



Fisheries Queensland: Client Survey Final Report

Friday 19 June 2020

Prepared by Action Market Research and Hudson Howells

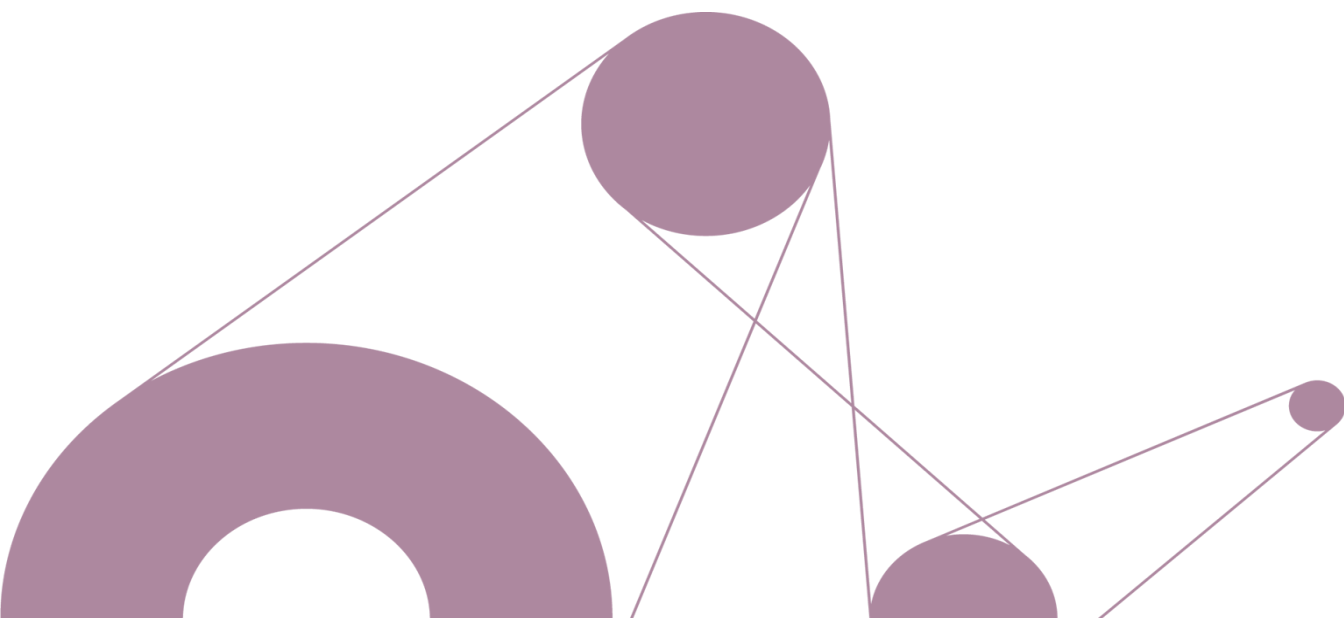
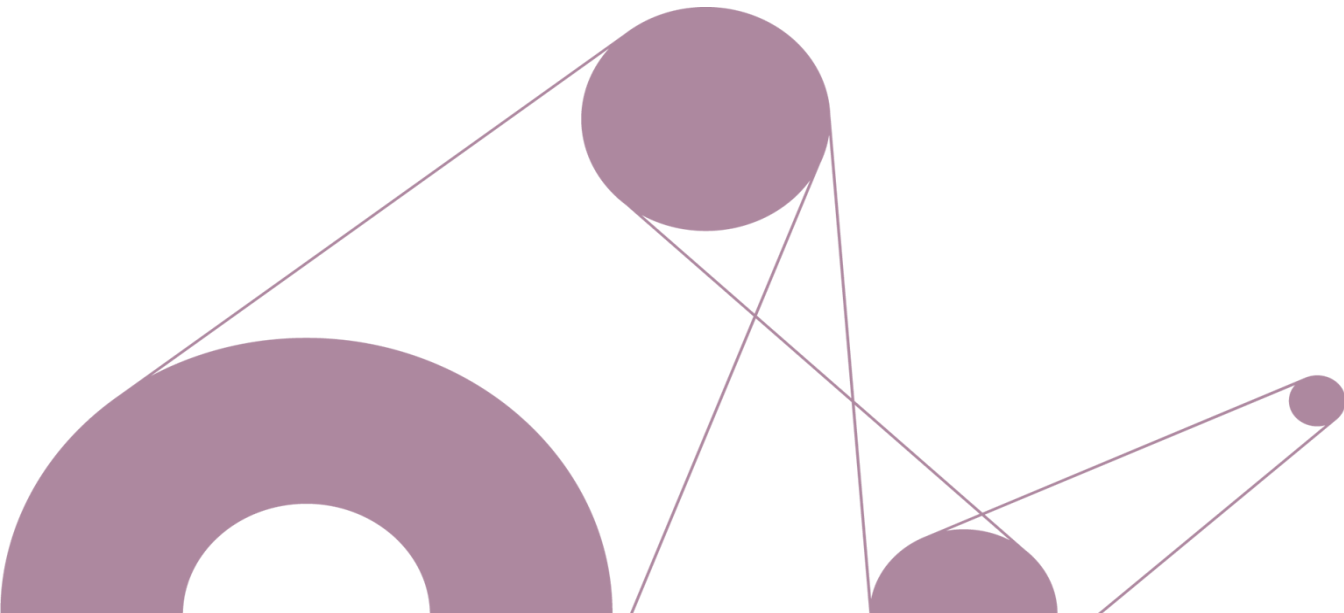


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Introduction and Methodology

Action Market Research and Hudson Howells were engaged by BDO EconSearch to undertake research into the Queensland charter boat fishing industry to better understand the needs and wants of its main client group (recreational fishers) and the capacity of the industry to meet future demand, and identify and describe growth opportunities for the charter boat fishing industry in Queensland.

This research has the following four key phases:

- **Phase 1** – Rapid Appraisal Interviews with key stakeholders in the industry (Completed November 2019)
- **Phase 2** – Operator Depth Interviews (Completed November 2019)
- **Phase 3** – Recreational Fishing Trip Client Survey (**this report**)
- **Phase 4** – Licence Holder/Operator Survey (To be conducted February/March 2020)

This report details the findings captured from the Recreational Fishing Trip Clients' Survey, undertaken from 5th November 2019 to 10th February 2020. A mixed-methodology has been used to maximise the number of completed interviews, including:

- Use of an online research only panel for both Australia and International completes
- Approaching licence holders/operators to have the survey distributed to their database of clients

A total of 707 completed interviews has been achieved, including 229 Current Clients, 213 Lapsed Clients and 265 Potential Clients. n=707 completed provides an accuracy level of +/- 3.6% for these results at 95% confidence (that is, in 95 out of 100 surveys, we would expect the result to be within +/- 3.6%, so we can be 95% confident the 'true' result lies within this range).

Summary of Results Breakdown

Client Type

Current Client	N=229, 32%
Lapsed Client	N=213, 30%
Potential Client	N=265, 37%

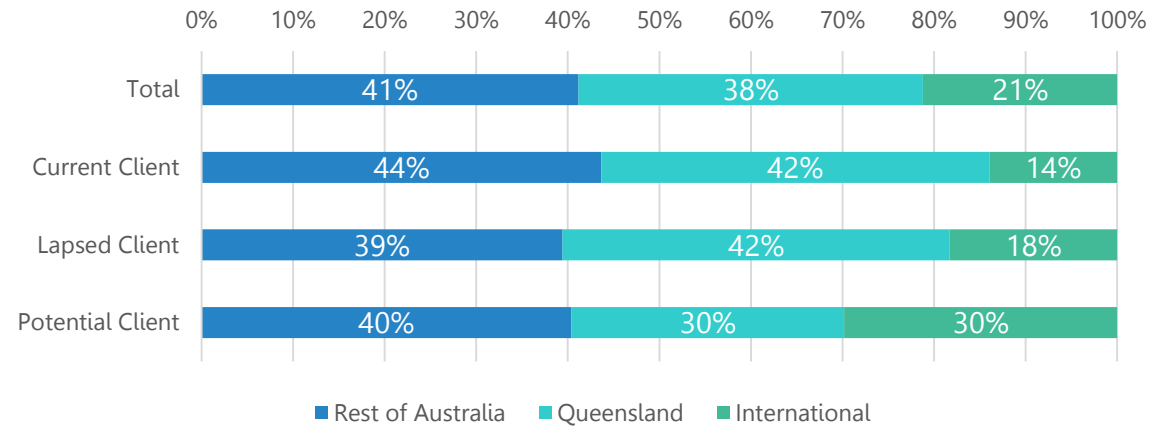
Client Location

Australia	N=557, 79%
International	N=150, 21%

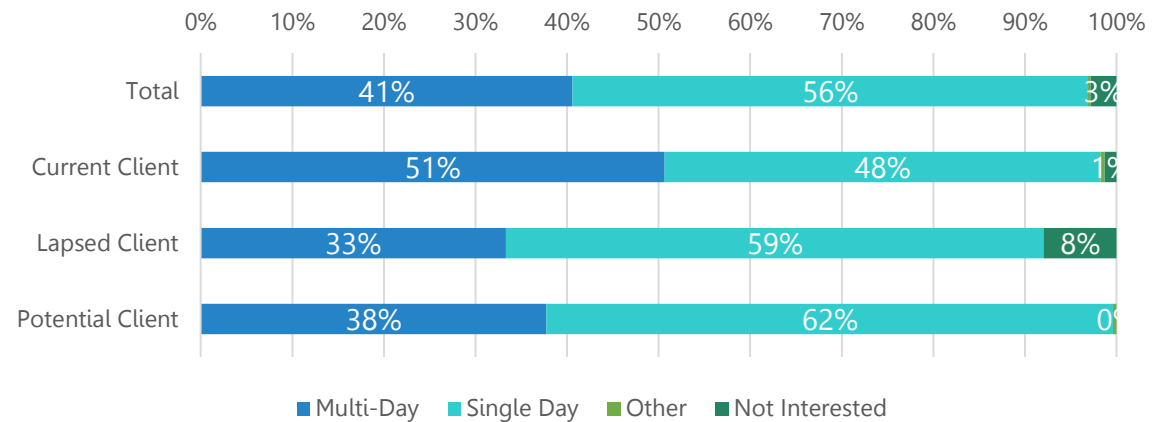
Most Likely Future Trip Type

Multi-day trip – game fishing	N=149, 21%
Multi-day trip – other types of fishing	N=138, 20%
Reef fishing day trips (coral or rocky reefs)	N=268, 38%
Inshore fishing experiences (rivers, inland and other day trips)	N=130, 18%
Other types	N=2, 0%
Not interested in future trip	N=20, 3%

S3. Location - By Client Type

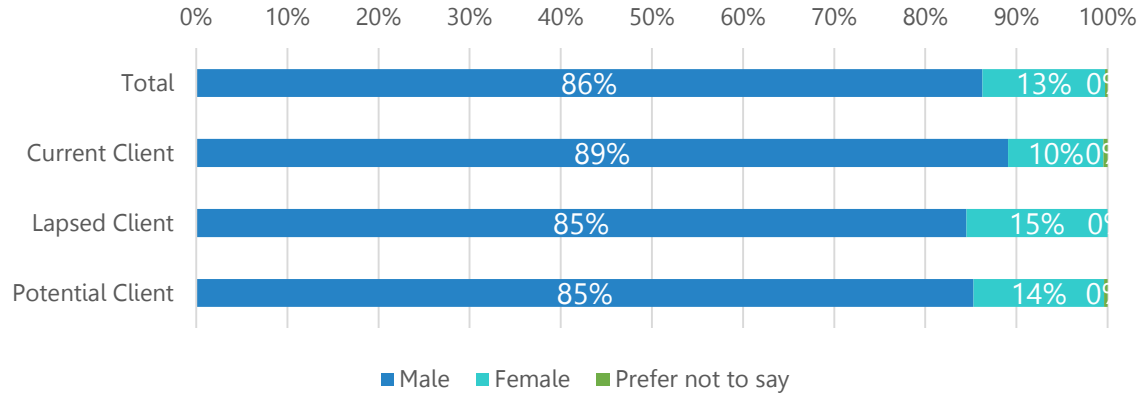


A1c. Most Likely Future Trip By Client Type

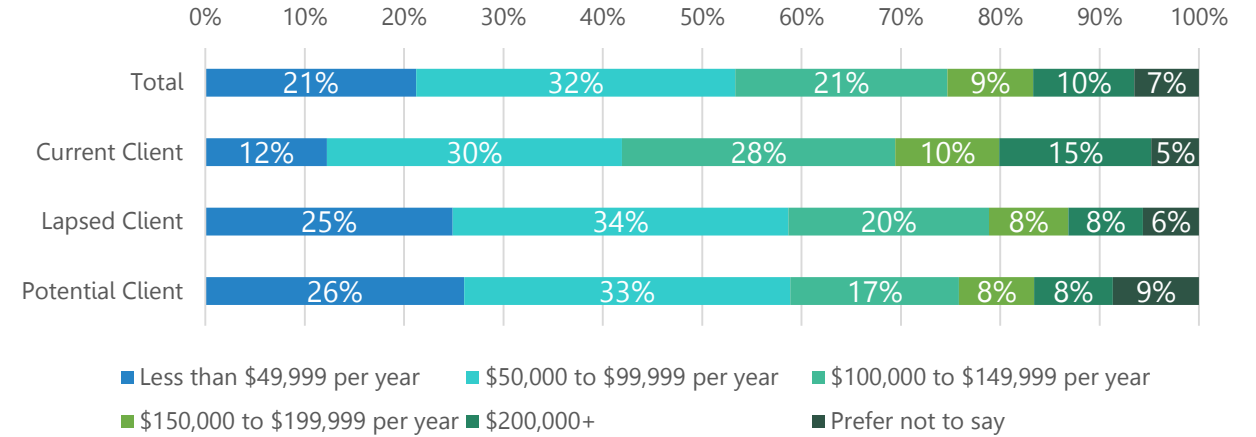


Profile of Respondents – Demographics By Client Type

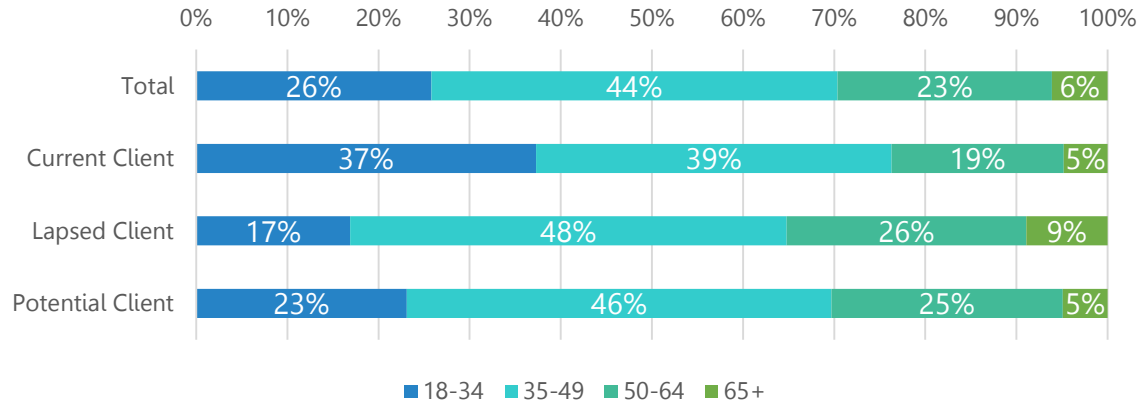
S1. Gender By Client Type



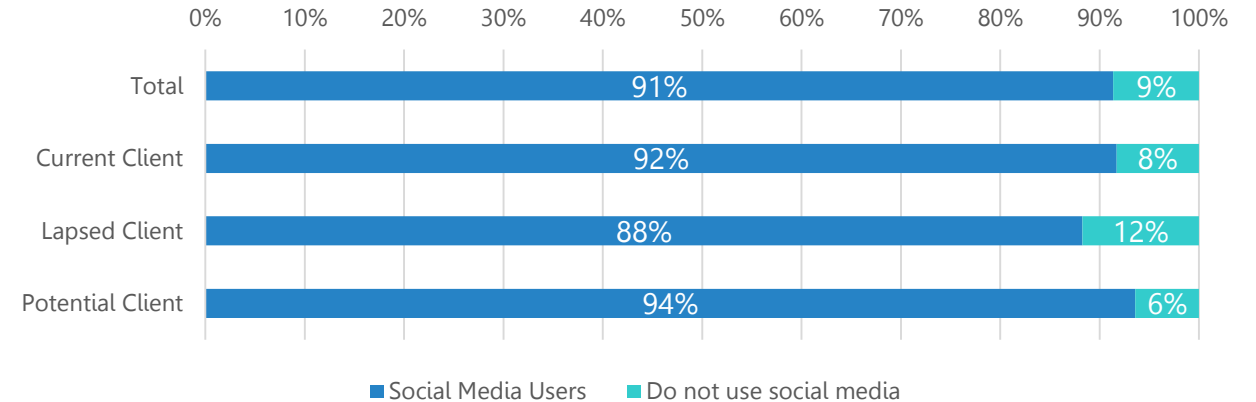
C4. Household Income



S2. Age By Client Type

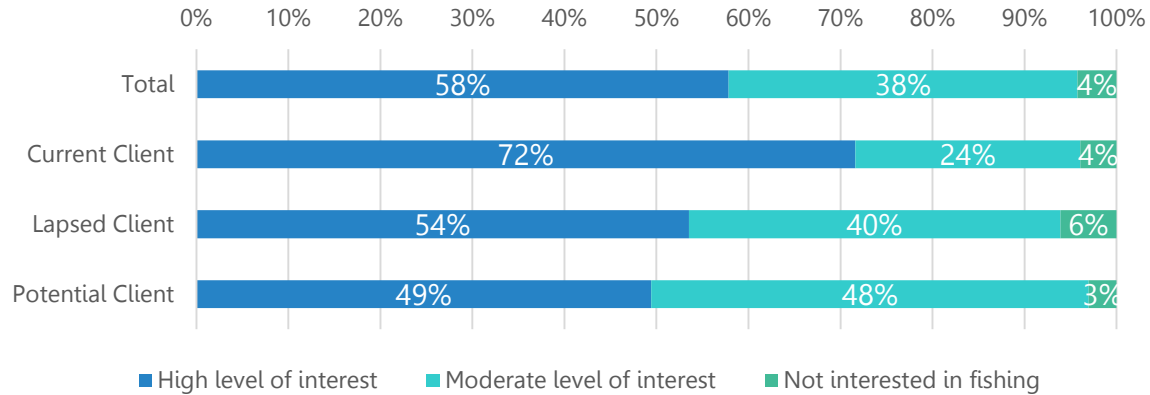


C2. Social Media Usage

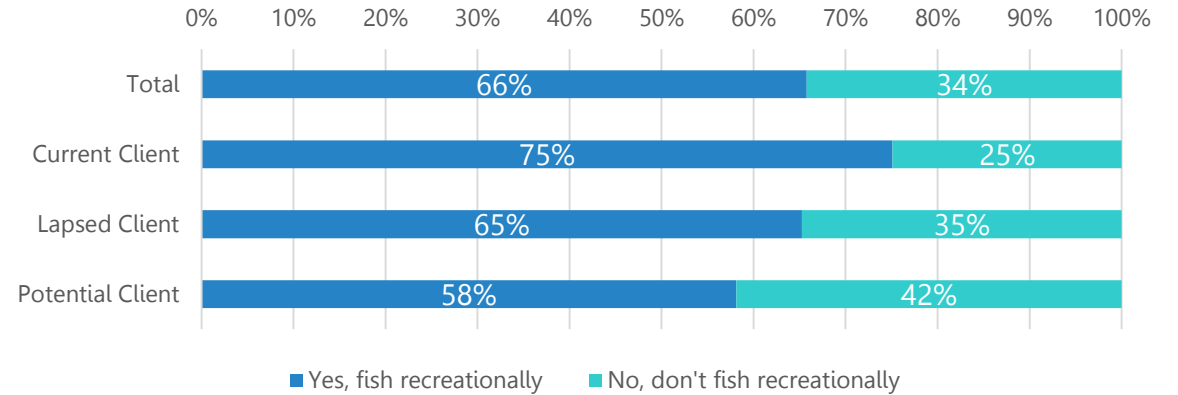


Profile of Respondents – Fishing Activity By Client Type

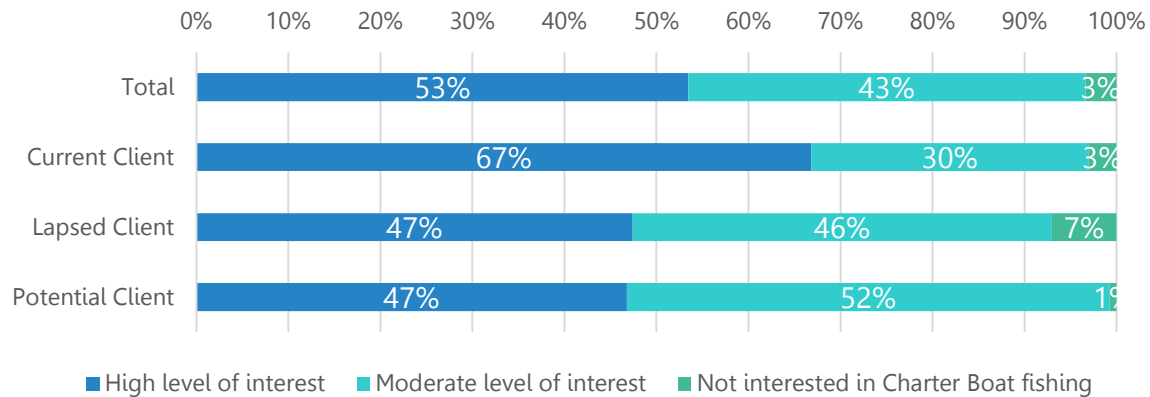
A1. Interest Level In Fishing



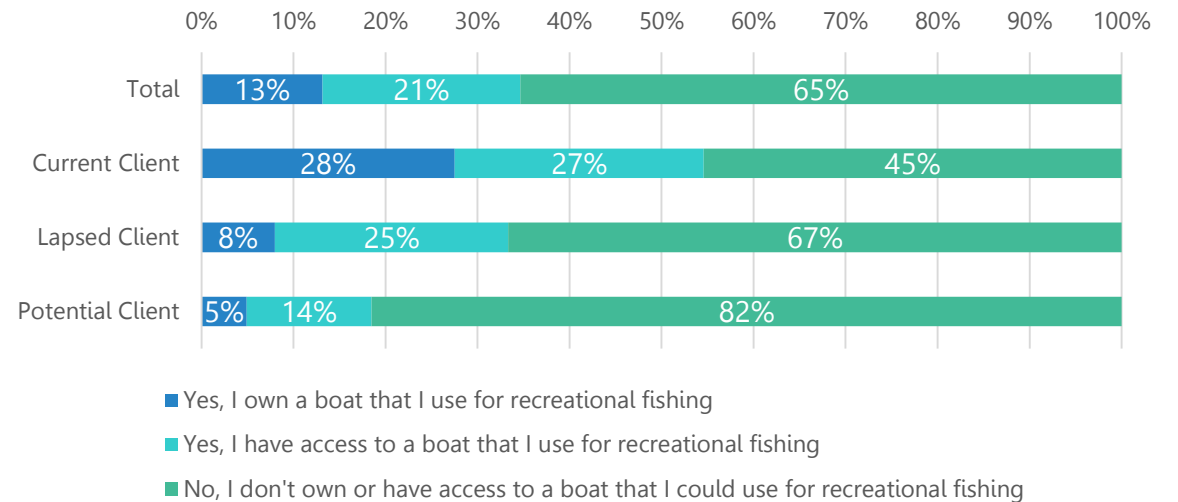
C5. Recreational Fishing



A1a. Interest Level in Charter Boat Fishing



C8. Own or Have Access to Boat



Respondent Profiles Summary

CURRENT CLIENTS (32% of sample)

- Typically **Male** (89%), and **Younger** (37% are 18-34, 44% 35-49)
- Typically **Employed** (87%) and **higher average HH income** (58% \$100K+, 30% \$150k+)
- **Frequent social media users** (92% users, Facebook 76%, YouTube 59%, and Instagram 41%)
- **High level of interest in fishing** (72% interested in recreational fishing, 67% interested in Charter Boat fishing) and also fish recreationally (75%) / have access to a boat (55%)
- **Mostly interested in multi-day experiences** (51%) and will tend to **travel as part of a larger group** (56% group of 4 or more people)

LAPSED CLIENTS (30% of sample)

- Typically **Male** (85%), **Middle-age** (48% are 35-49)
- Typically **Employed** (77%) and **have an average HH income** (59% <\$100k)
- **Frequent social media users** (88% users, Facebook 77%, YouTube 58%, and Instagram 32%)
- **Moderate level of interest in fishing** (54% interested in recreational fishing, 47% interested in Charter Boat fishing) and also fish recreationally (65%), and a third have access to a boat (33%).
- **Mostly want a single day experience** (53%) and will tend to **travel on their own or part of small group** (54% 3 people or less)

POTENTIAL CLIENTS (37% of sample)

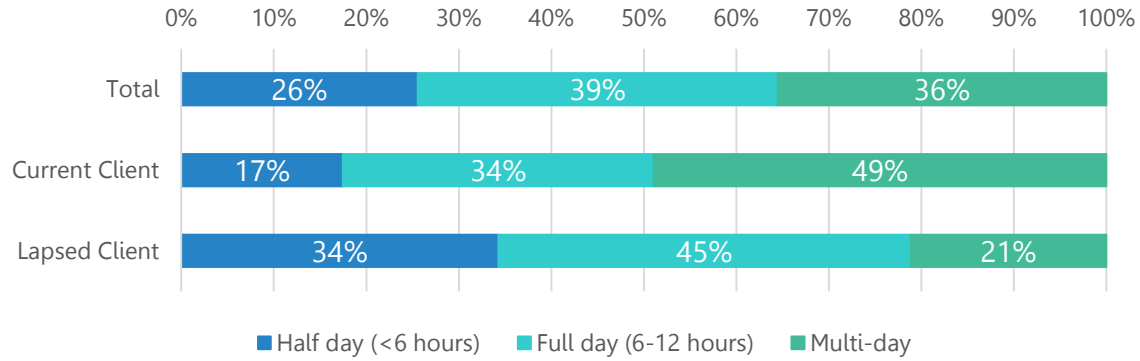
- Typically **Male** (85%), **Middle-age** (46% are 35-49)
- Typically **Employed** (72%) and **have an average HH income** (59% <\$100k)
- **Frequent social media users** (94% users, Facebook 74%, YouTube 69%, and Instagram 37%)
- **Lower level of interest in fishing** (49% interested in recreational fishing, 47% interested in Charter Boat fishing) and also fish recreationally (58%), and tend not to have access to a boat (82% no access).
- **Mostly want a single day experience** (62%)

Current Clients are an extremely important group as they are the most interested in fishing and charter boat experiences and more likely to have the means to undertake further trips in the future.

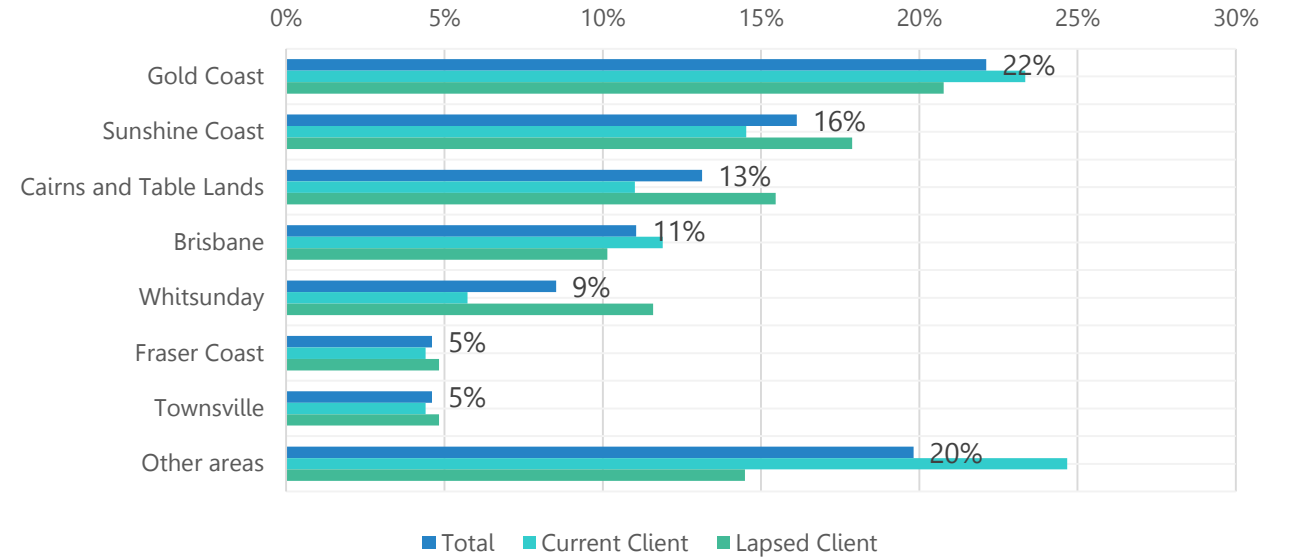
Lapsed and Potential Clients will take additional convincing to persuade them to undertake a future trip. These groups have lower levels of interest in fishing generally, and will be looking for single-day experiences rather than multi-day trips.

Most Recent Trip

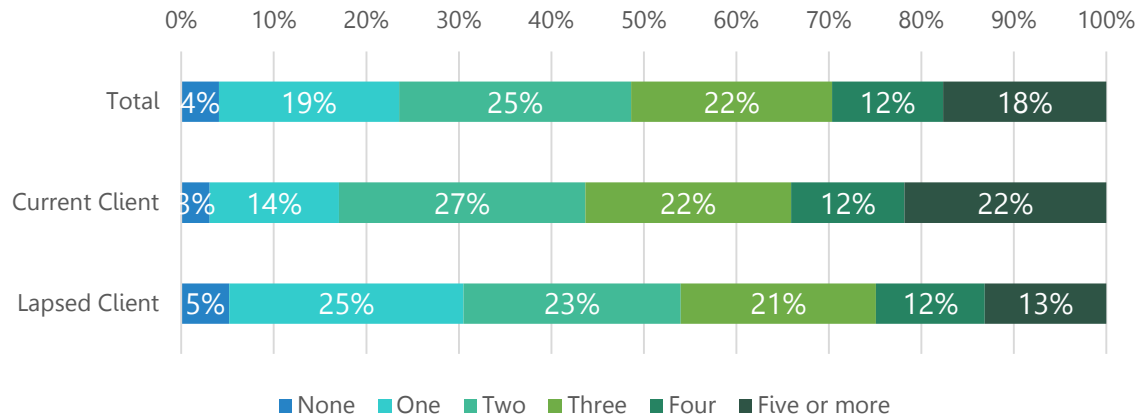
A8. Most Recent Trip Length



A7. Most Recent Trip Departed From



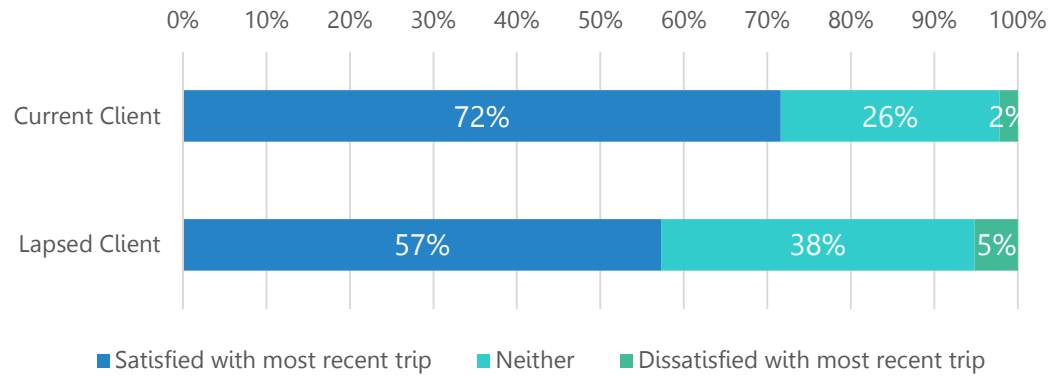
A11. Number of additional friends/family on most recent trip



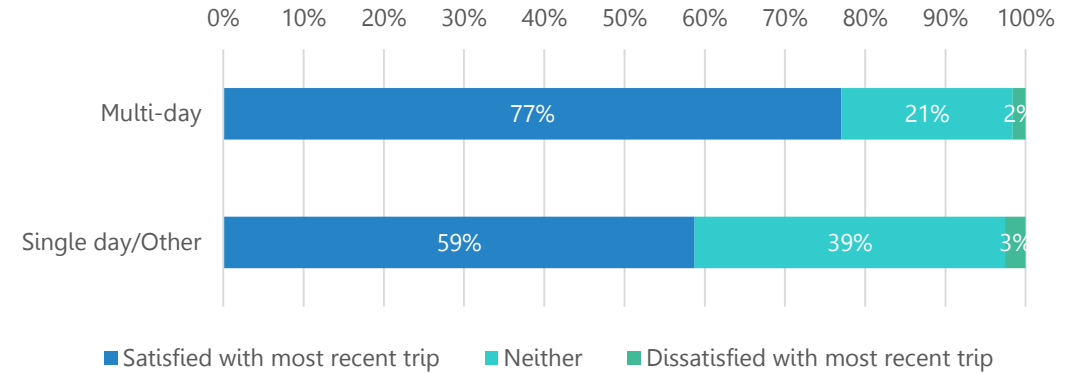
Overall, the **most recent trip** was most likely to have been a single day experience, undertaken with 3 or more family/friends, and most likely to have departed from the Southeast Queensland area (Gold Coast, Sunshine Coast and Brisbane).

Most Recent Trip - Satisfaction

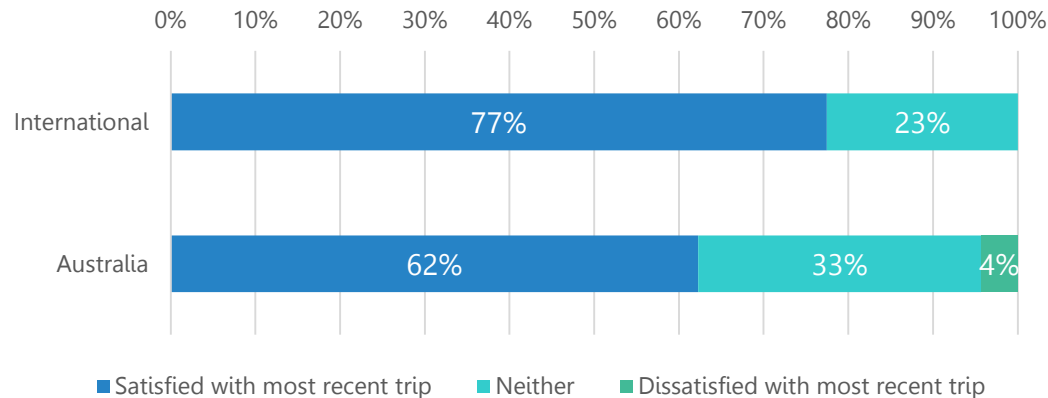
A2. Satisfaction with most recent trip by Client type



A2. Satisfaction with most recent trip by Most Likely Future Trip Type



A2. Satisfaction with most recent trip by Location



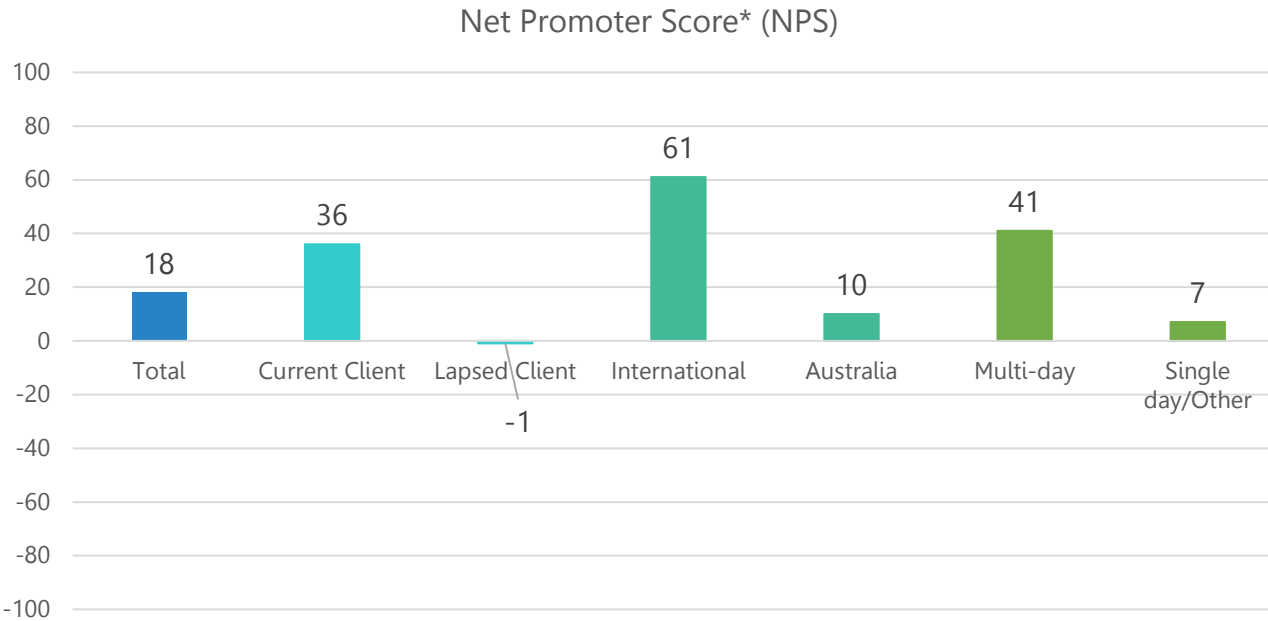
Satisfaction with the most recent Charter Boat fishing experience is strong among all client groups, with this being highest among:

- Current Clients (72%).
- International clients (77%).
- Those who undertake the multi-day experiences (77%).

A2. Now thinking about your most recent charter boat fishing experience, how satisfied were you with your most recent charter boat fishing experience?

Asked of Current and Lapsed clients only, n=442 respondents. Satisfied = Top 3 (8, 9 or 10), Neither = Middle 5 (3, 4, 5, 6 or 7) Dissatisfied = Bottom 3 (0, 1 or 2)

Most Recent Trip – Net Promoter Score



A3. How likely are you to recommend your most recent charter boat fishing experience to family, friends or colleagues?
Asked of Current and Lapsed clients only, n=442 respondents.

*The Net Promoter Score (NPS) is calculated from the recommendation question, where responses are grouped into three categories depending on the score given. Those who gave a 9 or 10 are considered to be 'Promoters' and are those who will naturally and spontaneously positively recommend their most recent charter boat fishing experience. Those who gave a 7 or 8 are considered to be 'Passives' and are those who will not positively recommend or comment negatively about their most recent charter boat experience. Those who gave a score below 7 are considered to be 'Detractors' and are more likely to comment negatively about their charter boat experience.

The **Net Promoter Score** is calculated by subtracting the percentage of Detractors from the percentage of Promoters, giving a score between -100 and +100. A score of -100 would indicate that all respondents are Detractors, and a score of +100 would indicate that all respondents are Promoters.

A negative result indicates more work needs to be done to improve the experience, a positive result is a good result, and a score of +50 is an excellent outcome.

The overall result of +18 indicates that there are more people proactively talking positively about their most recent experience than those who are talking negatively.

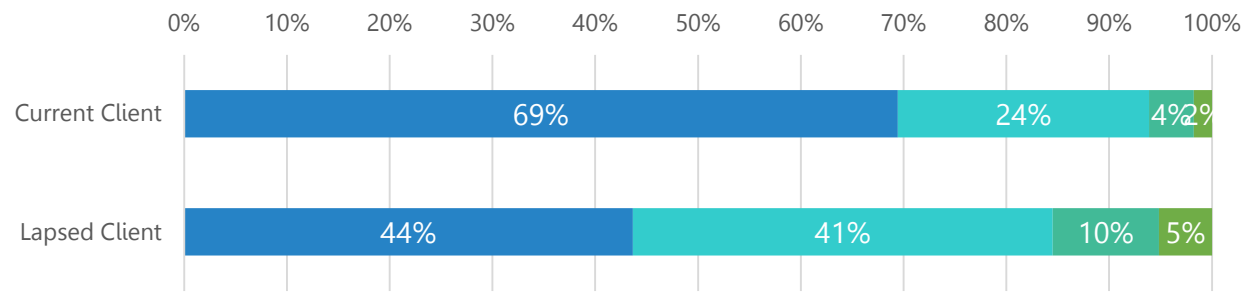
Current Clients have a NPS of +36 indicating a good result, however the Lapsed Client result of -1 indicates more work needs to be done.

International visitors have an excellent result (+61) indicating the majority are proactively talking positively about their experience, with the Australian clients also positive (+10) but at a much lower level.

Clients undertaking multi-day trips have a very strong result (+41) compared to those who undertake a single day (+7).

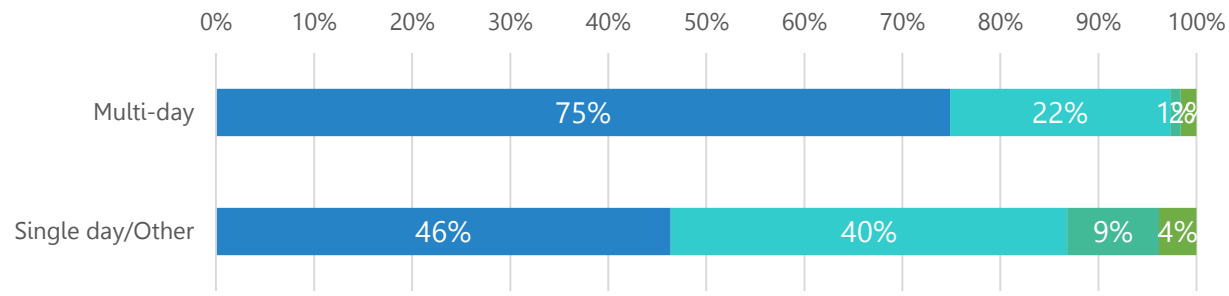
Most Recent Trip – Importance of Charter Boat Trip In Decision To Travel in Queensland

Importance of Charter Boat Trip to Overall Trip by Client Type



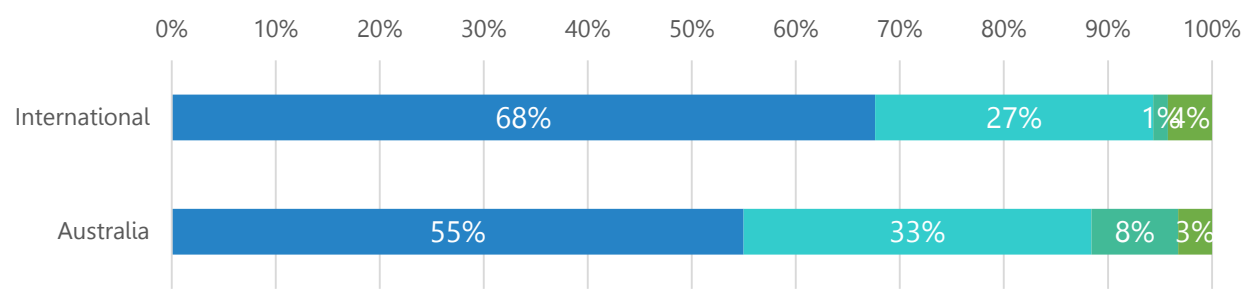
■ Important, would not have travelled otherwise ■ Neither important nor unimportant
 ■ Not important, would have travelled anyway ■ Not applicable

Importance of Charter Boat Trip to Overall Trip by Trip Type



■ Important, would not have travelled otherwise ■ Neither important nor unimportant
 ■ Not important, would have travelled anyway ■ Not applicable

Importance of Charter Boat Trip to Overall Trip by Location



■ Important, would not have travelled otherwise ■ Neither important nor unimportant
 ■ Not important, would have travelled anyway ■ Not applicable

Charter boat trips play an important part in the decision making around overall visitation to Queensland. This is more important for:

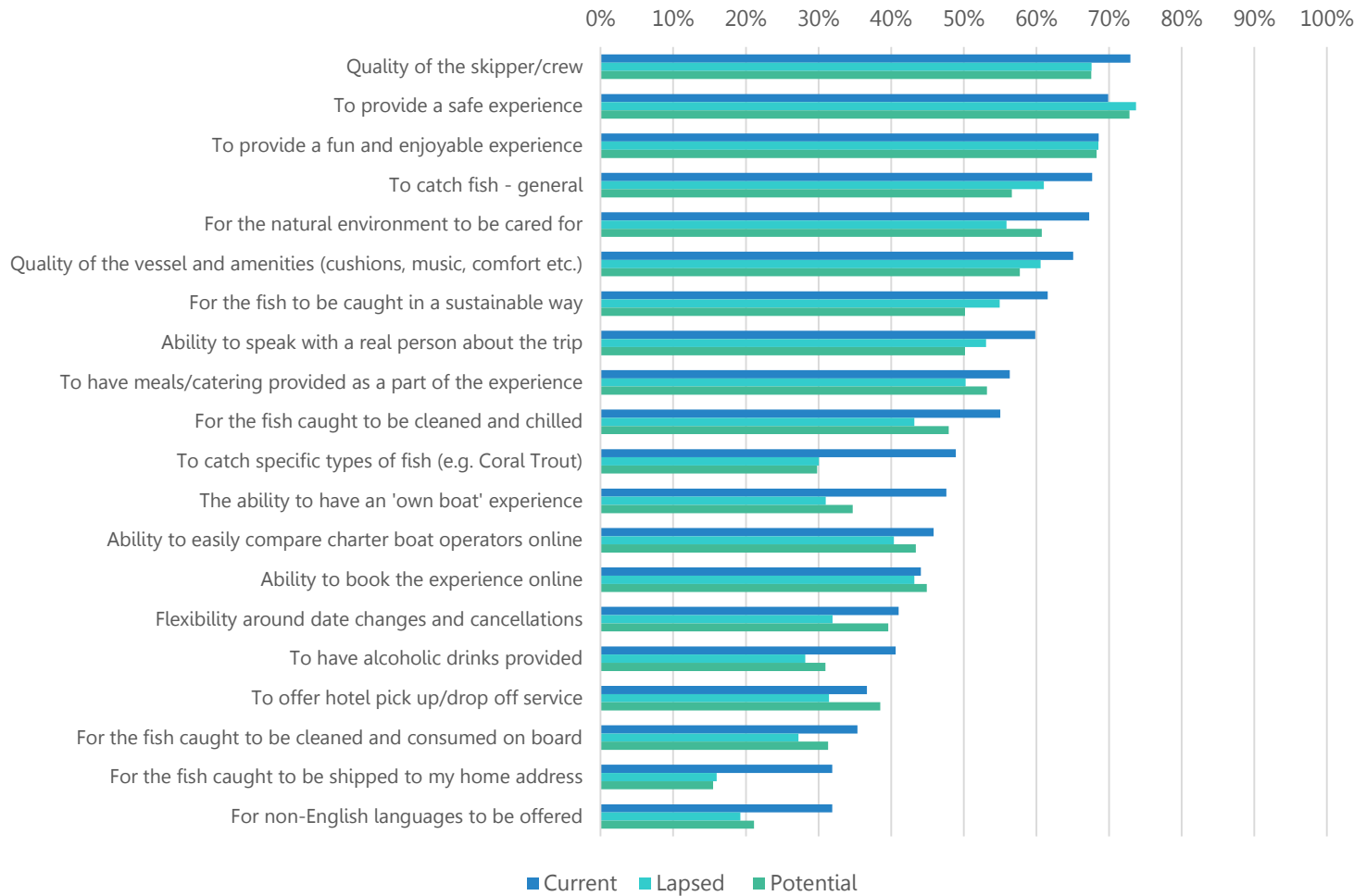
- Current Clients (69%).
- International visitors (68%).
- Those undertaking multi-day trips (75%).

A10. Thinking about the whole time you spent travelling in Queensland when you went on your last charter boat fishing trip, how important was the charter boat trip itself in your decision to travel?

Asked of Current and Lapsed clients only, n=442 respondents. Important = Top 3 (8, 9 or 10), Neither = Middle 5 (3, 4, 5, 6 or 7) Not Important = Bottom 3 (0, 1 or 2)

Important Elements of Charter Boat Fishing Trips

A14. Importance of different elements of Charter Boat Fishing Trip



These results have been presented and compared using the Top 3 Box (those who rated an 8, 9 or 10) and this comparison allows us to present a hierarchy of important charter boat fishing trip elements.

Overall, the top 3 important elements are common among all client types:

- **Quality of the skipper/crew**
- **To provide a safe experience**
- **To provide a fun and enjoyable experience**

When comparing between the client types we see there are slightly different priorities for each client group.

'To provide a safe experience' is a more important element for both Lapsed and Potential clients, compared to Current Clients.

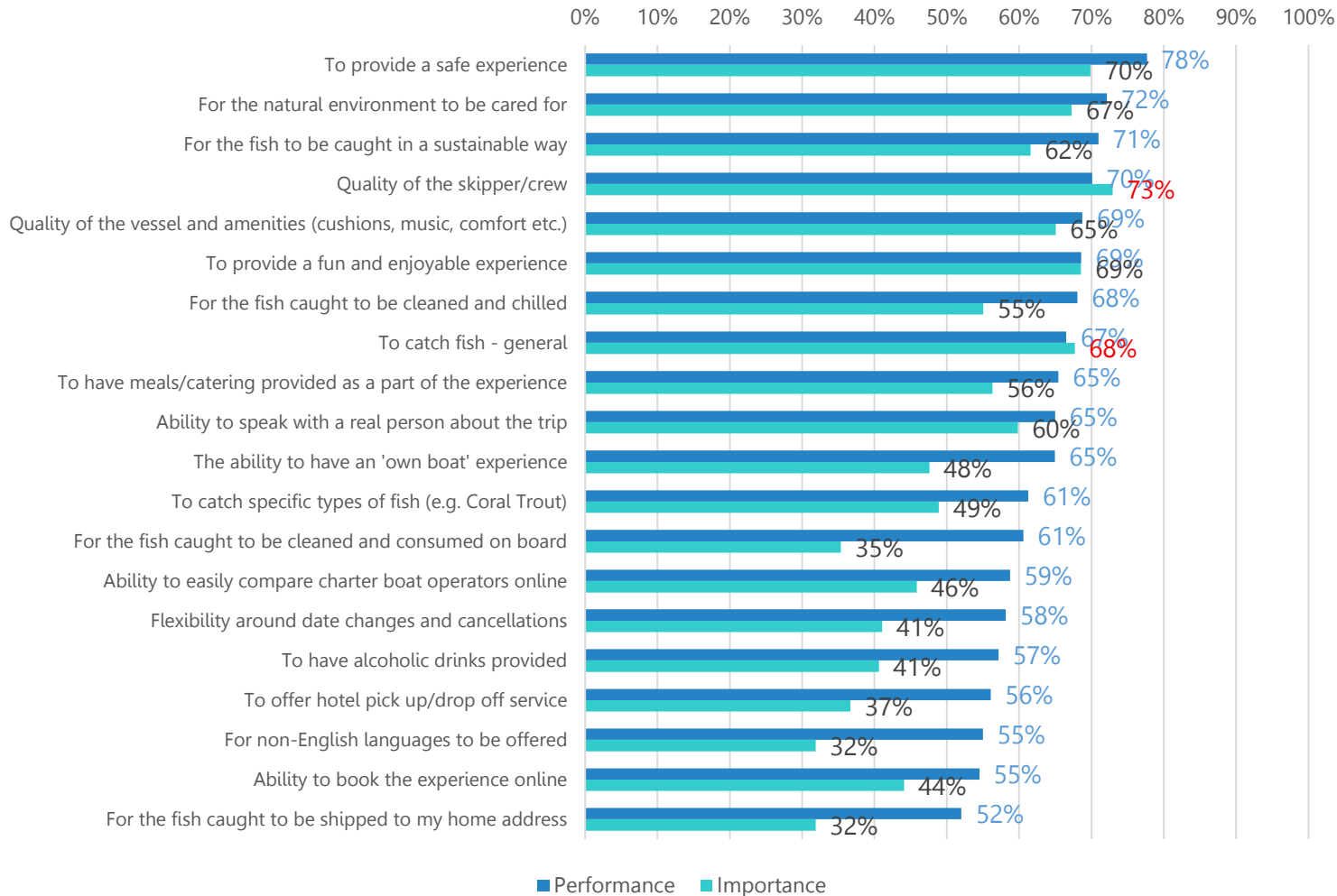
For Current Clients, the 'quality of the skipper/crew', 'to catch fish', and 'for the natural environment to be cared for' are all highly important and more so than the other client groups. Current Clients rate 'catching specific types of fish' and have 'an 'own boat' experience' as much more important elements than Lapsed and Potential Clients.

Those elements that are less important relate more to specific individual needs ('non-English languages offered', 'for fish caught to be shipped home').

A14. Thinking about charter boat fishing trips in general, how important are the following elements to you?
 Asked of all respondents, n=707 respondents. Results displayed above are the important results % Top 3 (8, 9 or 10).

Most Recent Trip – Performance vs Importance (Current Clients)

A14. Importance of different elements of Charter Boat Fishing Trip (Current Clients)



When comparing the Performance versus Importance results, we can determine specific elements where clients perceive the performance is above expectations, where it is meeting expectations or where improvements are needed.

Overall, Current Clients consider the majority of elements tested are performing above their expected level of importance. Of the 20 elements tested, 17 of these are performing above the level of importance, one is performing at the level of importance, and two are performing below the level of importance.

The elements that are performing below the level of importance are:

- Quality of the skipper/crew (73% Importance, 70% Performance).
- To catch fish – general (68% Importance, 67% Performance).

The element that is performing at the level of importance is:

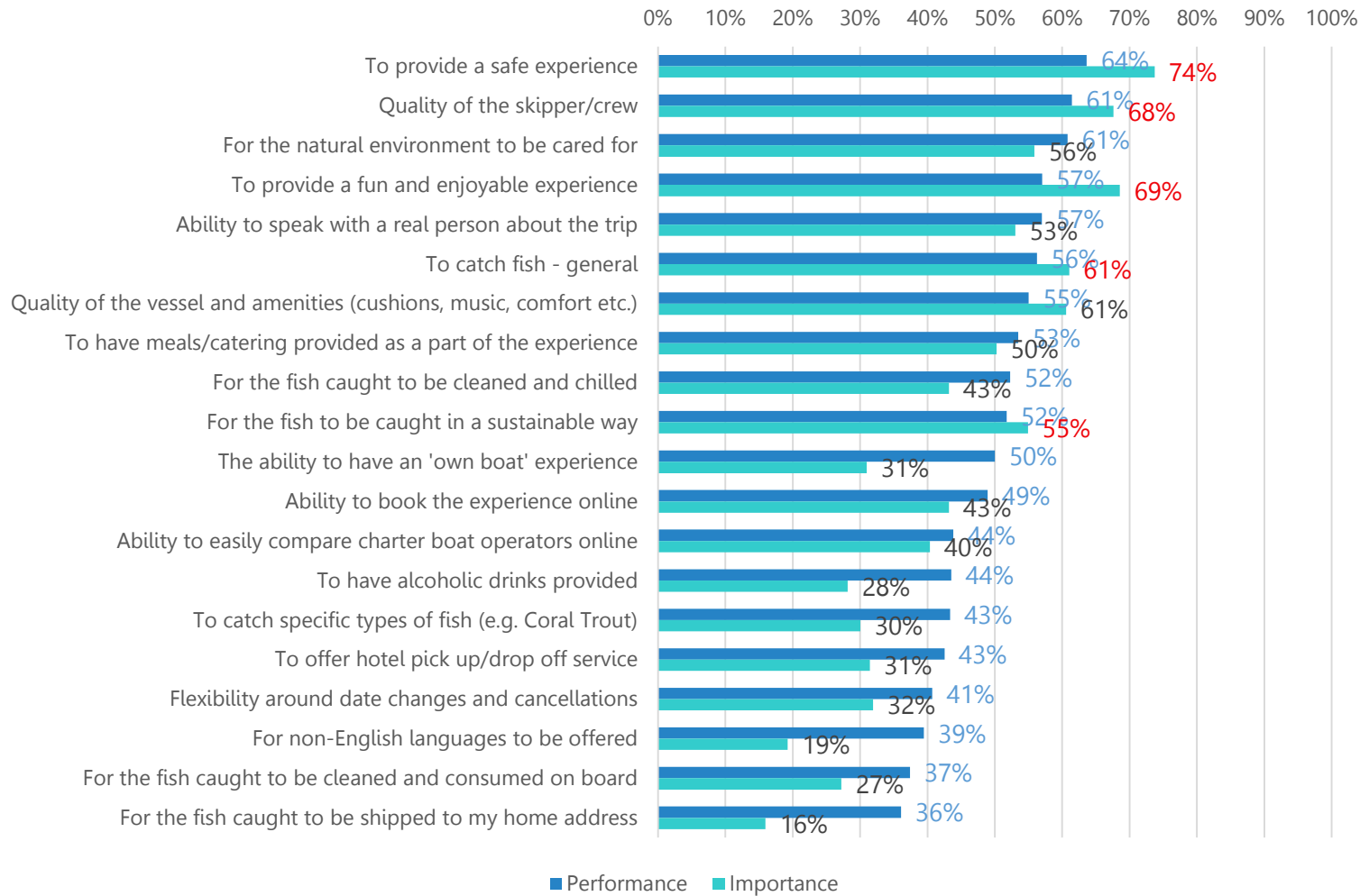
- To provide a fun and enjoyable experience.

A14 (Importance) vs A15 (Performance) comparison

Current Clients only, n=229, Comparison of % Top 3 Importance (8, 9 or 10) vs Top 3 Performance (8, 9 or 10).

Most Recent Trip – Performance vs Importance (Lapsed Clients)

A14. Importance of different elements of Charter Boat Fishing Trip (Lapsed Clients)



For the Lapsed Clients, there are several elements where the level of performance is below the level of importance. Of the 20 elements tested, 14 of these are performing above the level of importance, with 6 performing below the level of importance. However, the performance of the top 3 important elements is below Lapsed Client expectations.

The elements that are performing below the level of importance are:

- To provide a safe experience (74% Importance, 64% Performance)
- Quality of the skipper/crew (68% Importance, 61% Performance).
- To provide a fun and enjoyable experience (69% Importance, 57% Performance)
- To catch fish – general (61% Importance, 56% Performance)
- Quality of the vessel and amenities (61% Importance, 55% Performance)
- For the fish to be caught in a sustainable way (55% Importance, 52% Performance)

A14 (Importance) vs A15 (Performance) comparison

Lapsed Clients only, n=213, Comparison of % Top 3 Importance (8, 9 or 10) vs Top 3 Performance (8, 9 or 10).

Most Recent Trip Summary

CURRENT CLIENTS (32% of sample)

- Typically a **longer trip**, 17% half day, 34% full day, 49% multi-day
- Undertook trip in a **group with an additional 3 or more people** (56%)
- **Mostly satisfied with most recent trip** (72%)
- **Net Promoter Score of +36** is a good result, indicating more are proactively talking positively about experience.
- Charter Boat trip was an **important element as to their decision to travel in Queensland** (69%).
- Top 3 important elements of a Charter Boat trip include **quality of the skipper/crew, to provide a safe experience, and to provide a fun and enjoyable experience.**
- Areas where performance is at or below importance include **quality of the skipper/crew, to catch fish (general), and to provide a fun and enjoyable experience**

LAPSED CLIENTS (30% of sample)

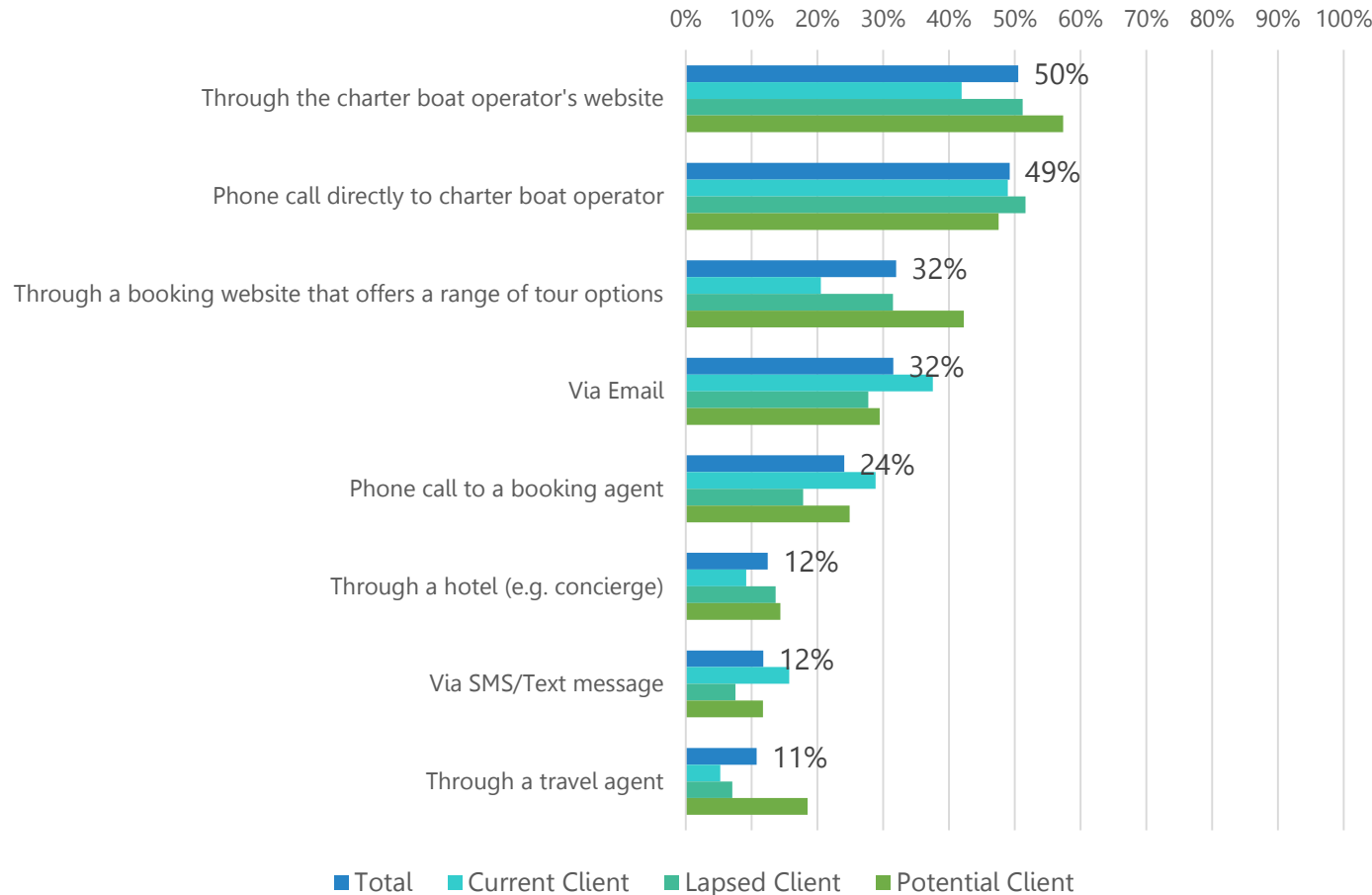
- Typically a **shorter trip**, 34% half day, 45% full day, 21% multi-day
- Undertook trip in a **group with an additional 2 or more people** (69%)
- **Moderately satisfied with most recent trip** (57%)
- **Net Promoter Score of -1** indicates more work needs to be done, with more proactively talking negatively about experience.
- Charter Boat trip was a **somewhat important element as to their decision to travel in Queensland** (44%).
- Top 3 important elements of a Charter Boat trip include **to provide a safe experience, to provide a fun and enjoyable experience, and the quality of the skipper/crew.**
- Areas where performance is below importance include **to provide a safe experience, the quality of the skipper/crew, to provide a fun and enjoyable experience, to catch fish, the quality of the vessel/amenities, and for fish to be caught in a sustainable way.**

Current Clients are an extremely important group as they offer the potential to positively influence others to undertake charter boat fishing trips. The charter boat experience is their main purpose for travelling in Queensland, and their trips are usually undertaken in groups and on longer multi-day experiences. This group is looking for a fun and enjoyable experience with a high quality skipper and crew.

Lapsed Clients will need a lot of work to convince them to undertake another trip in the future. The charter boat experience is more likely to not be the main purpose of their trip to Queensland, and their trips are usually shorter in nature. Safety is key to this group as a part of a fun and enjoyable experience with a high quality skipper and crew.

Bookings and Payments – Expected Booking Method By Client Type

A19. Expected Booking Method – By Client Type



Overall, clients expect to be able to book via the charter boat operator's website, or via a phone call directly to the charter boat operator.

Current and Lapsed Clients expect to be able to call the charter boat operator directly to make their booking over visiting their website and booking online. Their preference for a phone call might indicate that these clients are booking with operators they have used in the past.

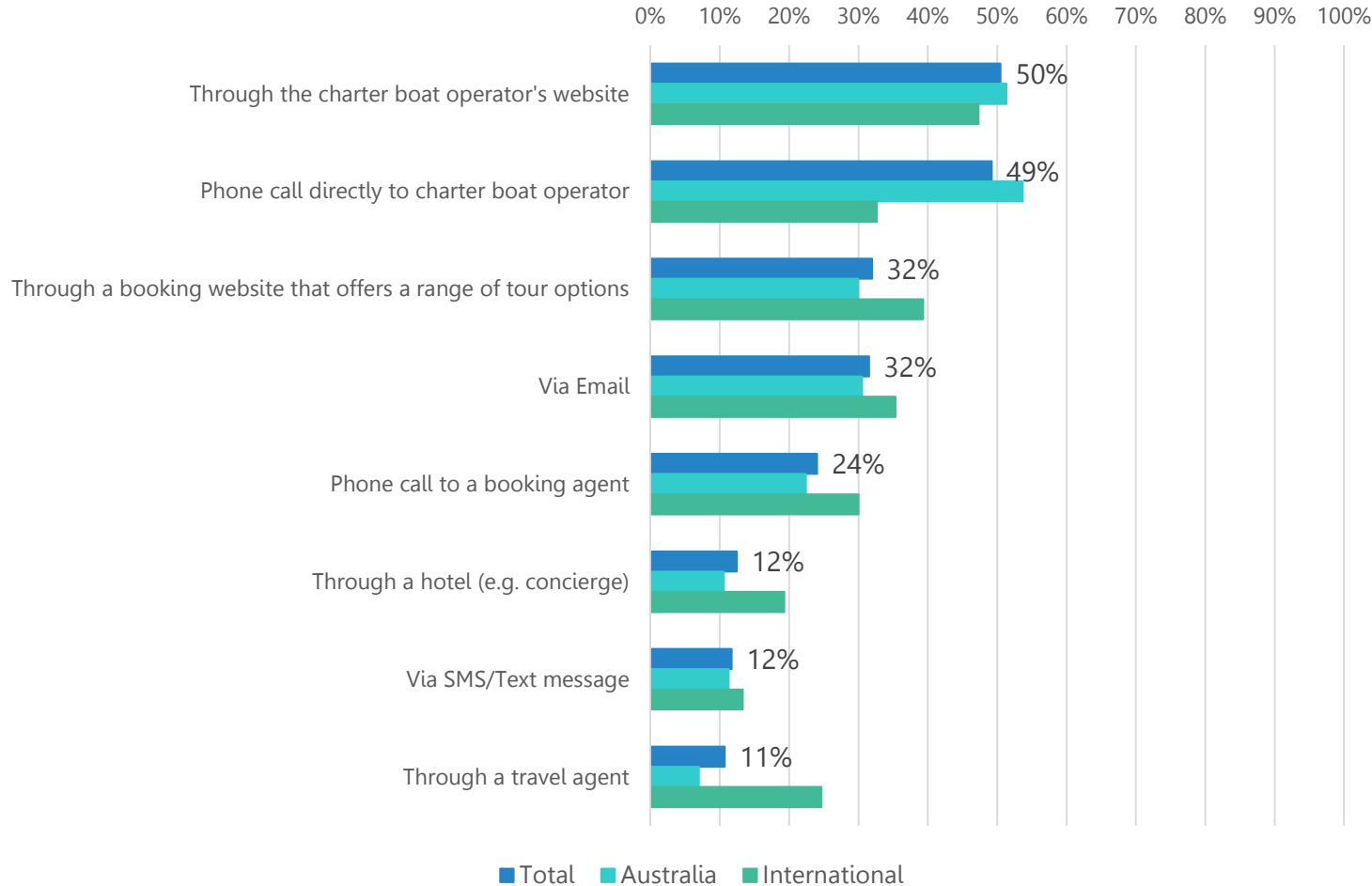
Potential Clients prefer booking via the operators website, but would also expect to be able to call the operator directly.

Clients don't expect to book through a travel agent, via SMS/text message, or through a hotel.

A19. If you were to book a charter boat fishing trip, which of the following ways would you expect to book your trip?
All Respondents, n=707, presented by Client Type

Bookings and Payments – Expected Booking Method By Location

A19. Expected Booking Method - By Location



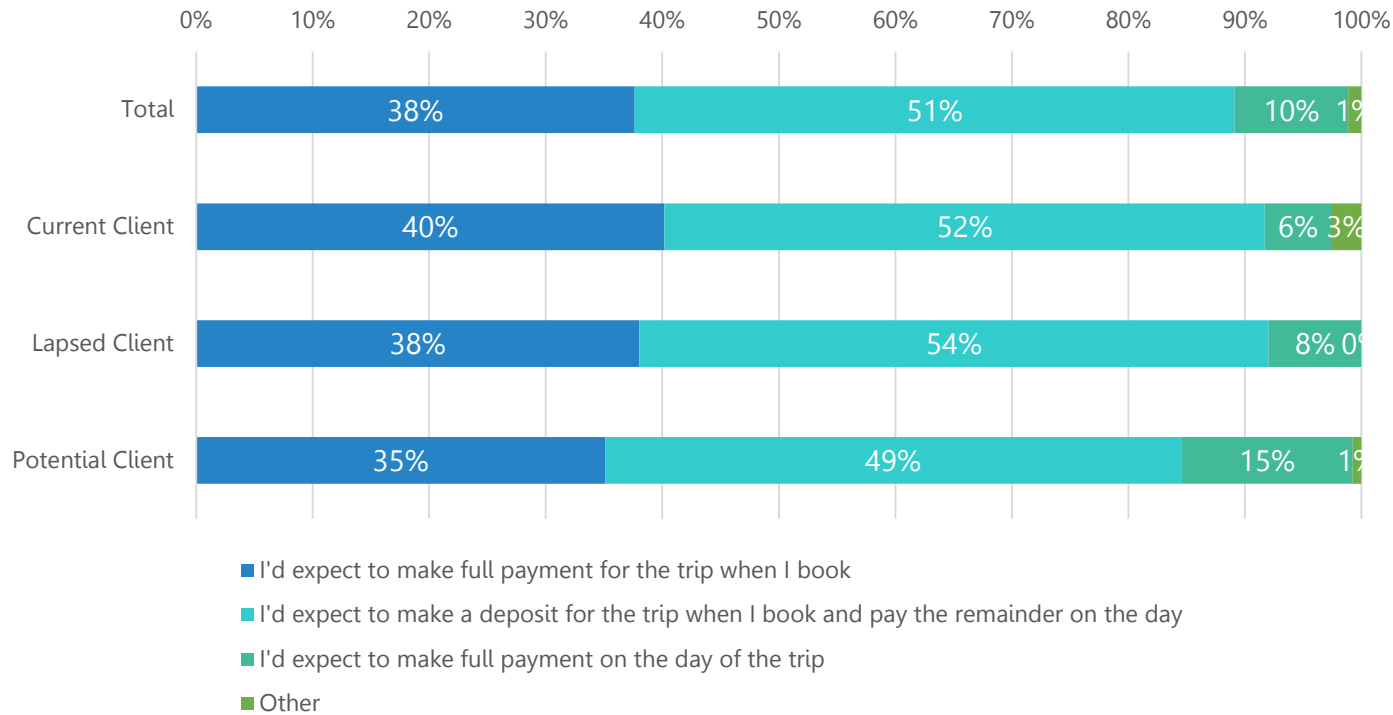
Australian Clients expect to be able to call the charter boat operator directly to make their booking over visiting their website and booking online.

International Clients prefer booking via the operator's website or through a booking website that offers a range of tour options, or via email. International clients are unlikely to make contact with the operators directly by phone.

A19. If you were to book a charter boat fishing trip, which of the following ways would you expect to book your trip?
All Respondents, n=707, presented by Location

Bookings and Payments – Payment Expectations By Client Type

A20. Payment Expectations By Client Type

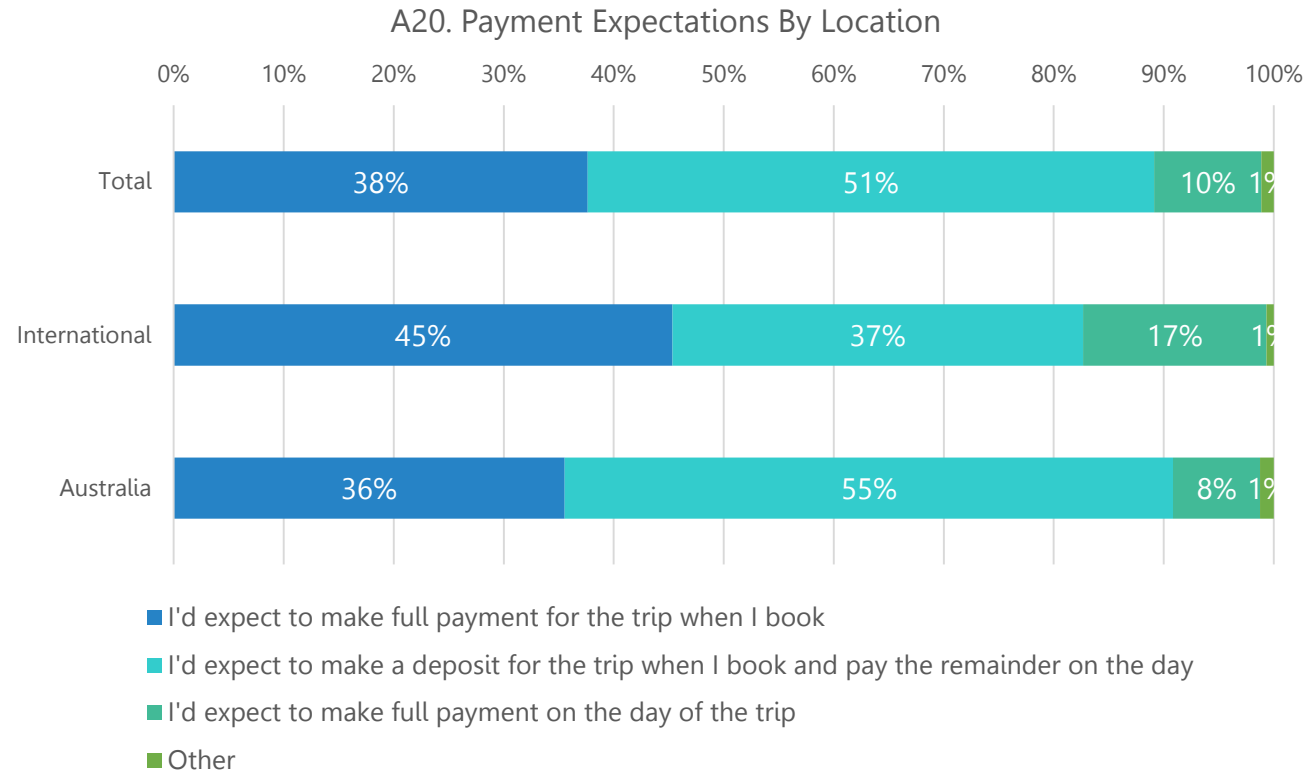


Overall, **all clients** expect to make some form of payment up-front prior to the trip itself. This is expected in the form of a deposit on the day of making the booking, with the remainder due on the day of the trip itself (51%), or the pay the full amount upfront (38%).

A20. And when would you expect to pay for the charter boat fishing trip?

All Respondents, n=707, presented by Client Type

Bookings and Payments – Payment Expectations By Location



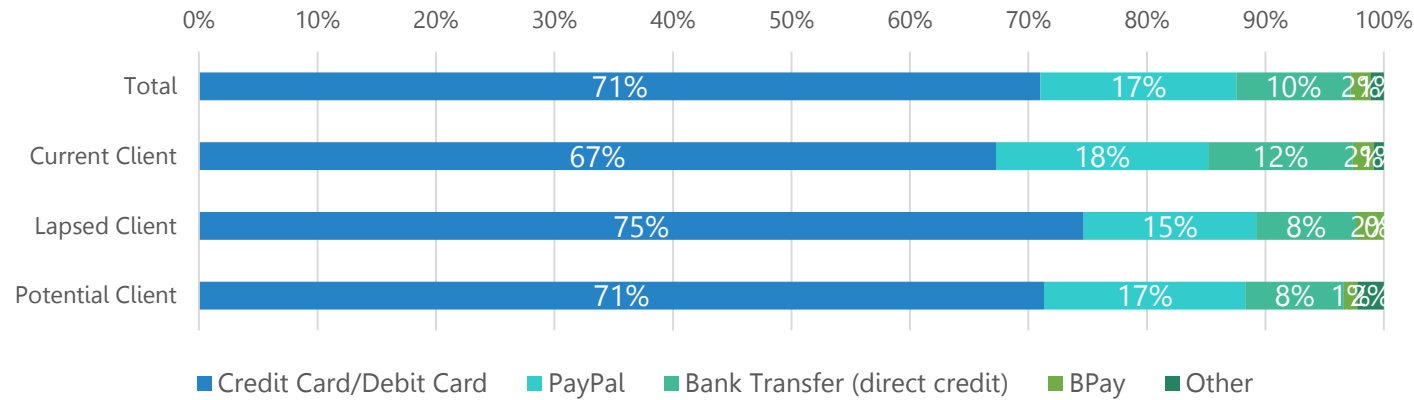
Australian Clients are more likely to expect to make a deposit when the charter boat trip is booked, whereas **International Clients** are more likely to expect to make full payment for the trip at the time of the booking.

A20. And when would you expect to pay for the charter boat fishing trip?

All Respondents, n=707, presented by Location

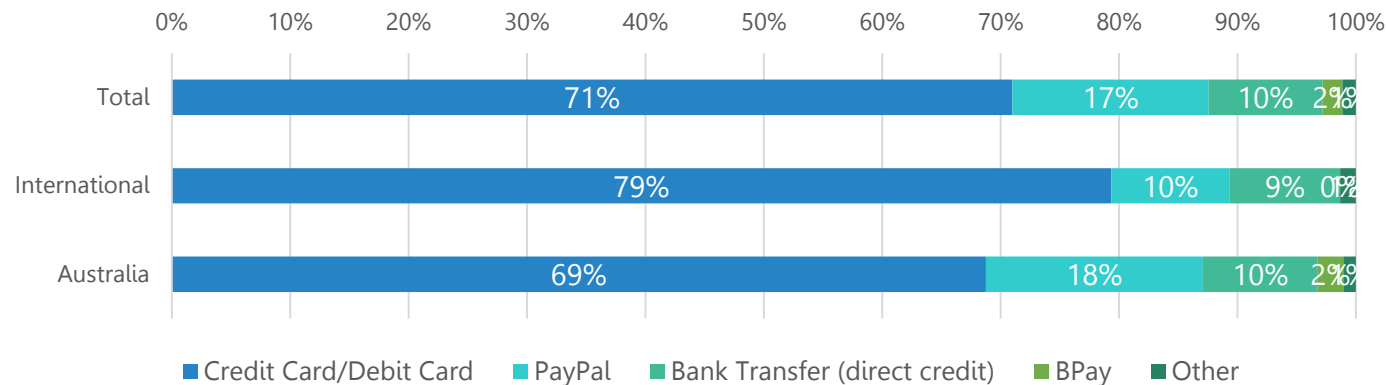
Bookings and Payments – Preferred Payment Method By Client Type

A21. Preferred Payment Method By Client Type



Overall, for all client types, the most preferred payment method is **credit card/debit card**.

A21. Preferred Payment Method By Location



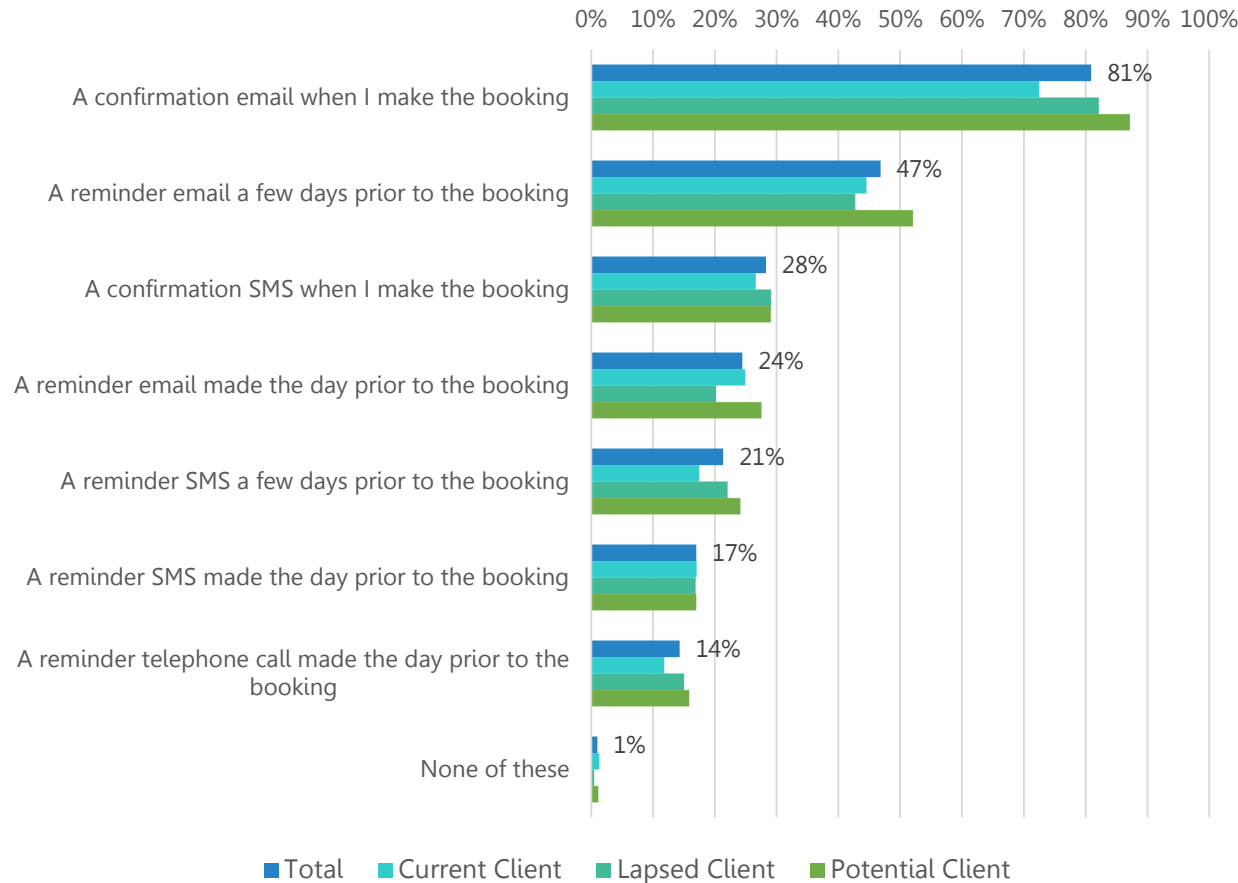
International clients have a stronger preference for paying via credit card/debit card.

A21. And what is your preferred payment method?

All Respondents, n=707, presented by Client Type

Bookings and Payments – Confirmation/Reminders By Client Type

A21a. Confirmation and Reminders By Client Type



The majority of clients (81%) expect to receive a confirmation email when the booking is made. Approximately half (47%) expect to receive a reminder email a few days prior to the booking.

Potential Clients are more likely to expect a confirmation email (87%) and a reminder email sent a few days prior to the booking (52%).

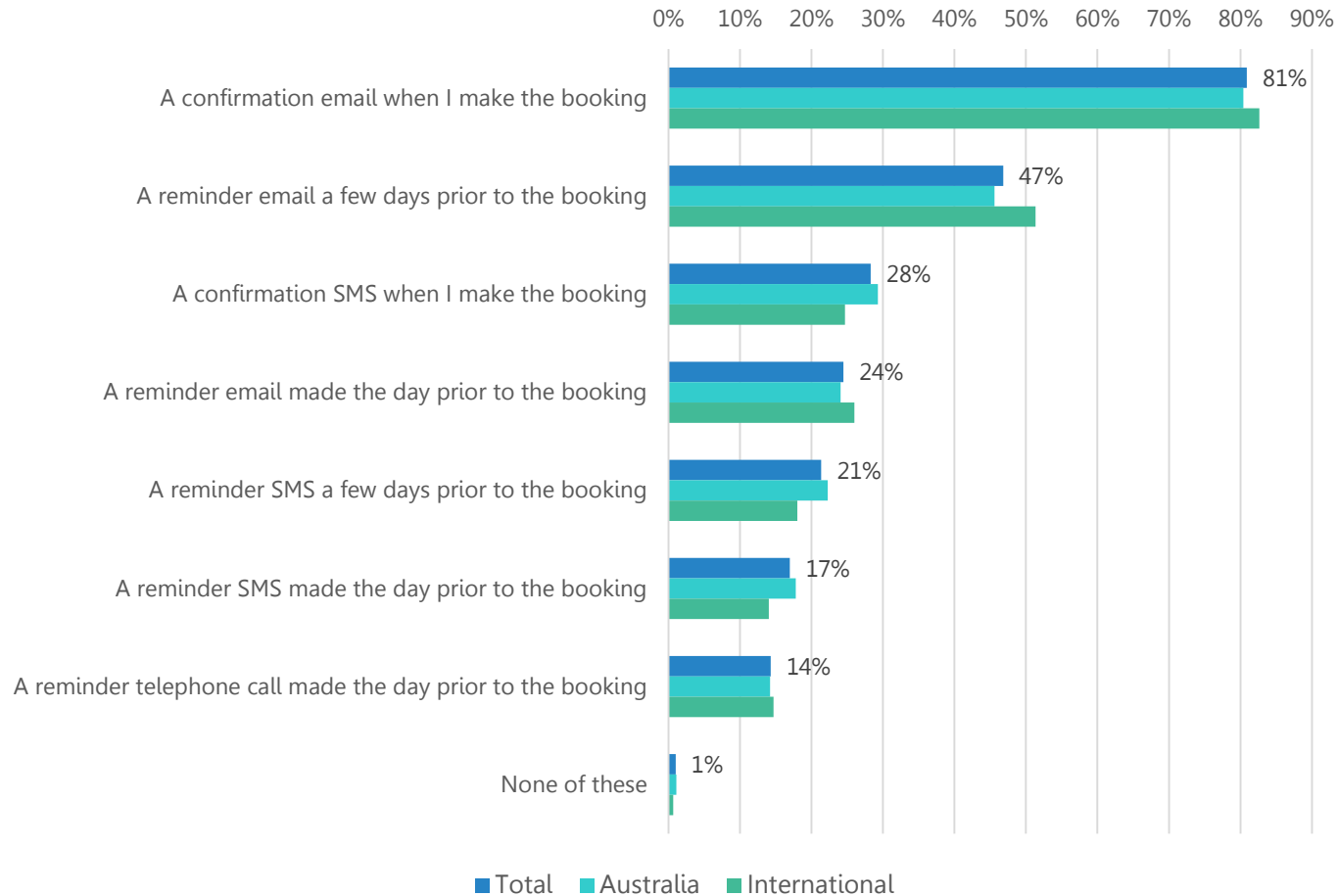
Confirmation/Reminders via SMS are expected by approximately a quarter of respondents.

Clients would not expect to receive a telephone call prior to the trip itself.

A21a. And once you have your charter boat fishing trip booked, which of the following would you expect to receive?
All Respondents, n=707, presented by Client Type

Bookings and Payments – Confirmation/Reminders By Client Type

A21a. Confirmation and Reminders By Location

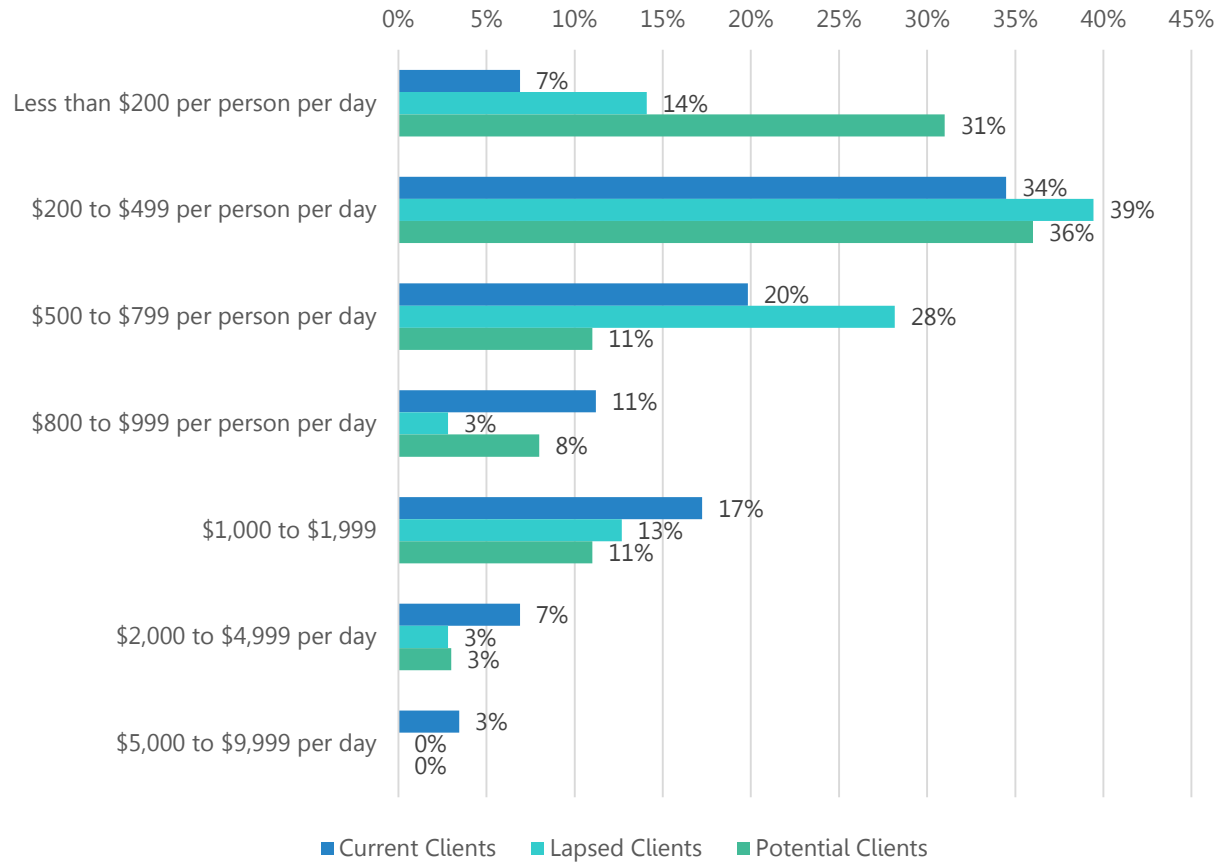


Both Australian and International Clients expect to receive a confirmation email at the time of booking.
 International Clients are also more likely to expect to receive a reminder email a few days prior to the booking (51%).

A21a. And once you have your charter boat fishing trip booked, which of the following would you expect to receive?
 All Respondents, n=707, presented by Location

Bookings and Payments – Expected Cost Multi-Day By Client Type

A25. Expected Costs Per Full Day - Multi-Day Trips By Client Type



Of those intending to undertake a multi-day trip in the future, the expected per full day cost is:

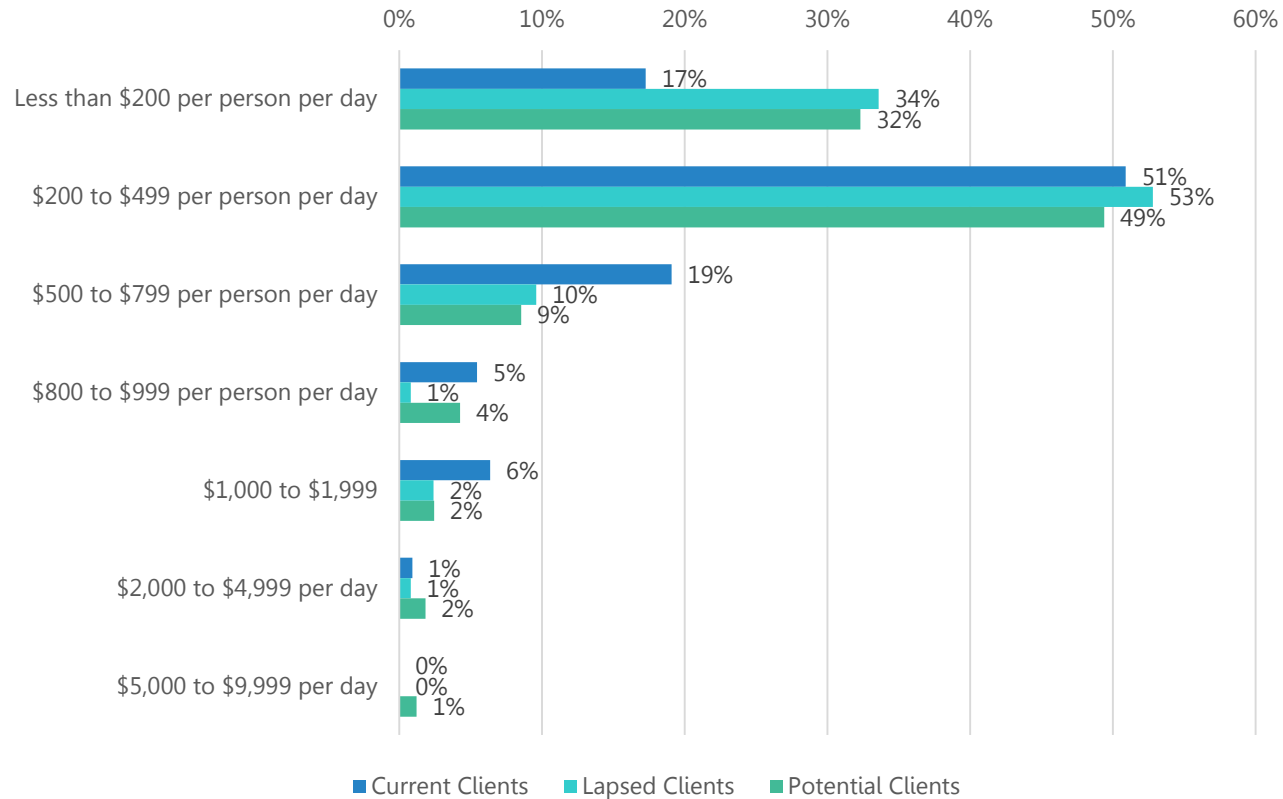
- 54% of Current Clients would expect to pay between \$200 and \$799 per full day (34% between \$200 and \$499 and 20% between \$500 and \$799).
- 67% of Lapsed Clients would expect to pay between \$200 and \$799 (39% between \$200 and \$499 and 28% between \$500 and \$799).
- 67% of Potential Clients would expect to pay under \$500 per full day (31% less than \$200 and 36% between \$200 and \$499 per full day).

A25. And how much per person per a full day trip would you expect to pay for a charter boat fishing trip?

All those intending to undertake a multi-day charter boat trip in future, n=287, presented by Client Type

Bookings and Payments – Expected Cost Single-Day By Client Type

A25. Expected Costs Per Full Day - Single-Day Trips By Client Type



Of those intending to undertake a single-day trip in the future, the expected per full day cost is \$200 to \$499 for all Client Types.

A25. And how much per person per a full day trip would you expect to pay for a charter boat fishing trip?

All those intending to undertake a single-day charter boat trip in future, n=399, presented by Client Type

Bookings and Payment Summary

CURRENT & LAPSED CLIENTS (63% of sample)

- Expect to **call operator directly** or visit **operator's website** to make a booking.
- Expect to make some form of payment up front, most likely a **deposit with full payment due on the day of the trip**
- Expect to make payment **via credit card/debit card**
- Expect to receive a **confirmation email at the time of the booking**

POTENTIAL CLIENTS (37% of sample)

- Expect to **call operator directly**, visit **operator's website** to make a booking or **through a booking website** that offers a range of your options.
- Expect to make some form of payment up front, most likely a **deposit with full payment due on the day of the trip**
- Expect to make payment **via credit card/debit card**
- Expect to receive a **confirmation email** and expect to received a **reminder email a few days prior to the booking.**

AUSTRALIAN CLIENTS (79% of sample)

- Expect to **call operator directly** or visit operator's website to make a booking.
- Expect to make some form of payment up front, most likely a **deposit with full payment due on the day of the trip**
- Expect to make payment **via credit card/debit card**
- Expect to receive a **confirmation email at the time of the booking**

INTERNATIONAL CLIENTS (21% of sample)

- Expect to make booking online either **through operators website** or **through a booking website.**
- Expect to make some form of payment up front, most likely to **pay the full amount up front.**
- Expect to make payment **via credit card/debit card**
- Expect to receive a **confirmation email at the time of the booking** and to receive a **reminder email a few days prior to the trip.**

Operators need to ensure they are offering a convenient option to book by matching and exceeding client's booking and payment expectations.

As a minimum, all operators should offer:

- An ability to book through their own website, or via a direct phone call.
- Payment to be made via credit card/debit card at the time of the booking.
- A confirmation email once the booking has been made.
- A reminder email sent a few days prior to the trip.

Other Activities

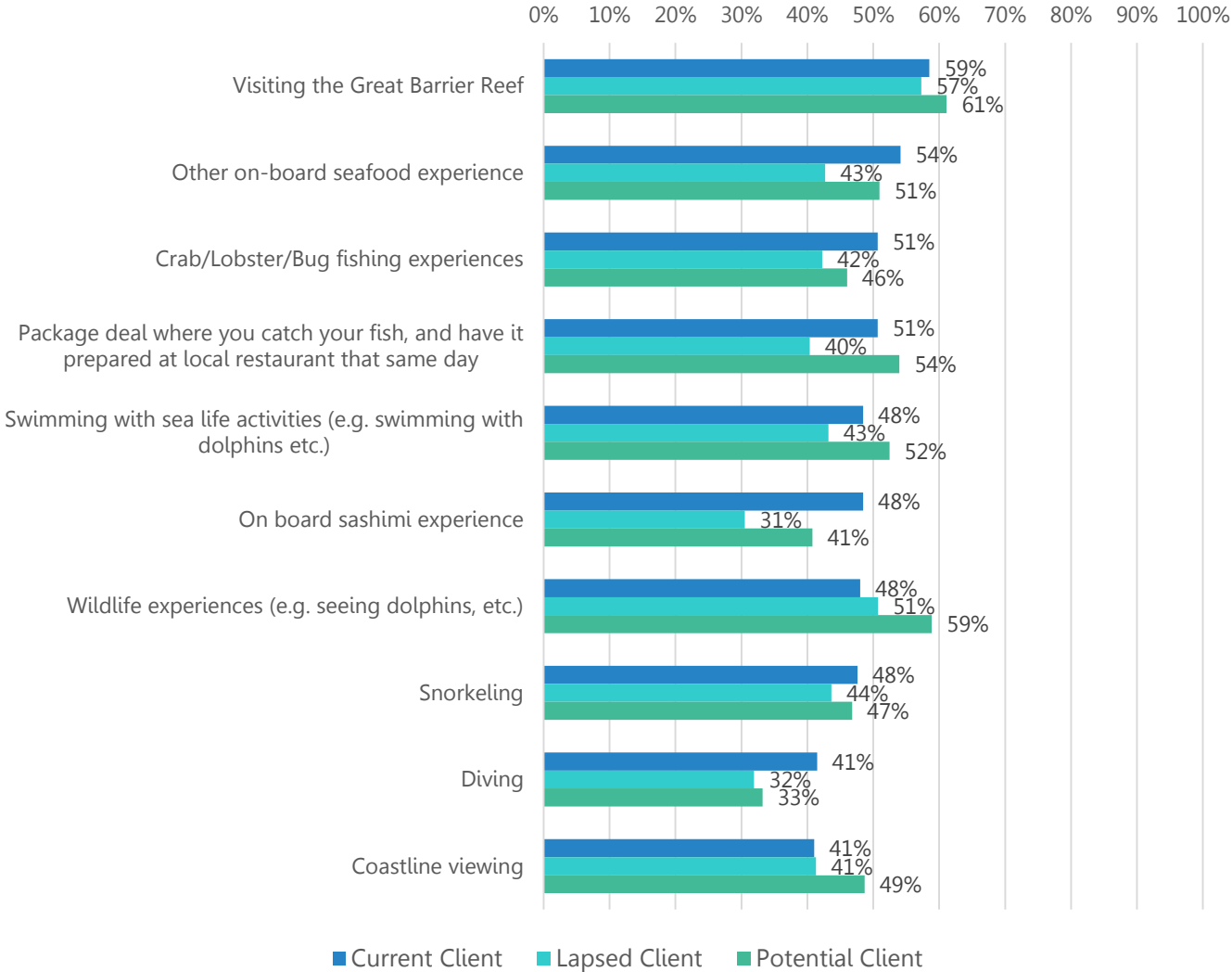
A26. Other activities (Top of Mind)	Current Clients	Lapsed Clients	Potential Clients
None, just fishing	64%	63%	62%
Snorkelling / Diving	6%	6%	10%
Meals/catering provided as part of experience	5%	5%	10%
Sight seeing, scenery, cruising	3%	5%	5%
Wildlife experiences (dolphins, whales)	2%	3%	3%

Fishing is clearly the main purpose for undertaking a charter boat fishing trip.

Other activities that are the most appealing include:

- Visiting the Great Barrier Reef (top for all client types).
- Other on-board seafood experiences (more appealing for Current Clients).
- Wildlife experiences (more appealing for Lapsed and Potential Clients).
- Package deal where you catch your fish and have it prepared at local restaurant that same day (appealing for Current and Potential Clients).

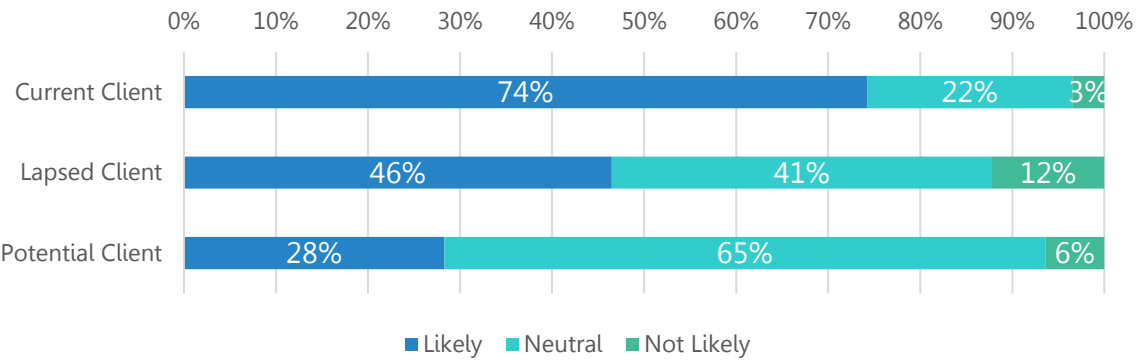
A27. Appeal of other activities - By Client Type



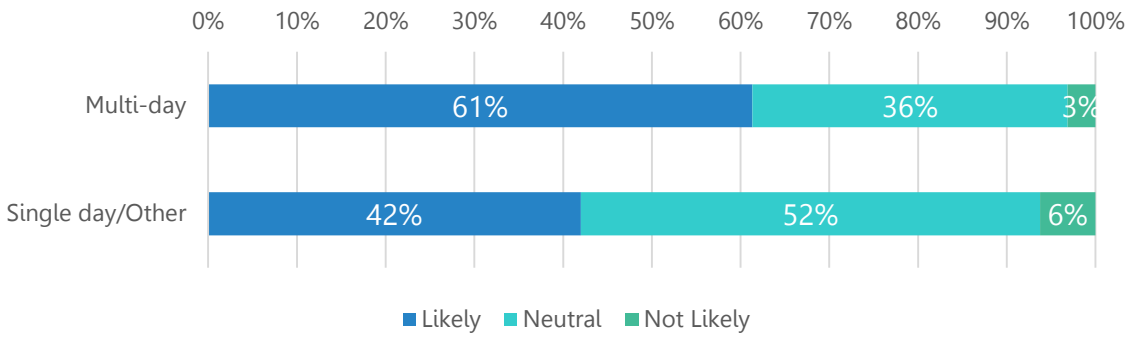
A26. Top of mind activities (unprompted) and A27. Below are a range of other activities that could possibly be offered on a charter boat fishing experience. How appealing is each of these to you? All Respondents, n=707, Results presented and Appealing % = 8, 9 or 10

Likelihood To Undertake Future Charter Boat Trip in Queensland

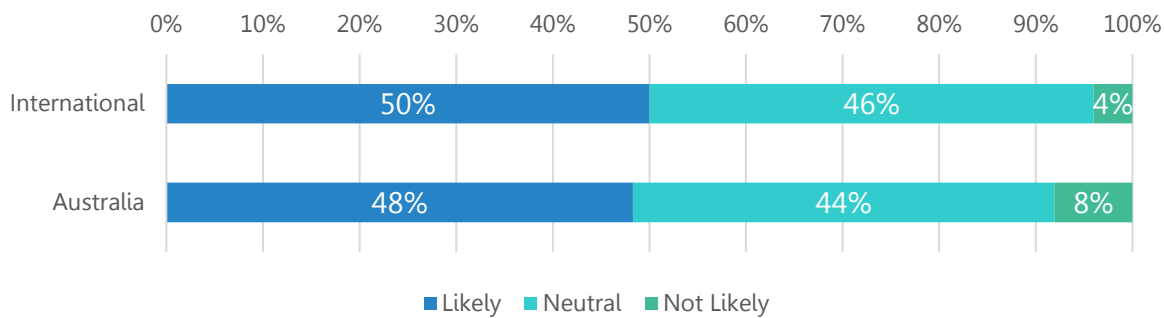
A24. Likelihood to undertake future charter boat trip in Queensland by Client Type



A24. Likelihood to undertake future charter boat trip in Queensland by Trip Type



A24. Likelihood to undertake future charter boat trip in Queensland by Location



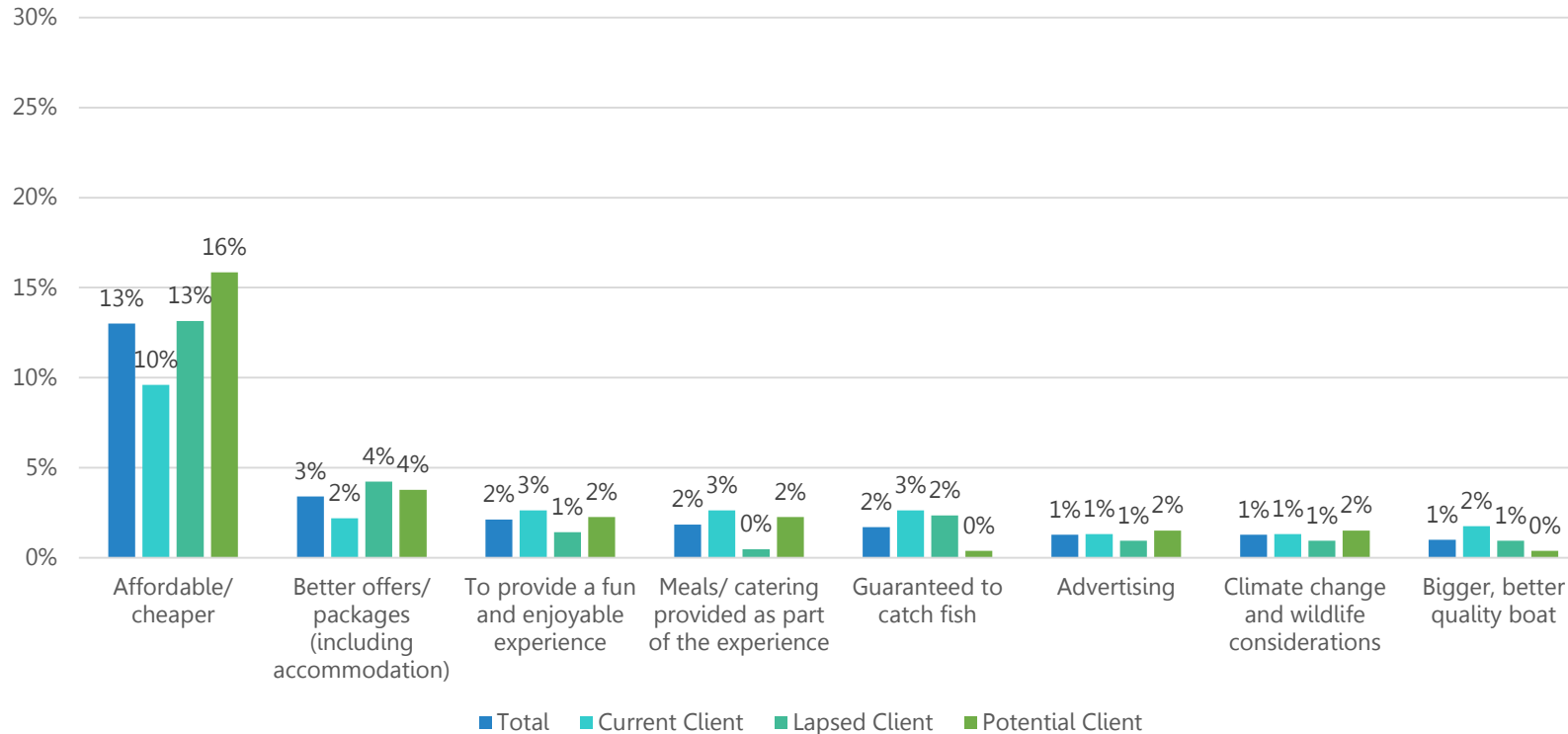
Likelihood to undertake a future Charter Boat trip in Queensland is highest among:

- Current Clients (74%)
- International (50%) and Australian Clients (48%)
- Those interested in undertaking multi-day experiences (61%).

A24. How likely are you to take a charter boat fishing trip in Queensland within the next three years?
 All Respondents, n=707, Likely % = 8, 9 or 10, Neither % = 3, 4, 5, 6 or 7 and Not Likely % = 0, 1 or 2

One Thing To Increase Likelihood Of Future Trips

A28. One thing to increase likelihood of trips



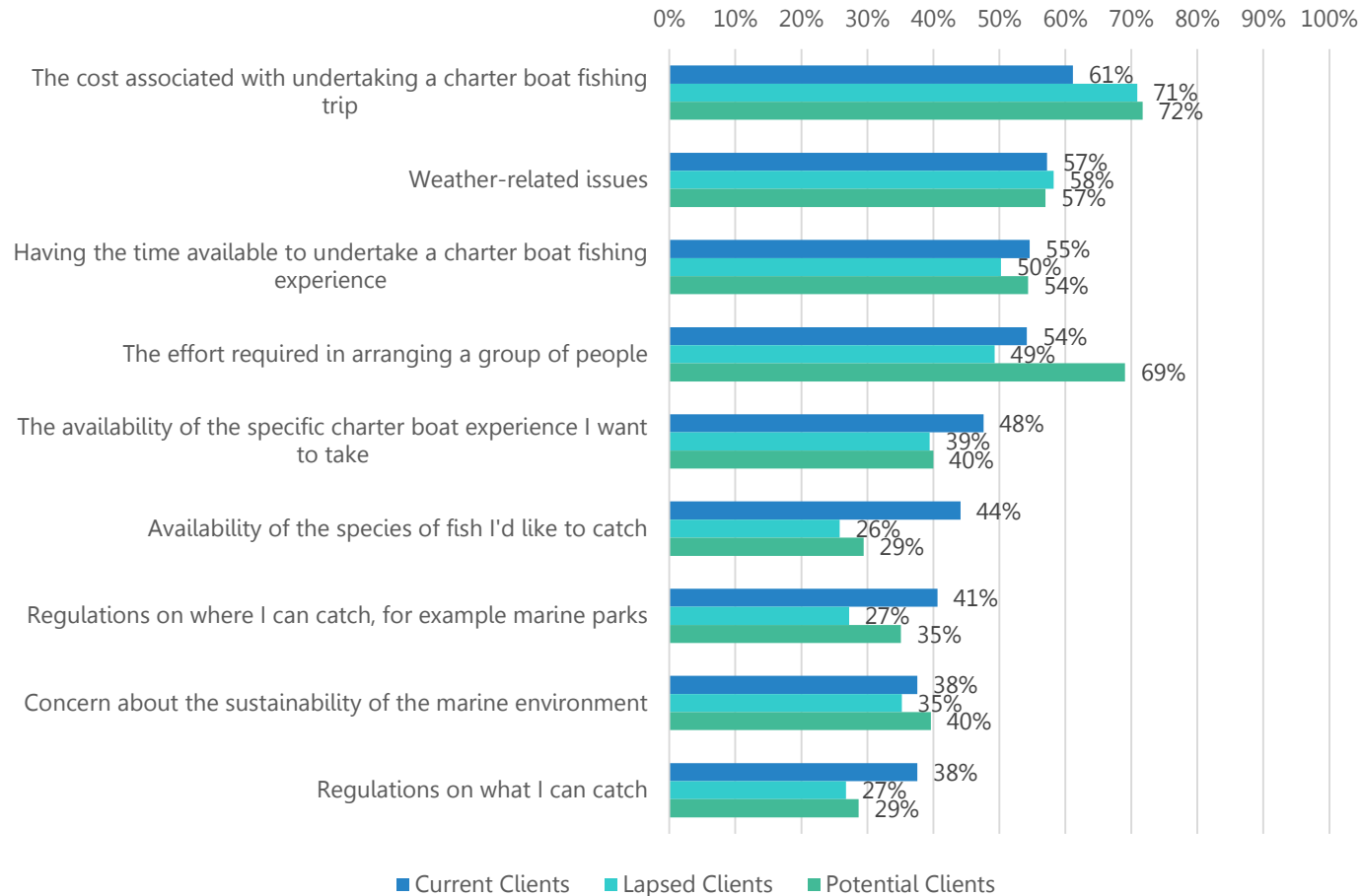
Overall, the one thing the industry could do to increase the number of future trips would be to reduce the cost (13%).

This is more of a concern for the Lapsed (13%) and Potential Clients (16%), and lower for Current Clients (10%).

A28. What is the one thing the charter boat fishing industry could do to make you more likely to take trips in the future?
All Respondents, n=707

Barriers to Undertaking Charter Boat Fishing Trips

A13. Barriers to Undertaking Charter Boat Fishing Trips By Client Type



Overall, the **cost associated with undertaking a charter boat trip is the biggest barrier** with over 60% of all respondents considering this to be a barrier.

The other top issues include weather related issues and having the time available.

For Potential Clients, the effort required in arranging a group of people much more of a barrier than it is for Current and Lapsed Clients.

The regulations on where and what can be caught are no real barriers to undertaking charter boat fishing trips.

A13. Below is a list of potential barriers to you undertaking a charter boat fishing trip. Please rate each as 'major barrier', 'minor barrier' or 'no real barrier'. All Respondents, n=707, results presented are Total Barrier = Major + Minor Barrier %

Summary and Conclusions 1

Satisfaction, Recommendation and Importance of Charter Boat trips to overall trip

- Overall, most are satisfied with their most recent charter boat fishing trip with satisfaction being higher for Current Clients (72%) than Lapsed Clients (57%).
- International Clients (77%) are more satisfied than Australian Clients (62%), and those who intend to undertake a multi-day trip (77%) are more satisfied than those who intend to undertake a single-day trip (59%).
- The overall Net Promoter Score is +18, indicating those who have been on a charter boat fishing trip are more likely to talk positively than negatively about the experience. The result is higher for Current Clients (+36) than Lapsed Clients (-1). International Clients have a much higher NPS (+61) than Australian Clients (+10). Similarly, those intending to undertake a multi-day trip have a much higher NPS (+41) than those who intend to undertake a single-day trip.
- Word of mouth is of critical importance to promoting the Charter Boat industry. The Net Promoter Score is a key indicator as to whether the word of mouth stories told are positive or negative, and the aim must be to lift this score as high as possible.
- Charter boat trips play an important part in the decision making around overall visitation to Queensland, and is most important for Current Clients (69%), International Clients (68%) and those intending to undertake a multi-day trip (75%).

Important Trip Elements, and Performance

- The top 3 most important charter boat trip elements are common among all client types and include the quality of the skipper/crew, to provide a safe experience, and to provide a fun and enjoyable experience.
- Current Clients consider the majority of elements tested to be performing above their expected level of importance. Out of the 20 attributes tested, 17 are performing above the expected level of importance. Those elements that can be improved for Current Clients include the quality of the skipper/crew, to catch fish, and to provide a fun and enjoyable experience.
- For Lapsed Clients, there are several elements where the performance is below expected levels including providing a safe experience, the quality of the skipper/crew, to provide a fun and enjoyable experience, to catch fish, the quality of the vessel and amenities, and for the fish to be caught in a sustainable way.

Summary and Conclusions 2

Bookings and Payments

- Clients are expecting to be able to book either via the operator's website, or via a phone call directly with the operator. Potential Clients and International Clients also expect to be able to book through a booking website that offers a range of tour options.
- All clients expect to make some form of payment up front, with most expecting to make a deposit with full payment due on the day of the trip itself, and the International Clients expect to make full payment up front.
- All clients to be able to pay via credit card/debit card.
- Once the booking is made, the majority of clients expect to receive a confirmation email, and Potential Clients and International Clients would expect a reminder email a few days prior to the trip itself.

Likelihood to Book Future Trip, Expected Cost, and Other Activities and Barriers

- 74% of Current Clients, 46% of Lapsed and 28% of Potential Clients are likely to undertake a charter boat fishing trip within the next three years. The likelihood is higher among International Clients (50%) and those intending to undertake multi-day trips (61%).
- The average expected costs for all trip types is between \$200 and \$499 for a full day.
- Additional activities of interest include visiting the Great Barrier Reef, providing on-board seafood experiences, and wildlife experiences.
- The one thing that could be done to improve the number of charter boat trips taken is to improve affordability (13%).
- The biggest barriers to clients undertaking a charter boat fishing trip are the cost to do so, weather-related issues and having the time available to undertake a trip. Potential clients find the effort required to arrange a group of people together to be a key barrier.

**Action Market Research & Hudson Howells Partnership
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