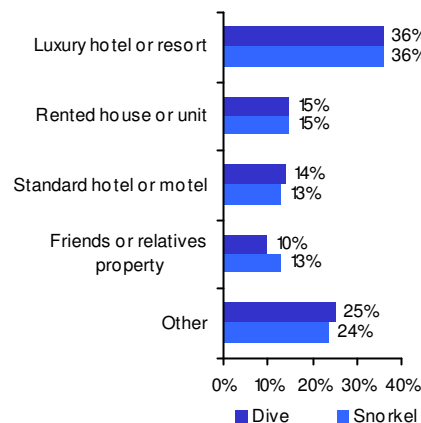
## How many times did they participate on this trip?



## How many times had they participated previously?

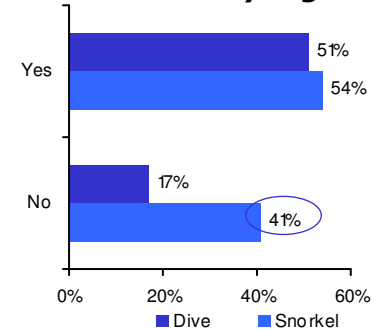


## Where did they stay?

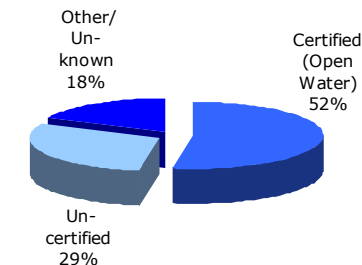


Main accommodation used during trip

## Was their activity organised?



## Level of certification – divers only



For the majority of dive visitors it was not their first experience therefore it is not surprising that most were certified. Three in five went once or twice during their trip, however they were more likely to participate more frequently than snorkellers. In the majority of instances the dive was organised (i.e. part of a tour) and undertaken from a boat. The Whitsundays and Tropical North Queensland were the most popular dive locations.

The majority of the domestic RDS market stayed in a luxury hotel/resort or in a rental house/unit.

The GBR domestic RDS market mirrors the Queensland domestic RDS market, this is not surprising as the GBR makes up approximately three quarters of the market.

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## **Differences between RDS and the average Queensland visitor**

Whether from the international or domestic market, travellers who participated in recreational diving or snorkelling (RDS) tended to stay longer than the average Queensland visitor. International RDS visitors stayed an average of 45 nights in Australia compared with 31 nights for the average international visitor. Similarly, the average domestic traveller stayed 4 nights in Queensland whereas those who participated in either snorkelling or diving stayed an average of 7 nights.

RDS visitors tended to be younger than the average Queensland visitor. The majority of international RDS (59%) and domestic RDS (52%) visitors were aged between 15 and 34 years (compared with 42% of all international and 33% of all domestic visitors to Queensland).

The RDS market was more likely to use commercial accommodation than the average Queensland visitor. One in five international RDS visitors stayed with friends and relatives compared with one in four international visitors overall. Similarly, in the domestic market 13% of RDS visitors stayed with friends and relatives compared with 38% of all domestic visitors to Queensland.

International visitors to Australia commonly stayed with friends and relatives, in a standard hotel or in a luxury hotel. However, compared with the international RDS market they were less likely to stay in backpacker/hostel (7% compared with 20% divers and 15% snorkellers) or camping style accommodation (3% compared with 10% divers and 8% of snorkellers). Domestic RDS visitors first choice in accommodation was a luxury hotel or resort. They were also more likely to stay in this style of accommodation than the average domestic visitor to Queensland (36% compared with 15%).

The RDS market spent more on their trip in total than the average visitor. Domestic RDS visitors spent approximately \$2192 on their trip compared with \$762 for the average domestic visitor to Queensland. International RDS visitors spent approximately \$3968 compared with \$2765 by the average international visitor to Queensland. While the international RDS visitor spent less per day than the average international visitor, their total spend was bolstered by their longer length of trip.

Although not a large proportion of the market, international dive visitors were more likely to be travelling for education purposes than the average international visitor to Queensland (9% compared with 6%).

## **Data Sources:**

The **National Visitor Survey (NVS)** is conducted by Newton Wayman Chong Research on behalf of Tourism Research Australia (TRA). Approximately 80,000 Australian residents aged 14 and over comprise the annual national sample.

The **International Visitor Survey (IVS)** is conducted by Newton Wayman Chong Research on behalf of TRA. IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures data and does not include persons aged under 15 years.

The dive and snorkel section of the NVS and IVS was a special supplementary that ran between April 2006 to March 2007 to provide Tourism Queensland, Great Barrier Reef Marine Park Authority, Workplace Health & Safety Queensland, and Association of Marine Park Tourism Operators with information on this important market.

## **For Further Information:**

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