TOURISM QUEENSLAND

Great Keppel Island Visitor Survey
– Final Report –

April 2003

Report prepared by the Tourism Queensland Research Department

Contents

1 Introduction

The Great Keppel Island Visitor Survey was undertaken by the Tourism Queensland Research Department to assist in developing a better understanding of the existing market (or markets) for Great Keppel Island.

The overall outcome of the research is to help guide the development of Great Keppel Island. It is anticipated that information gathered from this research will be used by Tourism Queensland, Capricorn Tourism and Development Bureau, government and tourism operators to maximise tourism in the area and to provide input into future directions and marketing strategies.

The specific objectives of the research are:

- to profile visitors to Great Keppel Island in terms of demographics and travel behaviour;
- to measure visitor satisfaction and appeal with specific aspects of Great Keppel Island; and
- to identify differences in the profile and opinions of visitors at different time periods.

This report presents the findings of the 2003 Great Keppel Island Visitor Survey, which is the second wave of this study in the Great Keppel Island area. Results from the July 2002 wave are also presented within this report where appropriate, for the purpose of comparison.

2 Methodology

The questionnaire used for the study was designed by Tourism Queensland and is based on the Standard Visitor Survey. The questionnaire included questions about visitor origin, trip purpose, level of repeat visitation, appeals, activities, satisfaction and demographics.

The survey period for wave one commenced on 8th July to 5th August 2002, coinciding with some interstate school holidays (throughout the report, wave one is referred to as July 2002). In total, 241 surveys were completed for wave one. The survey period for wave two commenced on Saturday 12th April to Tuesday 20th May 2003 between the hours of 8:30am and 6pm (throughout the report wave, two is referred to as April 2003). The interviewing period for the current wave coincided with the Easter long weekend (18th to 21st April), the Anzac Day long weekend (25th to 27th April), Queensland school holidays (18th to 28th April), New South Wales and Victorian school holidays (12th to 27th April), and Beef Australia 2003 (an Australian beef cattle expo held in Rockhampton from 26th April to 4th May). In total, 165 surveys were completed for wave two.

Local volunteers, who were recruited by Capricorn Tourism and Development Bureau and trained by Tourism Queensland Research staff, conducted the interviews. Interviewers recruited respondents by randomly intercepting passers-by at various locations around Great Keppel Island.

Data from all completed questionnaires was entered into a database and prepared for analysis. Analysis was undertaken using *SPSS* statistical analysis software and includes frequencies and means comparisons.

The results are presented graphically in tables and graphs supplemented with written comment and interpretation. Only top-line (whole sample) results are presented, due to sample size.

3 Top Line Findings

This section presents the top line findings of the April 2003 Great Keppel Island Visitor Survey. The findings are presented in an order considered appropriate and relevant to the client's needs and not necessarily in the order questions were asked of respondents. Results from the July 2002 wave are also presented where appropriate for comparison.

3.1 Visitor Details

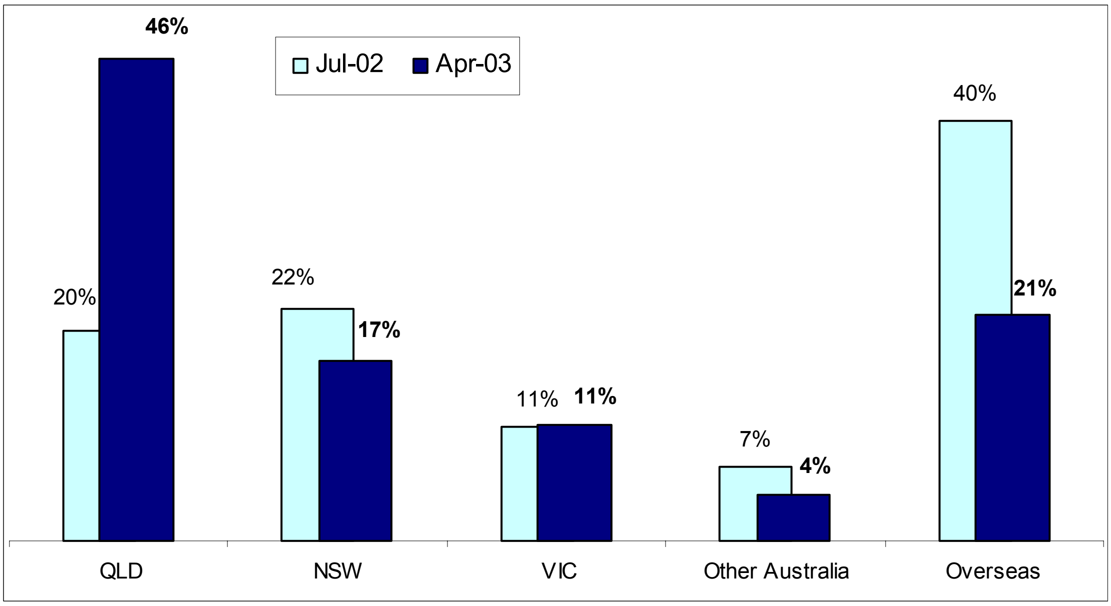
The survey included a number of questions about respondents.

3.1.1 Source Markets

Almost half of the respondents are from Queensland (46%). One-third of respondents are from areas of Australia outside of Queensland (32%), with the remaining one in five visiting from overseas (21%).

Compared with July 2002, there is a considerably higher proportion of respondents from Queensland and only half as many overseas visitors.

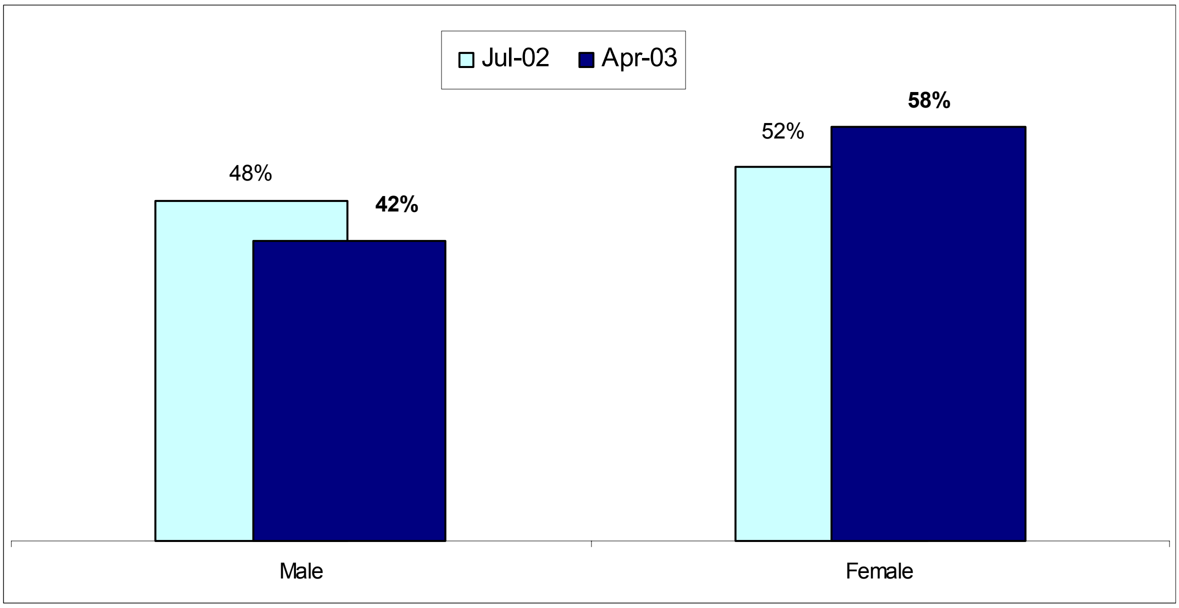
Origin



3.1.2 Sex

More females (58%) than males (42%) were interviewed.

Sex

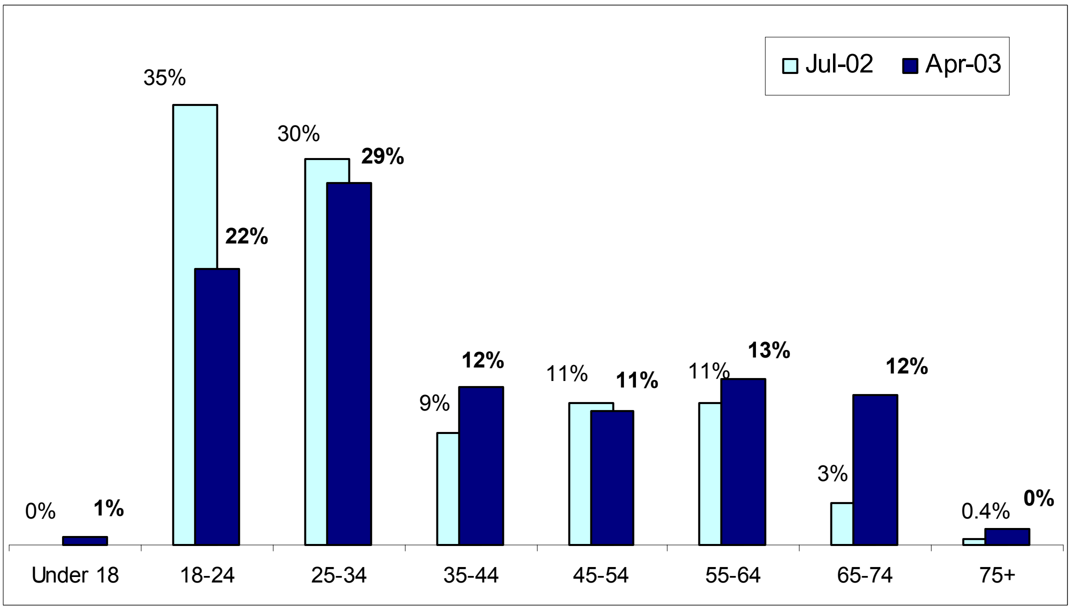


3.1.3 Age

There is a range of ages represented within the sample group, although the 18-34 age group represents more than half of the total respondents (51%).

In the July 2002 wave there were higher proportions of respondents aged 18-24, and fewer respondents aged 65-74.

Age Group

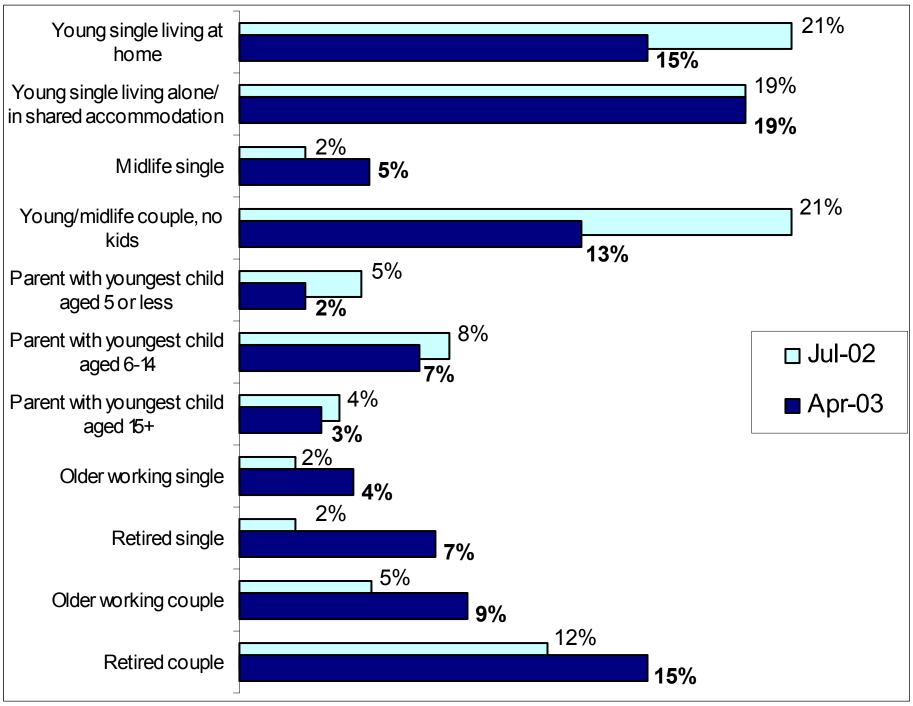


3.1.4 Lifestage

Young to midlife singles and couples constitute the largest proportion of the sample (52%). There is also a high proportion of older singles and couples (35%).

Compared with July 2002 there is a much smaller proportion of young singles living at home and young/midlife couples with no children. There is also a much higher proportion of older singles and couples.

Lifestage

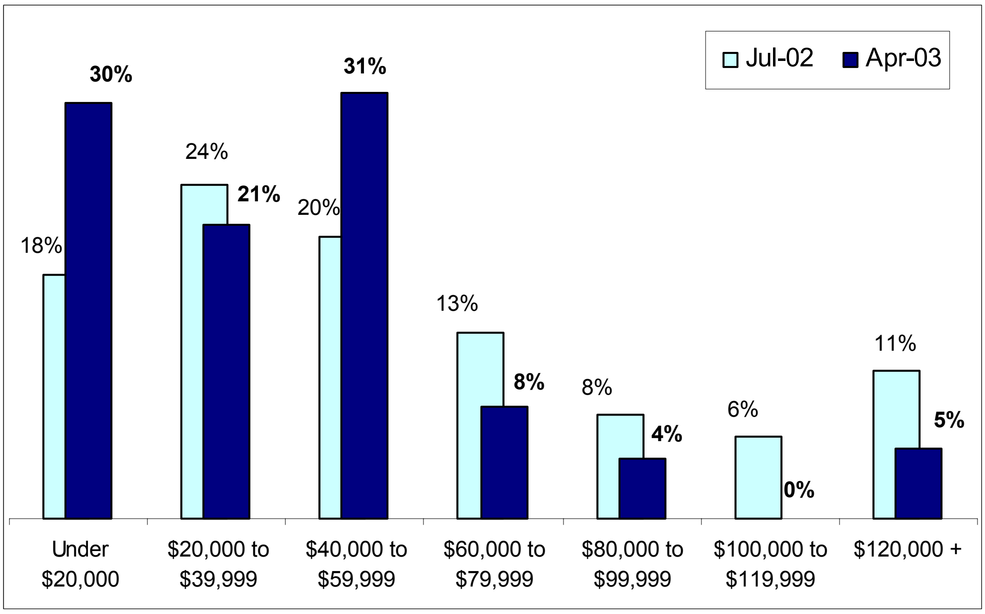


3.1.5 Income

Over half of respondents have an annual household income of less than $40,000 (51%), with a further one-third having a household income between $40,000 and $59,999 (31%).

There is a higher concentration of incomes in the low-range income groups in this wave compared with July 2002.

Household Income



3.2 Details of the Visit

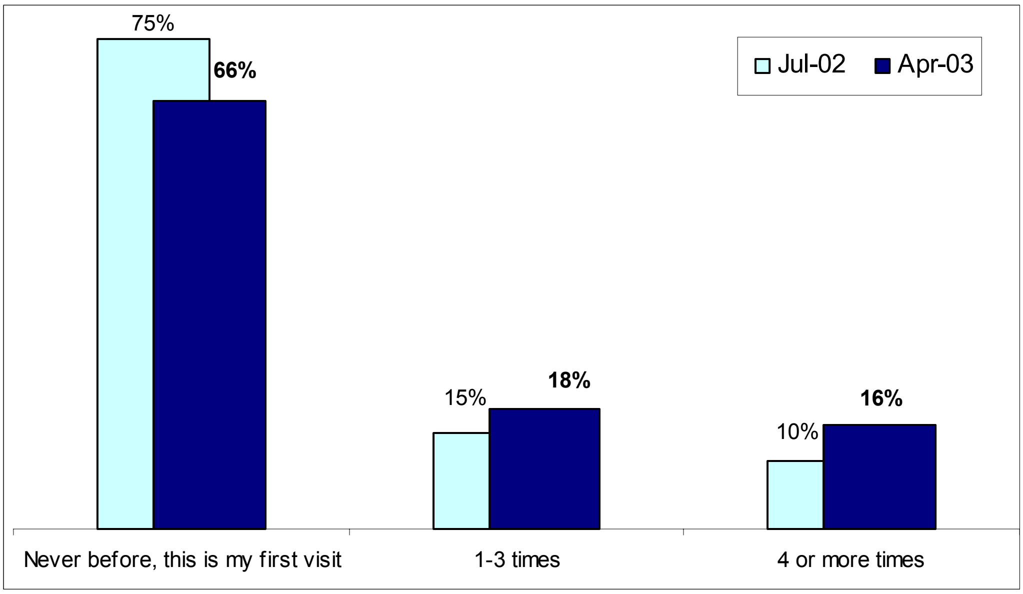
The questionnaire included a number of questions about respondents' current visit to Great Keppel Island.

3.2.1 Previous Visitation

Two-thirds of respondents (66%) were visiting Great Keppel Island for the first time.

This proportion is slightly lower than that found in the July 2002 wave of the study.

Number of Previous Visits to Great Keppel Island

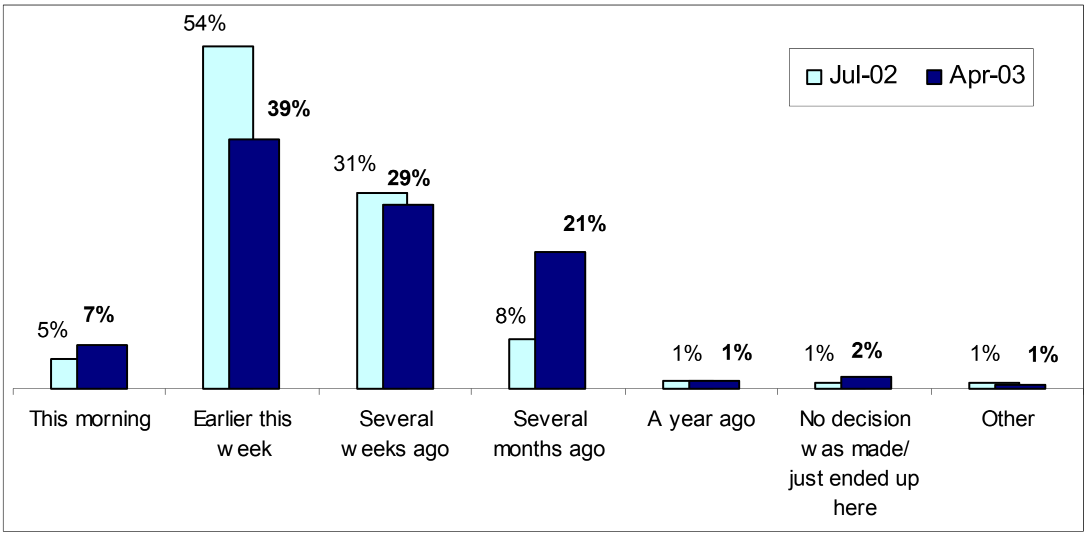


3.2.2 When Decision Was Made to Travel to the Region

Half of the respondents had decided to visit Great Keppel Island several weeks or months prior to their visit (50%). Forty-six percent (46%) of respondents made the decision to visit Great Keppel Island in the same week that they came to Great Keppel Island (either earlier in the week or on the day of the actual visit).

Compared with July 2002, more respondents had made their plans several months ago, and less had made their plans in the same week as their trip.

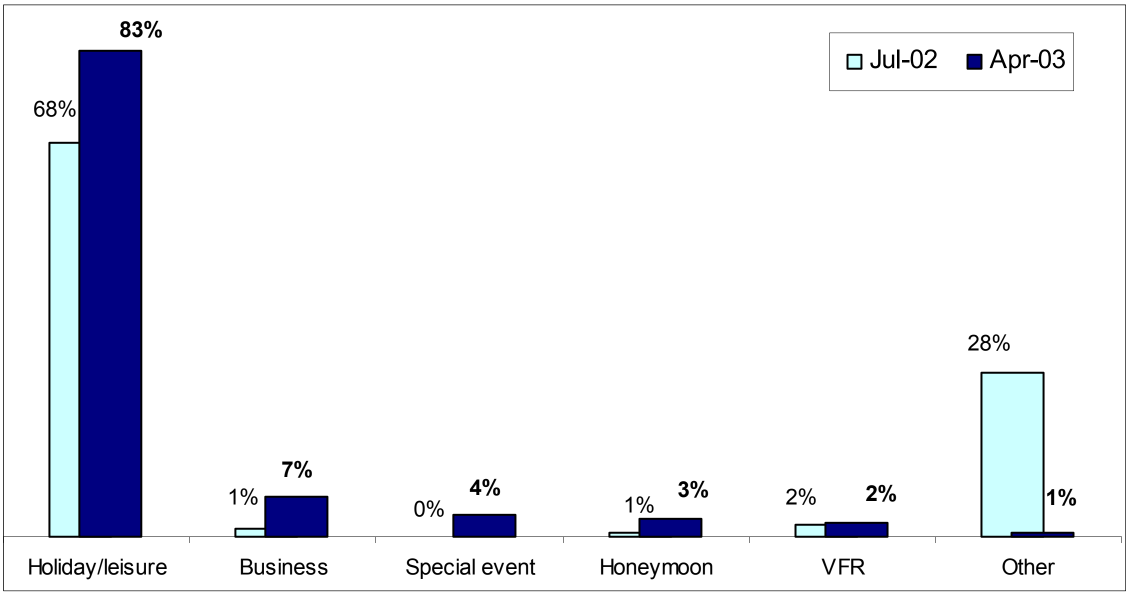
When Decision Was Made to Travel to the Region



3.2.3 Main Purpose

Respondents were asked the main purpose of their trip. Most respondents were visiting for holiday or leisure (83%).

Main Purpose of Trip



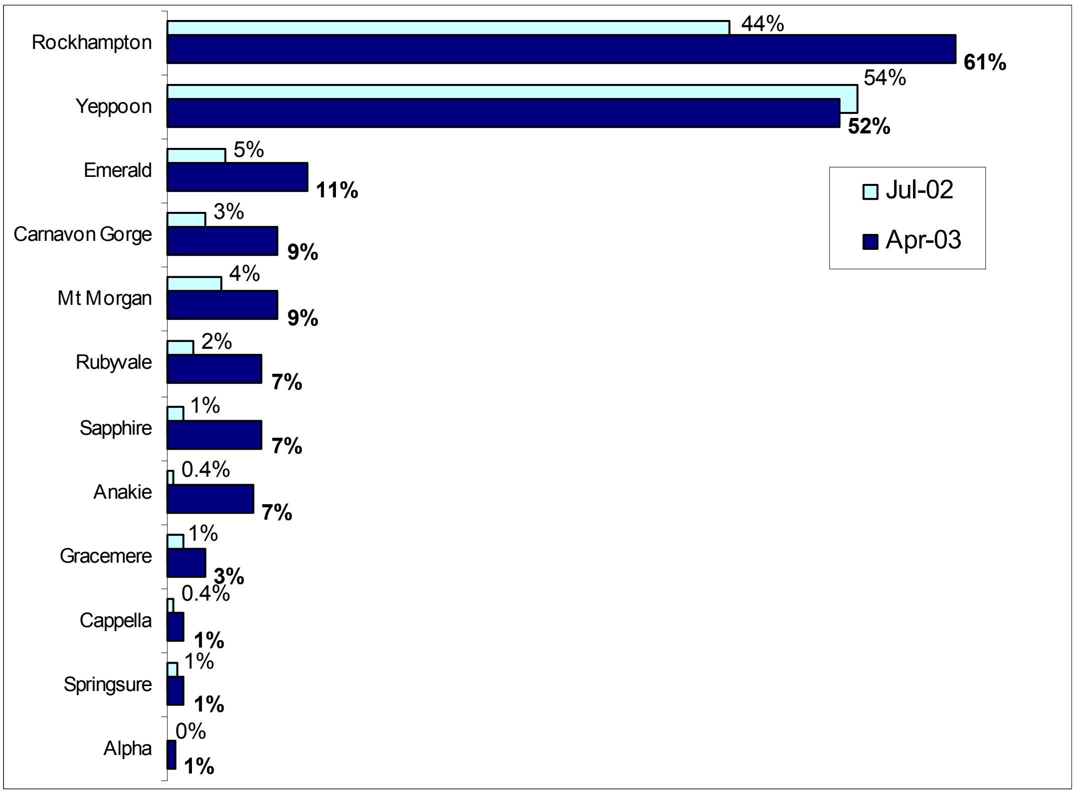
In July 2002 28% of respondents stated that the main purpose of their visit to Great Keppel Island was for a day trip. This option was not asked in April 2003

3.2.4 Other Areas Visited or Planning to Visit in the Region

More than half of those visiting Great Keppel Island have also visited (or plan to visit) Rockhampton on this trip (61%), with a slightly smaller proportion were visiting or planning to visit Yeppoon (52%).

In July 2002, fewer respondents visited or were planning to visit Rockhampton. It is interesting to note that figures have risen for most areas between the two waves of the study.

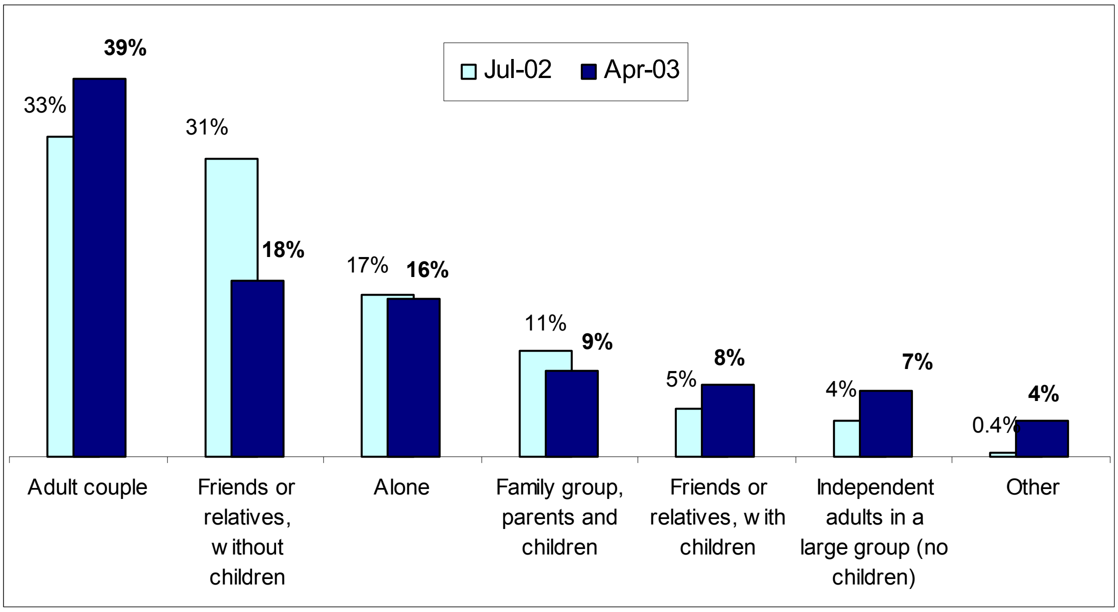
Other Areas Visited or Planning to Visit in the Region



3.2.5 Travel Party

A large proportion of respondents travelled as an adult couple on their visit to Great Keppel Island (39%), and a further eighteen percent (18%) travelled as friends or relatives without children which is much lower when compared with the July 2002 wave of the study.

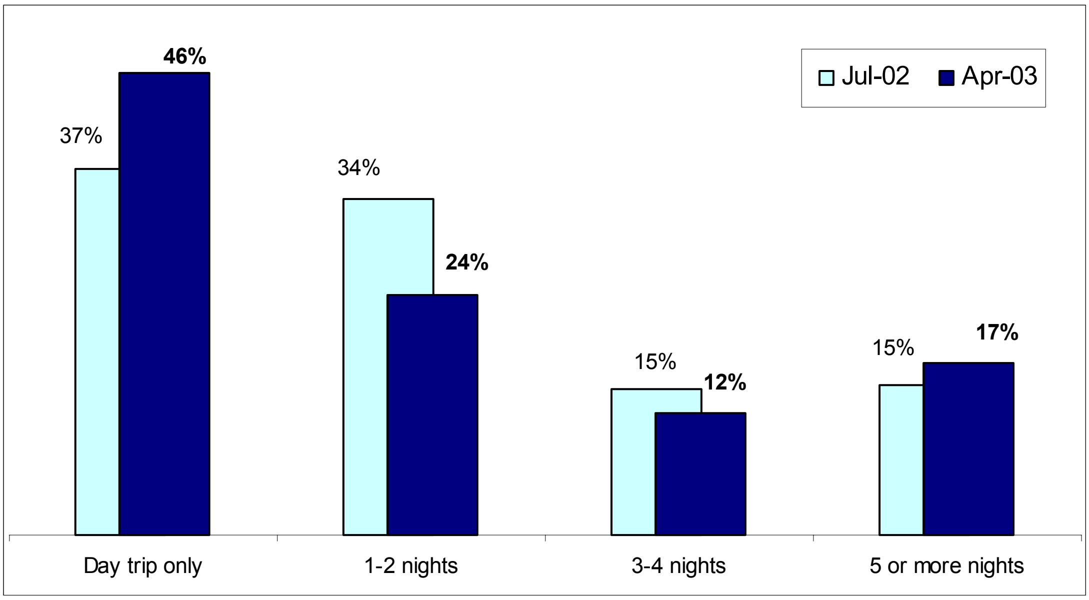
Travel Party



3.2.6 Overnight Stay

Just over half of those interviewed were staying overnight at Great Keppel Island (54%). Most overnight visitors were staying for one to two nights.

Overnight Stay

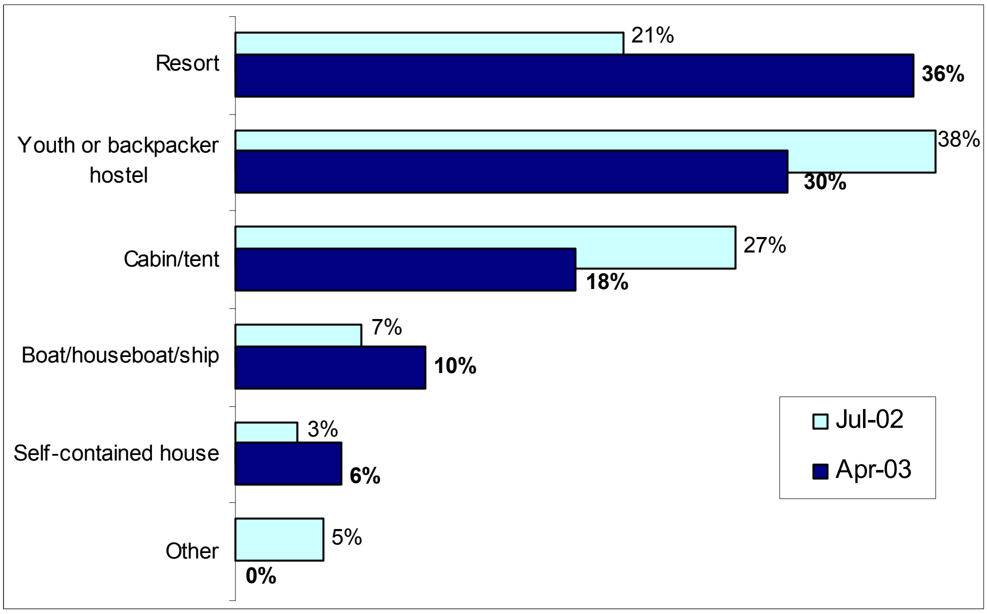


3.2.7 Accommodation

Of those respondents who stayed overnight, the largest proportion stayed in a resort (36%). Another thirty percent (30%) stayed in a youth or backpacker hostel, while eighteen percent (18%) stayed in cabins or tents.

In the July 2002 wave of the study, a larger proportion of respondents stayed in youth/backpacker hostels and cabins and tents, while a smaller proportion stayed in resort style accommodation.

Main Accommodation Used



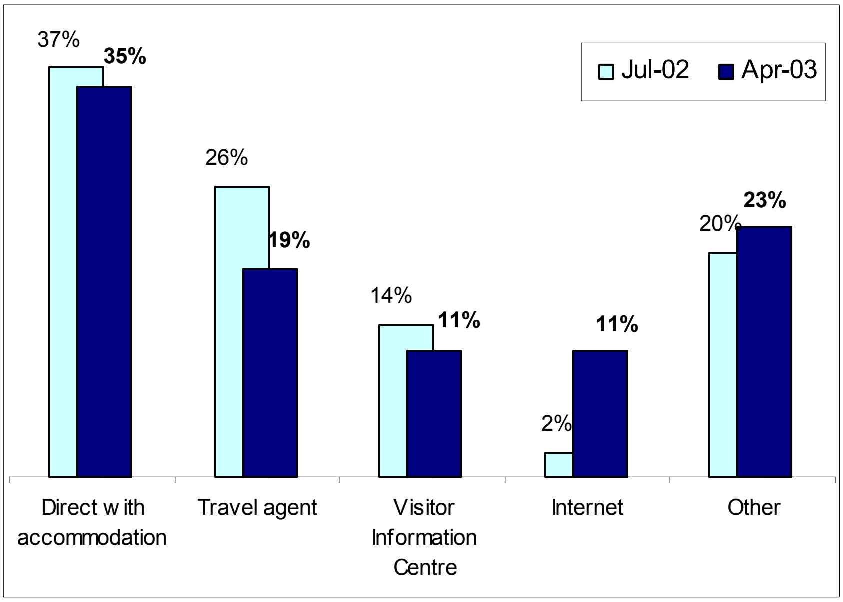
Base: Overnight visitors (n=88)

3.2.8 Booking Accommodation

Only seven percent (7%) of the visitors to Great Keppel Island staying overnight in commercial accommodation did not book prior to their arrival. Of those who had pre-booked accommodation, one-third of the visitors booked their accommodation directly with the accommodation provider (35%).

Compared with July 2002, it appears that a greater proportion of visitors in this wave of the study are booking their accommodation over the internet and less are booking through a travel agent.

How Accommodation Was Booked

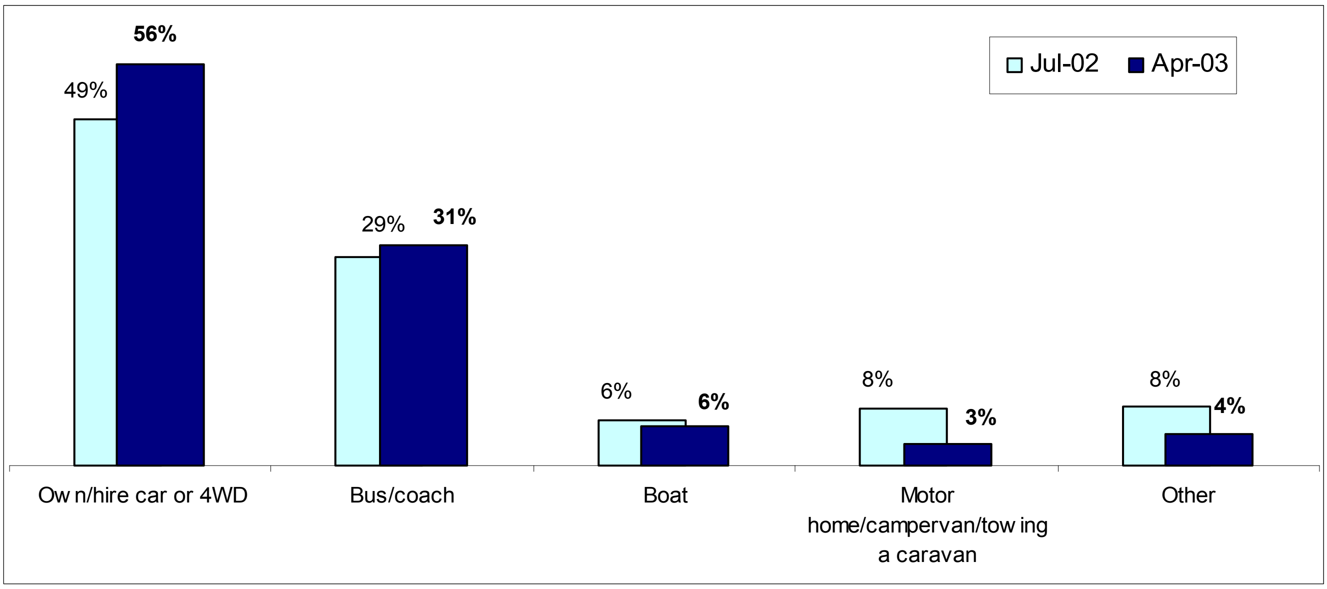


Base: Overnight visitors staying in pre-booked paid accommodation (n=79)

3.2.9 Form of Transportation

Respondents were asked how they travelled the last leg of their journey to Yeppoon before ferrying to Great Keppel Island. More than half of the respondents travelled in their own (or hired) car or four wheel drive (56%), and a further one-third travelled by bus or coach (31%).

Form of Transport Used

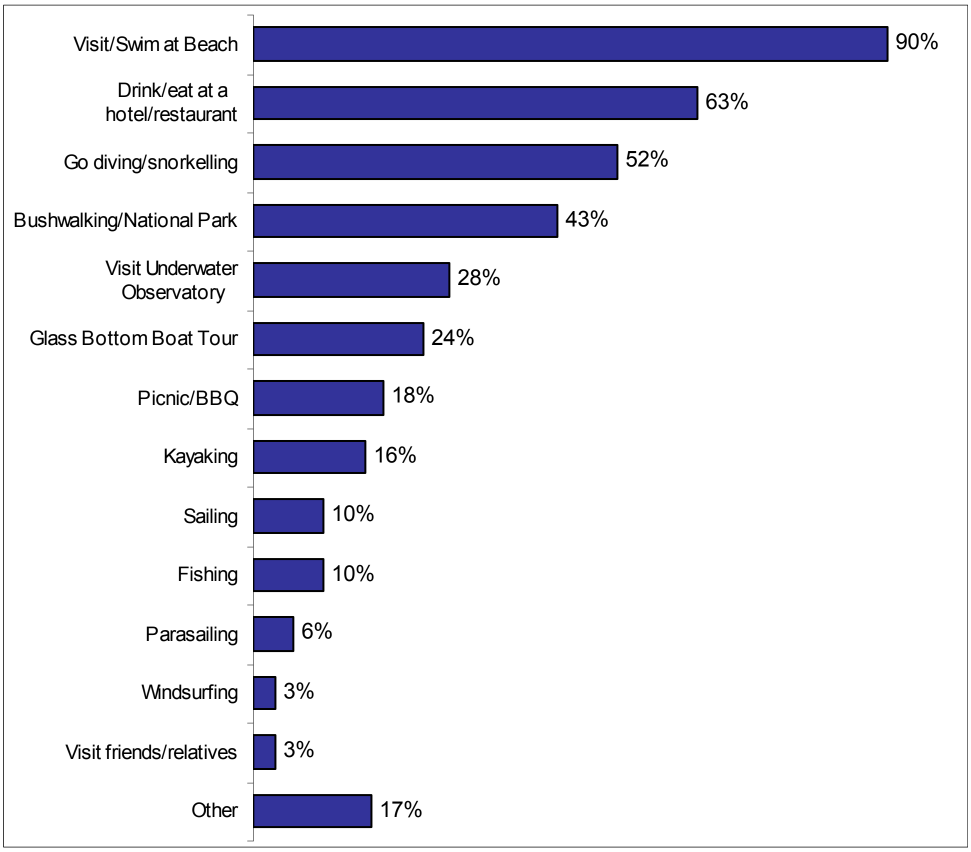


3.2.10 Activities

Respondents were asked what activities they had participated (or planned to participate in) during their stay on Great Keppel Island. It should be noted that interviews were conducted at various locations around Great Keppel Island, and the relative proportions of interviews conducted in each place will affect the number of people who have participated in various activities.

The most popular activities for respondents included visiting/swimming at the beach (90%), drinking/eating at a hotel/restaurant (63%), going diving/snorkelling (52%) and bushwalking or visiting the National Park (43%).

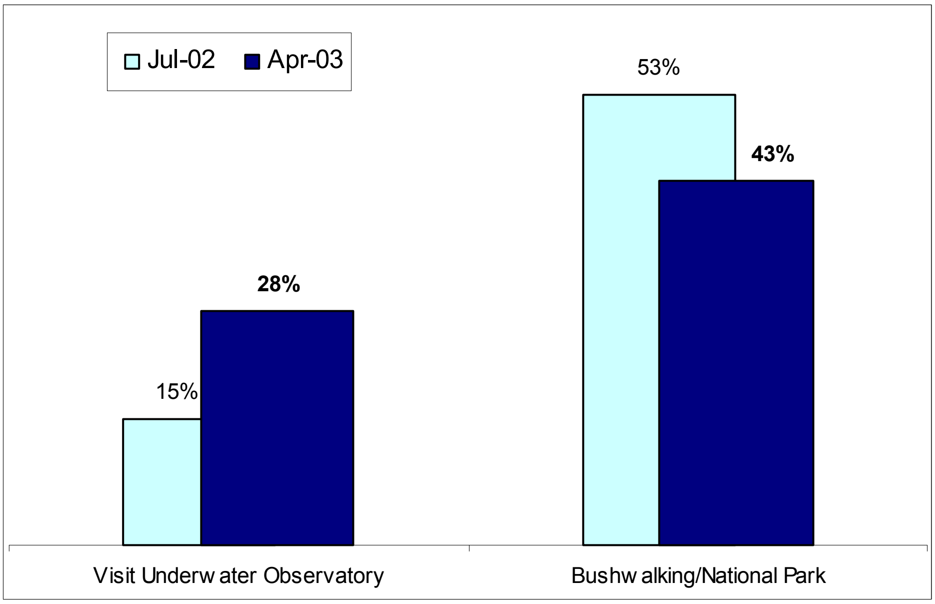
Activities (Apr-03 Only)



Multiple responses accepted
'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents

Visiting the Underwater Observatory appears more popular in this wave of the study compared with July 2002. Bushwalking/visiting the National Park appears less popular in this wave of the study.

Activities – Notable Differences Between July-02 and Apr-03



3.3 Opinions and Satisfaction

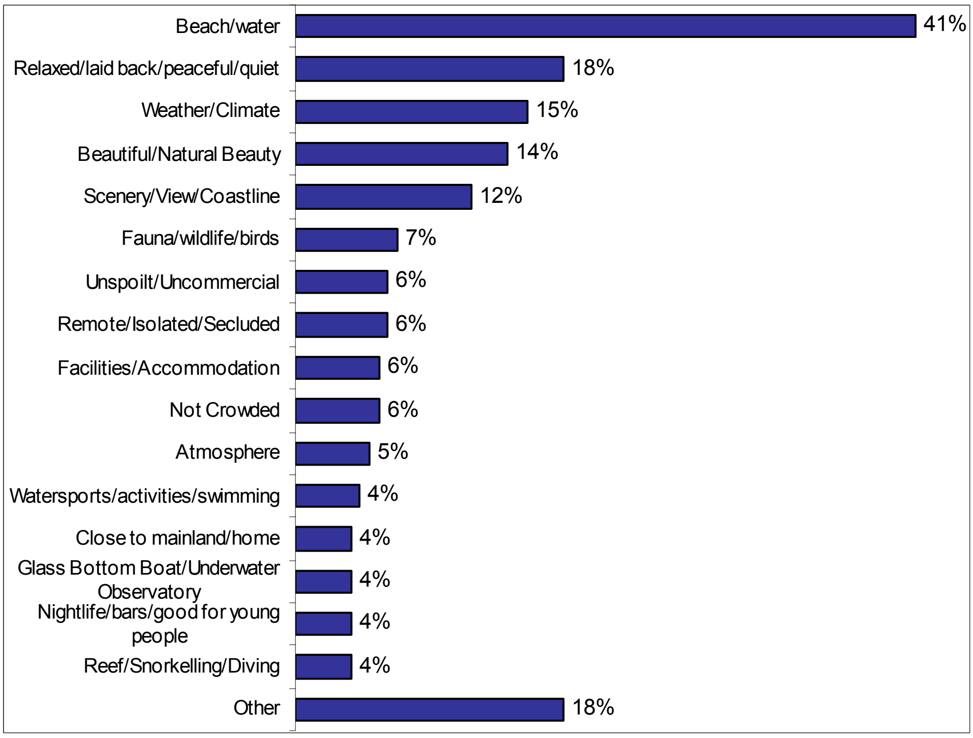
Respondents were asked questions about what aspects of Great Keppel Island they found most appealing and what improvements they think could be made to make the area more enjoyable for visitors. They were also asked to rate their satisfaction with a number of aspects relating to their visit to Great Keppel Island.

3.3.1 Appealing Aspects

Respondents were asked unprompted to reveal the appealing aspects of Great Keppel Island.

Respondents mentioned a range of appealing aspects that Great Keppel Island has to offer. The beach/water was identified as the most appealing aspect of Great Keppel Island (41%). Other commonly mentioned appealing aspects were the relaxed feel (18%), the weather (15%), and the natural beauty (14%).

Most Appealing Aspects (Apr-03 Only)



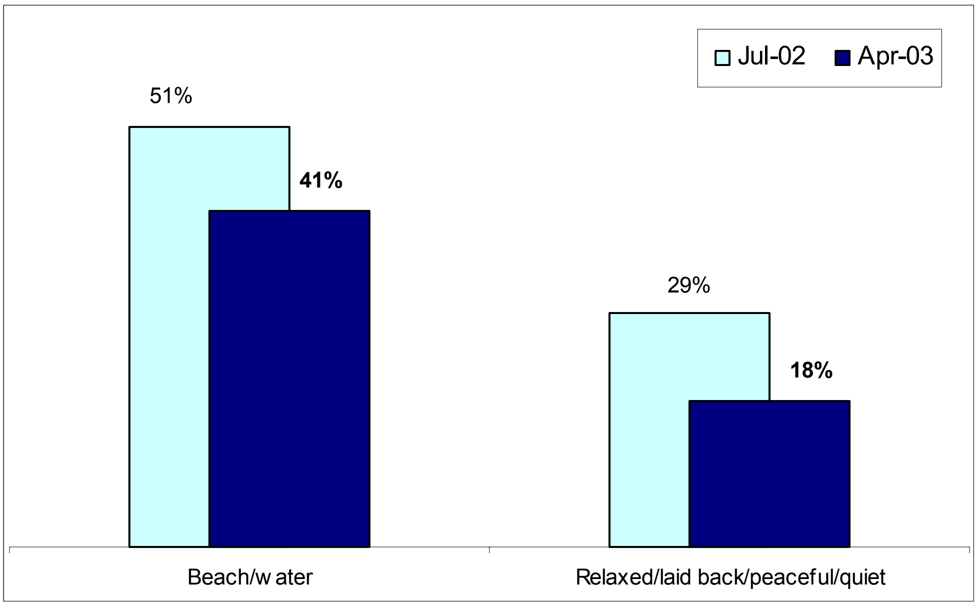
Multiple responses accepted

'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents

See Appendix A for a full list of 'Other' responses

In the April 2003 wave of the study, the beach/water and the relaxed feel were mentioned less frequently as appealing aspects of Great Keppel Island than in the July 2002 wave.

Most Appealing Aspects – Notable Differences Between July-02 and Apr-03

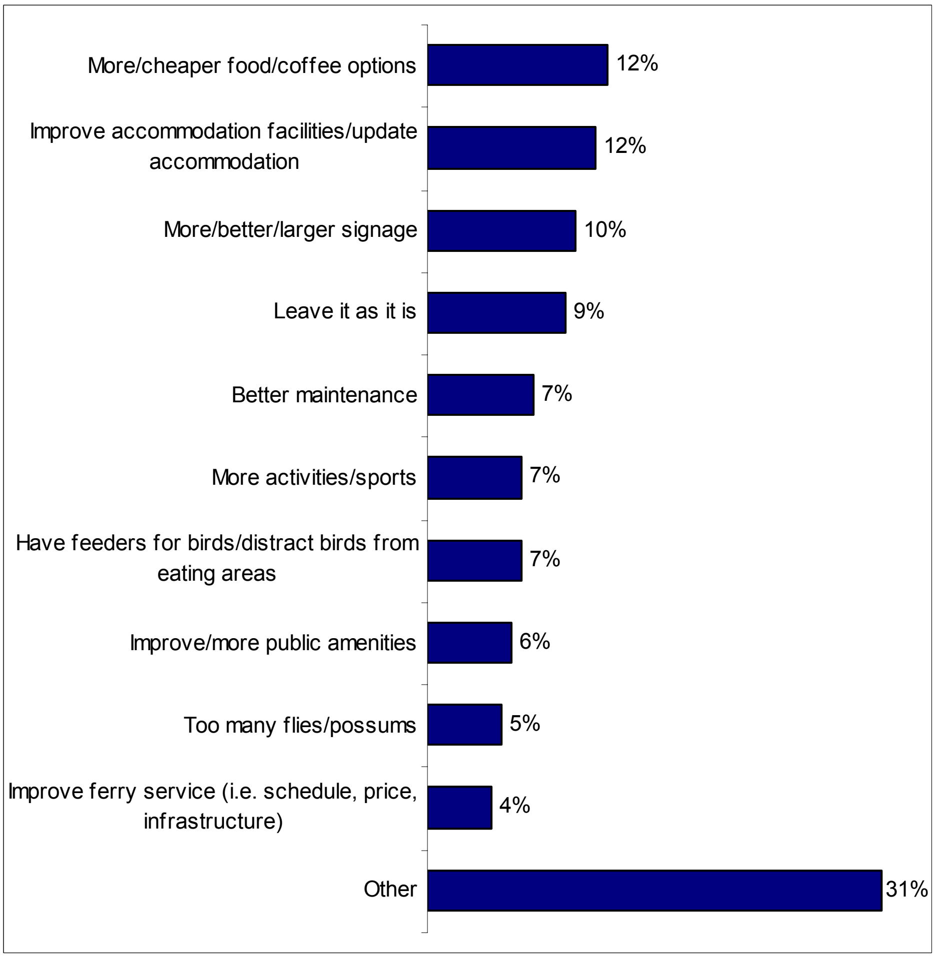


3.3.2 Possible Improvements

Respondents were asked unprompted about the improvements they would like to see to make Great Keppel Island more enjoyable for visitors.

Respondents were generally happy with Great Keppel Island as it is. The most common suggestions were to have more or cheaper food/coffee options (12%), improve or update accommodation and accommodation facilities (12%) and for more/better/larger signage (10%).

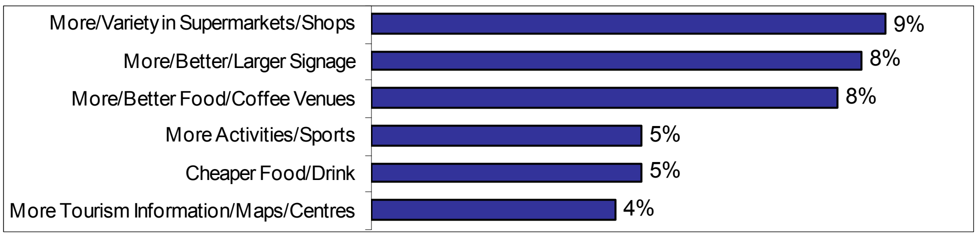
Possible Improvements (Apr-03 Only)



Multiple responses accepted
'Other' consists of a range of responses, each mentioned by fewer than 3% of respondents
See Appendix B for a full list of 'Other' responses

In the July 2002 wave of the study, the most popular suggestions were to have more/variety in supermarkets/shops, more/better/larger signage (8%), and more/better food/coffee venues (8%).

Possible Improvements (Jul-02 Most Mentioned Only)



3.3.3 Visitor Satisfaction

Respondent satisfaction with a number of aspects of Great Keppel Island was measured on a five-point scale where one equals very dissatisfied and five equals very satisfied.

The top five mean ratings were for the quality of beaches (4.84), weather during the visit (4.81), cleanliness of the beaches (4.76), scenery and wildlife (4.75), and also the natural appeal/atmosphere that Great Keppel Island has to offer (4.74).

The bottom five mean ratings were for the range of restaurants (3.42), the price of tours (3.43), signage on Great Keppel (3.48), accommodation quality (3.64), and the value for money in Great Keppel Island restaurants (3.64).

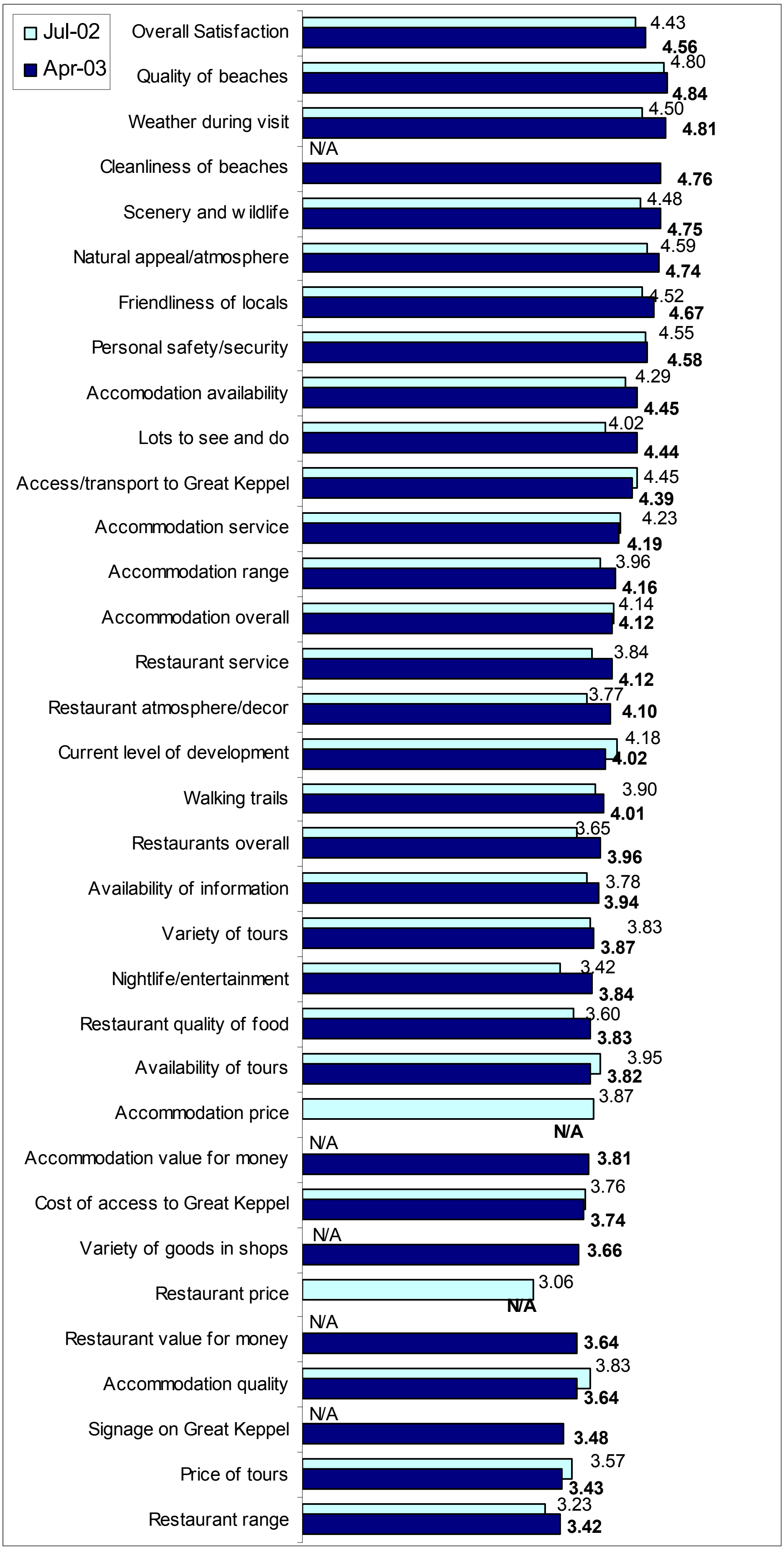
Nearly all respondents were either satisfied or very satisfied with their overall experience on Great Keppel Island (96%), with the remaining 4% being neither satisfied nor dissatisfied.

Satisfaction with Aspects of Great Keppel Island (Apr-03 Only)

	N	Mean	TOTAL Dissatisfied	Very Dissatisfied 1	2	Neutral 3	4	Very Satisfied 5	TOTAL Satisfied
Quality of beaches	160	4.84	0%	0%	0%	1%	13%	86%	99%
Weather during visit	161	4.81	2%	2%	1%	2%	6%	90%	96%
Cleanliness of beaches	161	4.76	1%	0%	1%	2%	16%	81%	96%
Scenery and wildlife	157	4.75	1%	0%	1%	3%	17%	79%	96%
Natural appeal/atmosphere	160	4.74	1%	1%	0%	3%	19%	78%	97%
Friendliness of locals	157	4.67	1%	0%	1%	5%	21%	73%	94%
Personal safety/security	159	4.58	2%	1%	1%	4%	27%	67%	94%
Accommodation availability	78	4.45	1%	1%	0%	12%	27%	60%	87%
Lots to see and do	151	4.44	3%	0%	3%	7%	32%	58%	89%
Access/transport to Great Keppel	160	4.39	3%	1%	2%	10%	33%	54%	88%
Accommodation service	74	4.19	4%	3%	1%	18%	31%	47%	78%
Accommodation range	77	4.16	5%	1%	4%	9%	49%	36%	86%
Accommodation overall	76	4.12	3%	0%	3%	16%	49%	33%	82%
Restaurant service	121	4.12	4%	2%	2%	14%	46%	36%	82%
Restaurant atmosphere/decor	125	4.10	2%	1%	1%	18%	48%	32%	80%
Current level of development	146	4.02	8%	1%	8%	21%	32%	40%	71%
Walking trails	123	4.01	7%	2%	5%	19%	41%	34%	75%
Restaurants overall	124	3.96	3%	2%	2%	24%	44%	28%	73%
Availability of information	152	3.94	8%	2%	6%	24%	32%	36%	68%
Variety of tours	106	3.87	8%	2%	6%	23%	43%	26%	70%
Nightlife/entertainment	86	3.84	8%	3%	5%	29%	30%	33%	63%
Restaurant quality of food	123	3.83	10%	2%	7%	25%	35%	30%	65%
Availability of tours	105	3.82	10%	4%	7%	23%	37%	30%	67%
Accommodation value for money	79	3.81	10%	4%	6%	27%	32%	32%	63%
Cost of access to Great Keppel	152	3.74	14%	5%	9%	21%	36%	29%	64%
Variety of goods in shops	129	3.66	10%	5%	5%	31%	37%	22%	59%
Restaurant value for money	121	3.64	13%	2%	12%	33%	28%	26%	54%
Accommodation quality	78	3.64	9%	3%	6%	41%	24%	26%	50%
Signage on Great Keppel	157	3.48	16%	3%	13%	37%	28%	19%	47%
Price of tours	99	3.43	18%	6%	12%	34%	27%	20%	47%
Restaurant range	126	3.42	17%	4%	13%	37%	29%	17%	46%
Overall Satisfaction	**160**	**4.56**	**0%**	**0%**	**0%**	**4%**	**36%**	**60%**	**96%**

Scale: 1= Very Dissatisfied; 5= Very Satisfied

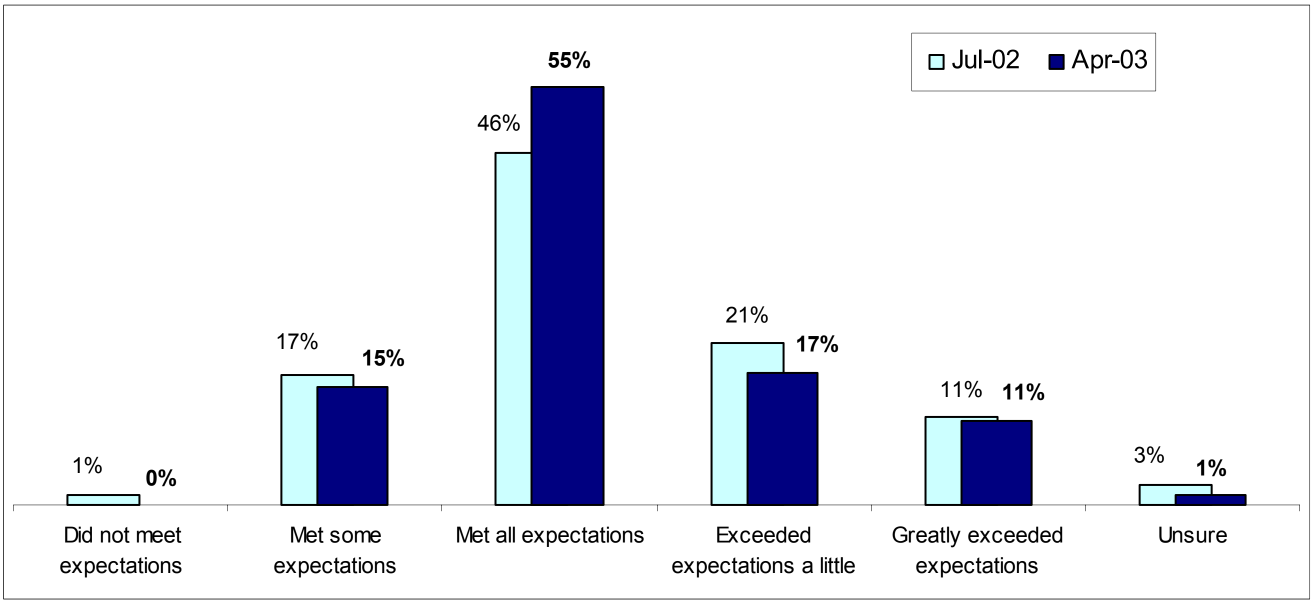
Satisfaction With Aspects of Great Keppel Island (Means)



3.3.4 Expectations

Respondents were asked whether their overall visit to Great Keppel Island met their expectations. Most respondents said that their visit either met or exceeded their expectations (83%). Fifteen percent (15%) of respondents said their trip met only some of their expectations.

Expectations of Visit to Great Keppel Island



4 Key Findings

This section provides a short summary of the key findings from the research.

4.1 Visitor Details

Almost half of the respondents are from Queensland (46%). One-third of respondents are from areas of Australia outside of Queensland (32%), with the remaining one in four visiting from overseas (21%). Compared with July 2002, there is a considerably higher proportion of respondents from Queensland and only half as many overseas visitors.

More females (58%) than males (42%) were interviewed.

There is a range of ages represented within the sample group, although the 18-34 age group represents more than half of the total respondents (51%). In the July 2002 wave there were higher proportions of respondents aged 18-24, and fewer respondents aged 65-74.

Young to midlife singles and couples constitute the largest proportion of the sample (52%). There is also a high proportion of older singles and couples (35%). Compared with July 2002 there is a much smaller proportion of young singles living at home and young/midlife couples with no children. There is also a much higher proportion of older singles and couples.

Over half of respondents have an annual household income of less than $40,000 (51%), with a further one-third having a household income between $40,000 and $59,999 (31%). There is a higher concentration of incomes in the low-range income groups in this wave compared with July 2002.

4.2 Details of the Visit

Two-thirds of respondents (66%) were visiting Great Keppel Island for the first time. This proportion is slightly lower than that found in the July 2002 wave of the study.

Half of the respondents had decided to visit Great Keppel Island several weeks or months prior to their visit (50%). Forty-six percent (46%) of respondents made the decision to visit Great Keppel Island in the same week that they came to Great Keppel Island (either earlier in the week or on the day of the actual visit). Compared with July 2002, more respondents had made their plans several months ago, and less had made their plans in the same week as their trip.

Respondents were asked the main purpose of their trip. Most respondents were visiting for holiday or leisure (83%).

More than half of those visiting Great Keppel Island have also visited (or plan to visit) Rockhampton on this trip (61%), with a slightly smaller proportion visiting or planning to visit Yeppoon (52%). In July 2002, fewer respondents visited or were planning to visit Rockhampton. It is interesting to note that figures have risen for most areas between the two waves of the study.

A large proportion of respondents travelled as an adult couple on their visit to Great Keppel Island (39%), and a further eighteen percent (18%) travelled as friends or relatives without children which is much lower when compared with the July 2002 wave of the study.

Just over half of those interviewed were staying overnight at Great Keppel Island (54%). Most overnight visitors were staying for one to two nights.

Of those respondents who stayed overnight, the largest proportion stayed in a resort (36%). Another thirty percent (30%) stayed in a youth or backpacker hostel, while eighteen percent (18%) stayed in cabins or tents. In the July 2002 wave of the study, a larger proportion of respondents stayed in youth/backpacker hostels and cabins and tents, while a smaller proportion stayed in resort style accommodation.

Only seven percent (7%) of the visitors to Great Keppel Island staying overnight in commercial accommodation did not book prior to their arrival. Of those who had pre-booked accommodation, one-third of the visitors booked their accommodation directly with the accommodation provider (35%).

Respondents were asked how they travelled the last leg of their journey to Yeppoon before ferrying to Great Keppel Island. More than half of the respondents travelled in their own (or hired) car or four wheel drive (56%), and a further one-third travelled by bus or coach (31%).

The most popular activities for respondents included visiting/swimming at the beach (90%), drinking/eating at a hotel/restaurant (63%), going diving/snorkelling (52%) and bushwalking or visiting the National Park (43%).

4.3 Opinions and Satisfaction

Respondents mentioned a range of appealing aspects that Great Keppel Island has to offer. The beach/water was identified as the most appealing aspect of Great Keppel Island (41%). Other commonly mentioned appealing aspects were the relaxed feel (18%), the weather (15%), and the natural beauty (14%).

Respondents were asked unprompted about the improvements they would like to see to make Great Keppel Island more enjoyable for visitors. Respondents were generally happy with Great Keppel Island as it is. The most common suggestions were to have more or cheaper food/coffee options (12%), improve or update accommodation and accommodation facilities (12%) and for more/better/larger signage (10%).

Respondent satisfaction with a number of aspects of Great Keppel Island was measured on a five-point scale where one equals very dissatisfied and five equals very satisfied. The top five mean ratings were for the quality of beaches (4.84), weather during the visit (4.81), cleanliness of the beaches (4.76), scenery and wildlife (4.75), and also the natural appeal/atmosphere that Great Keppel Island has to offer (4.74). The bottom five mean ratings were for the range of restaurants (3.42), the price of tours (3.43), signage on Great Keppel (3.48), accommodation quality (3.64), and the value for money in Great Keppel Island restaurants (3.64).

Nearly all respondents were either satisfied or very satisfied with their overall experience on Great Keppel Island (96%), with the remaining 4% being neither satisfied nor dissatisfied.

Most respondents said that their visit either met or exceeded their expectations (83%). Fifteen percent (15%) of respondents said their trip met only some of their expectations

5 Appendix

5.1 Appendix A – Most Appealing Aspects – 'Other' responses

Most Appealing Aspects	N
Women	2
Package deal	2
Friendliness	1
Bushwalking tracks	1
Walking	1
Great group packages	1
YHA hostel on island cheap pack with Rockhampton YHA	1
Island life	1
Whole package	1
Salt content same as NSW coast	1
Leisureness	1
Can do whatever you want	1
Employment, fishing	1
Off beat	1
Beach shed	1
Restaurant	1
Restaurant, lovely food	1
The coconuts	1
Fishing	1
Rural outlook	1
Smaller	1
Fabulous colours	1
It's cute, it's just cute	1
Educational – orienteering in controlled environment rec appeals to students	1
Spaciousness	1
Food	1
Close enough to not get sea sick	1
The wide open spaces	1
Flora	1
Affordable	1
Nice and clean	1
National park	1
The band	1
Safe for children	1
Not too many people	1

5.2 Appendix B – Possible Improvements – 'Other' responses

Possible Improvements	N
More tourism information/centre	3
Boat jetty/Moorings	3
Nightlife/entertainment	3
Cleaner drinking water	3
Supermarket	1
Souvenirs	1
Thought it would only be for 18-35 year olds	1
Cheap Sundays	1
Noisy generator	1
Whole island is not Contiki	1
Not enough fellas	1
Less car traffic on beach	1
Tyre tracks on beach are biggest disappointment ever seen	1
Ice machine	1
Get rid of Contiki resort, make it more like it was 20 years ago, more yachty	1
Lifeguards, need some on the beach	1
Later breakfasts	1
Kill all stingrays (or at least tell people about them)	1
Market during off-season	1
Update website	1
Resort adv implies whole island 18-35	1
If all the resorts turned off their generators at night	1
Less harassment by government policing authorities	1
More advertising by QLD government; 75% olders never seen the place, communication on boat.	1
Less people	1
Photo imagery	1
Better access from beaches	1
OK for young, not so for old	1
Regular access to other beaches (day-trippers) e.g., quads.	1
Flea market on Sundays	1
It's boring	1
Sea sickness tablets	1
Hills a bit steep	1