Local Satisfaction with Tourism during the COVID-19 Pandemic: ASW Sustainable Tourism Observatory

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Tourism Research Cluster, Curtin University
Methodology:
Questionnaire Development and Data Collection
Structure of the questionnaire

1) Perception about tourist behaviour
2) Perceived impacts of tourism
3) Measures to manage the impact of tourism
4) Perception about number of tourists
5) COVID-19 component
   • Benefits vs risk of certain measures
   • Support for future scenarios
   • Relevance of tourism for economic recovery
6) Demographics
COVID-19 in the questionnaire

- A specific COVID-19 section
  - Risk perceptions
  - Opening of international borders to tourists
- COVID-19 and/or health-related items added to most of the other questions
- Increased frequency due to rapidly evolving situation
Development of questions

1) Stakeholder input / scanning of existing publications
2) Researcher-developed draft (multiple loops within the research team!)
3) (Discussion with UNWTO)
4) Pre-testing
5) Finalisation
6) Data collection, analysis & presentation
7) Stakeholder input

➢ It is important to invest sufficient time in the development of the questionnaire.
Recruitment and data collection

- N=95 (approximately 1% of the population)
- October 2020 (13/10 - 29/10)
- All permanent adult residents of the City of Busselton and the Shire of Augusta-Margaret River are eligible to participate

- Data collected in collaboration with the Local Government Area “Shire of Augusta-Margaret River”
- Online survey (promoted via the local government’s social media channels)
Process of Analysis
Process of analysis

1. Quality checks (IP, bot, speeding)
2. Demographics
3. Descriptive analysis
4. Advanced analysis (regression, external datasets)
Sample
Sample: Occupation

N=95

- Accommodation, food, or tourism services: 33%
- Art, recreation, and event services: 4%
- Public administration: 13%
- Healthcare: 6%
- Other: 38%
- No occupation: 6%
Indicators: General Module
Resident perception about tourist numbers

Before the COVID-19 pandemic initiated

At present

Too few
Good balance
Too many

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Resident perceptions of tourist behaviour

- Tourists are friendly and respectful toward local people
- Tourists appreciate the local cultures and ways of life
- Tourists adapt well to the local environment and climate
- Tourists concentrate on popular hotspots
- Tourists maintain the cleanliness of the local environment
- Tourists support the conservation of the local environment
- Tourists encounter language barriers
- Tourists meet local people and experience the local way of life
- Tourists abide by COVID-19 related requirements
- Tourists abide by the rules and regulations
- Tourists abide by COVID-19 related requirements

Scales: 1 - Strongly disagree, 2, 3, 4, 5, 6, 7 - Strongly agree
Resident perceptions of tourism impacts
Importance of tourism management measures

1. Improve existing infrastructures and facilities
2. Create additional activities and attractions
3. Create experiences and attractions that benefit residents as well as visitors
4. Ensure local communities benefit from tourism
5. Educate and prepare visitors
6. Communicate with and engage local communities
7. Promote tourism to other types of visitors and markets
8. Promote dispersal of visitors within the region and beyond
9. Monitor tourism development and impacts
10. Manage the number of tourism establishments
11. Promote dispersal of visitors all year long
12. Boost the number of visitors
13. Introduce specific health-related rules and procedures for tourists in order to protect residents (e.g. mandatory testing)

Very unimportant

Very important
Indicators: COVID-19 Module
COVID-19 pandemic in Western Australia

- **20 March 2020**: Australian international border closed to all non-residents
- **6 April 2020**: WA border closed
- **18 May 2020**: Regional travel restriction lifted (ASW)
- **20 March 2020**: Regional travel banned
- **31 March 2020**: Regional travel banned
- **27 June 2020**: Most remaining restrictions lifted
- **31 Jan 2021**: 5-day lockdown after 1 community case
- **23 April 2021**: 3-day lockdown after 2 community cases

(Source: ABC)
Tourism during the COVID-19 pandemic in WA

(1) Collapse of international tourism

<table>
<thead>
<tr>
<th></th>
<th>YE Dec-19</th>
<th>YE Dec-20</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Western Australia</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spend ($m)</strong></td>
<td>2,321</td>
<td>541</td>
<td>-76.7%</td>
</tr>
<tr>
<td><strong>Visitors</strong></td>
<td>995,700</td>
<td>220,200</td>
<td>-77.9%</td>
</tr>
<tr>
<td><strong>Nights</strong></td>
<td>25,189,100</td>
<td>6,443,000</td>
<td>-74.4%</td>
</tr>
<tr>
<td><strong>Average Length of Stay</strong></td>
<td>25.3</td>
<td>29.3</td>
<td>15.7%</td>
</tr>
<tr>
<td><strong>Average Spend per Visitor</strong></td>
<td>$2,331</td>
<td>$2,457</td>
<td>5.4%</td>
</tr>
<tr>
<td><strong>Average Spend per Night</strong></td>
<td>$92</td>
<td>$84</td>
<td>-8.9%</td>
</tr>
</tbody>
</table>

(Source: TRA, Tourism WA)

(2) Resilience of domestic intrastate tourism...

... in particular leisure tourism

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</tr>
</thead>
<tbody>
<tr>
<td><strong>Western Australia</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spend ($m)</strong></td>
<td>4,397</td>
<td>4,353</td>
<td>1.0%</td>
</tr>
<tr>
<td><strong>Visitors</strong></td>
<td>8,248,600</td>
<td>8,165,600</td>
<td>-10.0%</td>
</tr>
<tr>
<td><strong>Nights</strong></td>
<td>34,749,600</td>
<td>35,445,100</td>
<td>-2.0%</td>
</tr>
<tr>
<td><strong>Average Length of Stay</strong></td>
<td>4.2</td>
<td>3.9</td>
<td>8.9%</td>
</tr>
<tr>
<td><strong>Average Spend Per Trip</strong></td>
<td>$533</td>
<td>$475</td>
<td>-9.2%</td>
</tr>
<tr>
<td><strong>Average Spend Per Night</strong></td>
<td>$127</td>
<td>$123</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>YE Dec-19</th>
<th>YE Dec-20</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WA Intrastate Visitors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Holiday</strong></td>
<td>2,126</td>
<td>2,473</td>
<td>16.3%</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td>1,362</td>
<td>1,087</td>
<td>-20.2%</td>
</tr>
<tr>
<td><strong>VFR</strong></td>
<td>643</td>
<td>633</td>
<td>-1.6%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>223</td>
<td>203</td>
<td>-9.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>4,353</td>
<td>4,397</td>
<td>1.0%</td>
</tr>
</tbody>
</table>
Tourism during the COVID-19 pandemic in WA

(3) ... regional areas benefit (i.e., areas that have a strong focus on domestic and leisure tourism)

<table>
<thead>
<tr>
<th>Total Overnight Spend by Region ($ Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Destination Perth</td>
</tr>
<tr>
<td>Australia’s South West</td>
</tr>
<tr>
<td>Australia’s North West</td>
</tr>
<tr>
<td>Australia’s Coral Coast</td>
</tr>
<tr>
<td>Australia’s Golden Outback</td>
</tr>
</tbody>
</table>
Benefits of tourism vs risk of transmission of COVID-19 (2)

- **Domestic intrastate:** COVID-19 risks > tourism benefits
- **Domestic interstate:** COVID-19 risks = tourism benefits
- **International:** COVID-19 risks < tourism benefits

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Effectiveness of containment measures in avoiding the spread of COVID–19

<table>
<thead>
<tr>
<th>Measure</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection of health information from tourists (e.g. temperature check, COVID-testing)</td>
<td>5</td>
</tr>
<tr>
<td>Regular testing of infection of workers in travel and tourism</td>
<td>5</td>
</tr>
<tr>
<td>Hygiene training for staff in travel and tourism</td>
<td>6</td>
</tr>
<tr>
<td>Compulsory use of COVID-tracing apps</td>
<td>6</td>
</tr>
<tr>
<td>Compulsory use of masks in travel and tourism</td>
<td>5</td>
</tr>
<tr>
<td>Physical distancing in travel and tourism</td>
<td>5</td>
</tr>
<tr>
<td>Mandatory quarantine for arrivals</td>
<td>6</td>
</tr>
<tr>
<td>Domestic travel restrictions (with other Australian states)</td>
<td>6</td>
</tr>
<tr>
<td>International travel restrictions</td>
<td>6</td>
</tr>
</tbody>
</table>

1 No effect
2 Very effective
Resident support to opening int. borders to tourists

- If mandatory quarantine on arrival is ensured
- If an effective COVID-19 vaccine has been developed and is available
- If an effective quick test for COVID-19 has been developed and is available

Do not support opening at all

1  2  3  4  5  6  7

Strongly support opening

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Lessons learned & Concluding Thoughts
Reflections

- Need to carefully observe sample to avoid bias (e.g., people with a vested interest in tourism, people opposing tourism)
- Frequency: Repeating the survey frequently – tracking observations over time appears important
- Geolocalisation? Potentially yes, but becomes a question of sample size (and budgets)
- Adaptations in survey to cover most current needs
  - Working with stable and flexible components (e.g., COVID-19)
  - Be transparent with timing (as sentiment in some areas may evolve very quickly)
- Monitoring risk perceptions regarding tourism
- Cautiously explore possibilities to link ‘hard facts’ (public health) with perceptions
- Recruitment with local partner vs panel vs Facebook
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