

# Experiences Gold Coast Research Project - Product Development Plans

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Prepared by  
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Research commissioned by:  
City of Gold Coast

September 2015



# Tourism Research at Griffith University

- Griffith Institute For Tourism was launched in March 2014
  - Professor Susanne Becken (Director)
  - Professor Noel Scott (Deputy Director)
- Over 60 members (Interdisciplinary focus)
  - 30+ HDR candidates
- Four streams of research
  - Sustainable Tourism and Climate Change (Dr Moyle)
  - Customer Experience (Professor Sparks)
  - Tourism Business in the Asia Pacific (Professor Dahles)
  - Events: Sport, Culture and Special Interest Tourism (Dr Filo)



# Project Aim

Identify and characterise a range of new tourism products/experiences to inform an investment prospectus for the City of Gold Coast to determine the demand side issues and opportunities for developing new products and experiences on the Gold Coast.

Top 10 Australian destination choice preferences when holidaying in Australia.

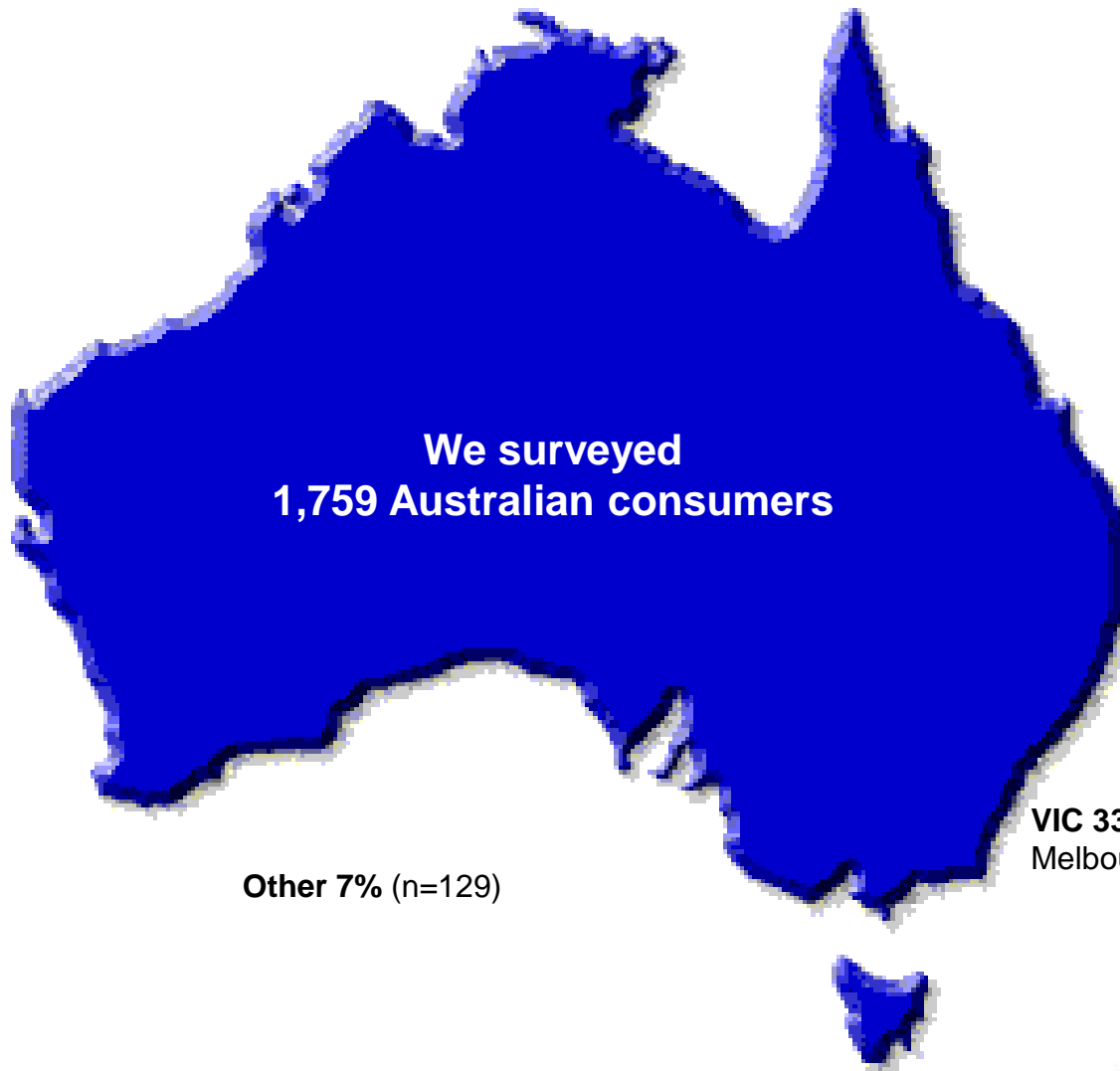
Experiences sought by Australians on a domestic holiday.

Experiences associated with the Gold Coast.

Reactions to 15 new tourism product ideas for the Gold Coast.



# Where were they from?



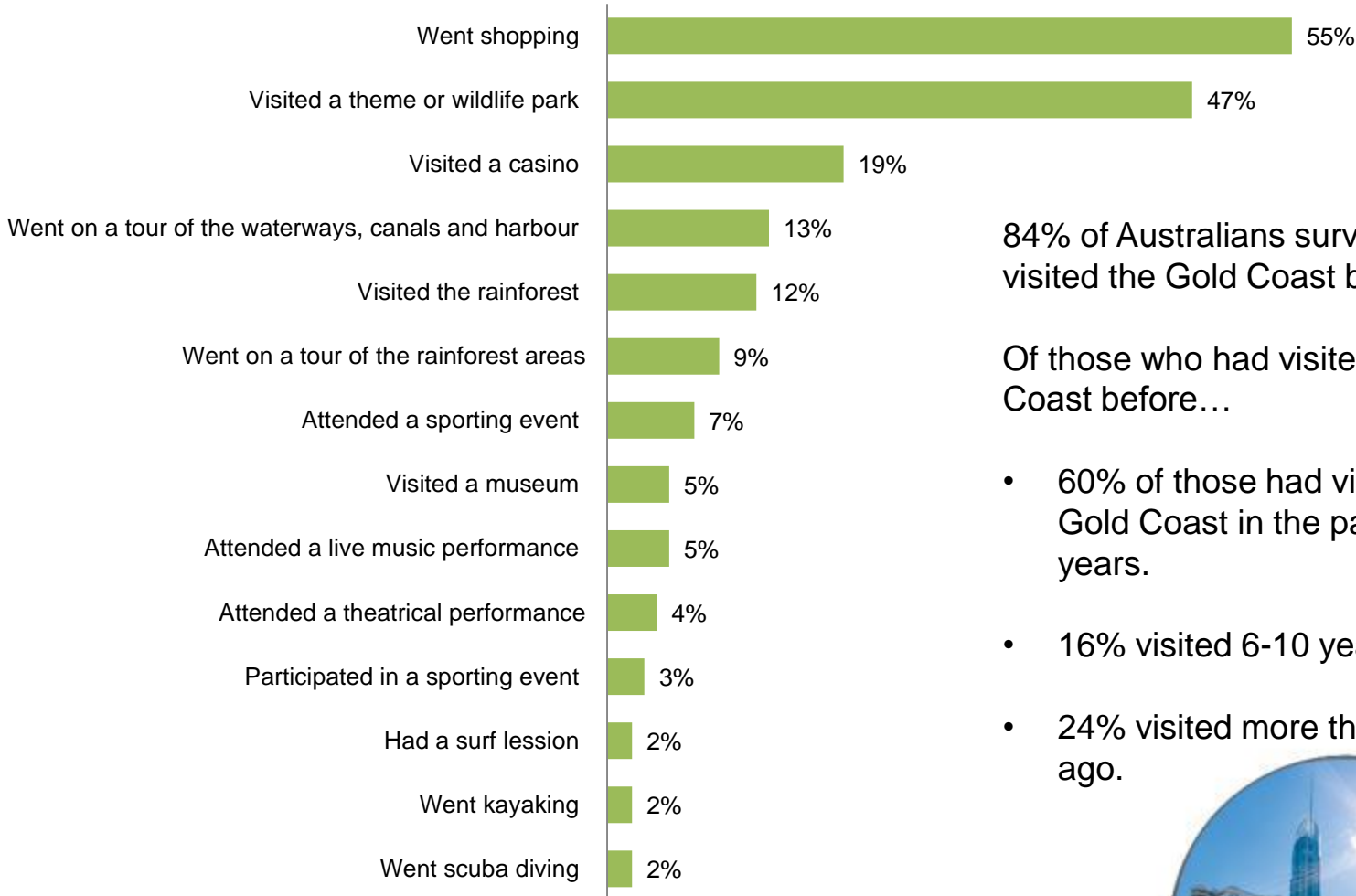
**QLD 24%** (n=417)  
Brisbane 14%

**NSW 36%** (n=638)  
Sydney 26%

**VIC 33%** (n=575)  
Melbourne 26%



# Activities Undertake on Last Trip to Gold Coast



84% of Australians surveyed had visited the Gold Coast before.

Of those who had visited the Gold Coast before...

- 60% of those had visited the Gold Coast in the past five years.
- 16% visited 6-10 years ago.
- 24% visited more than 10 years ago.



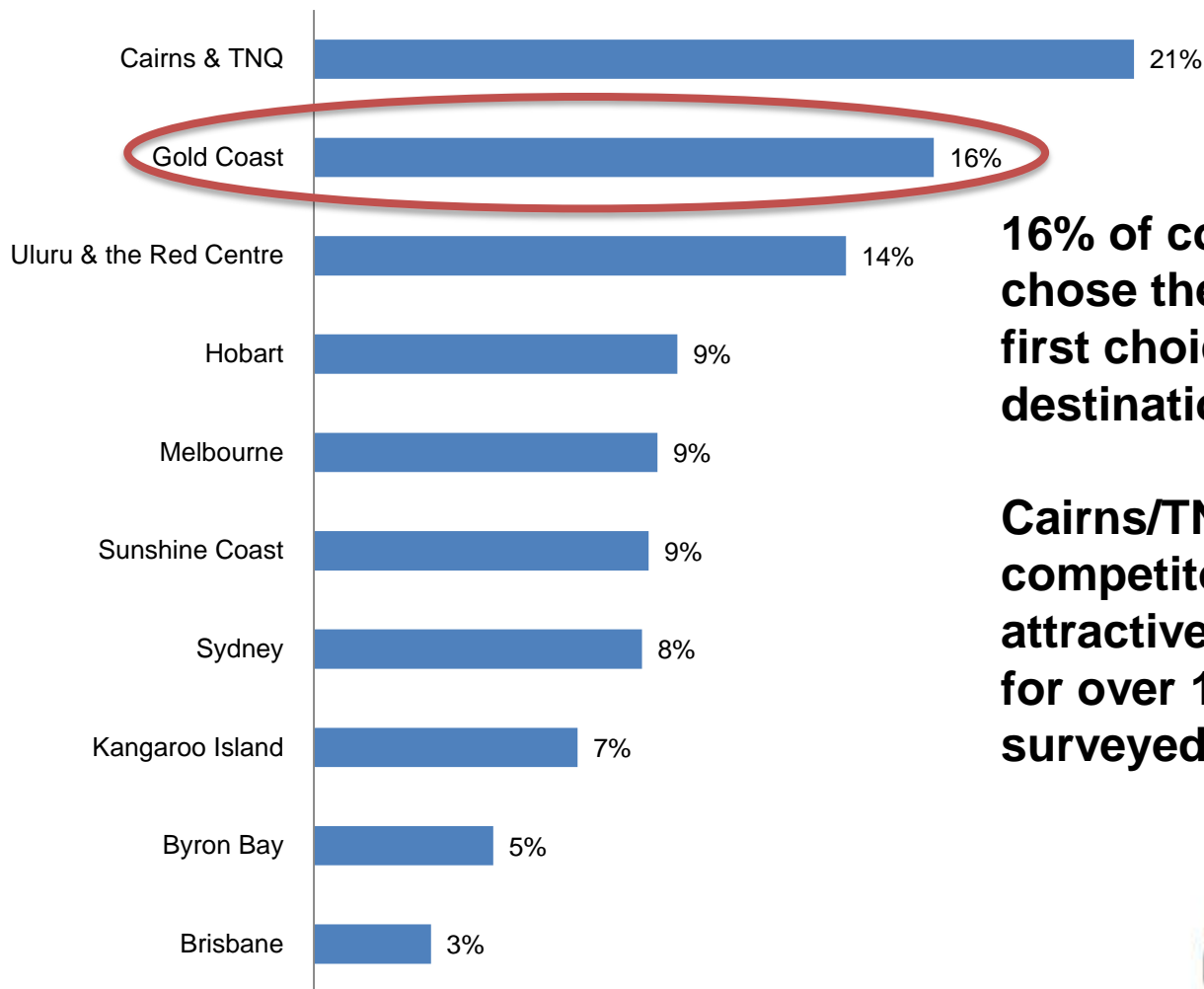




# Destination Choice



## 1st Choice Australian Holiday Destination

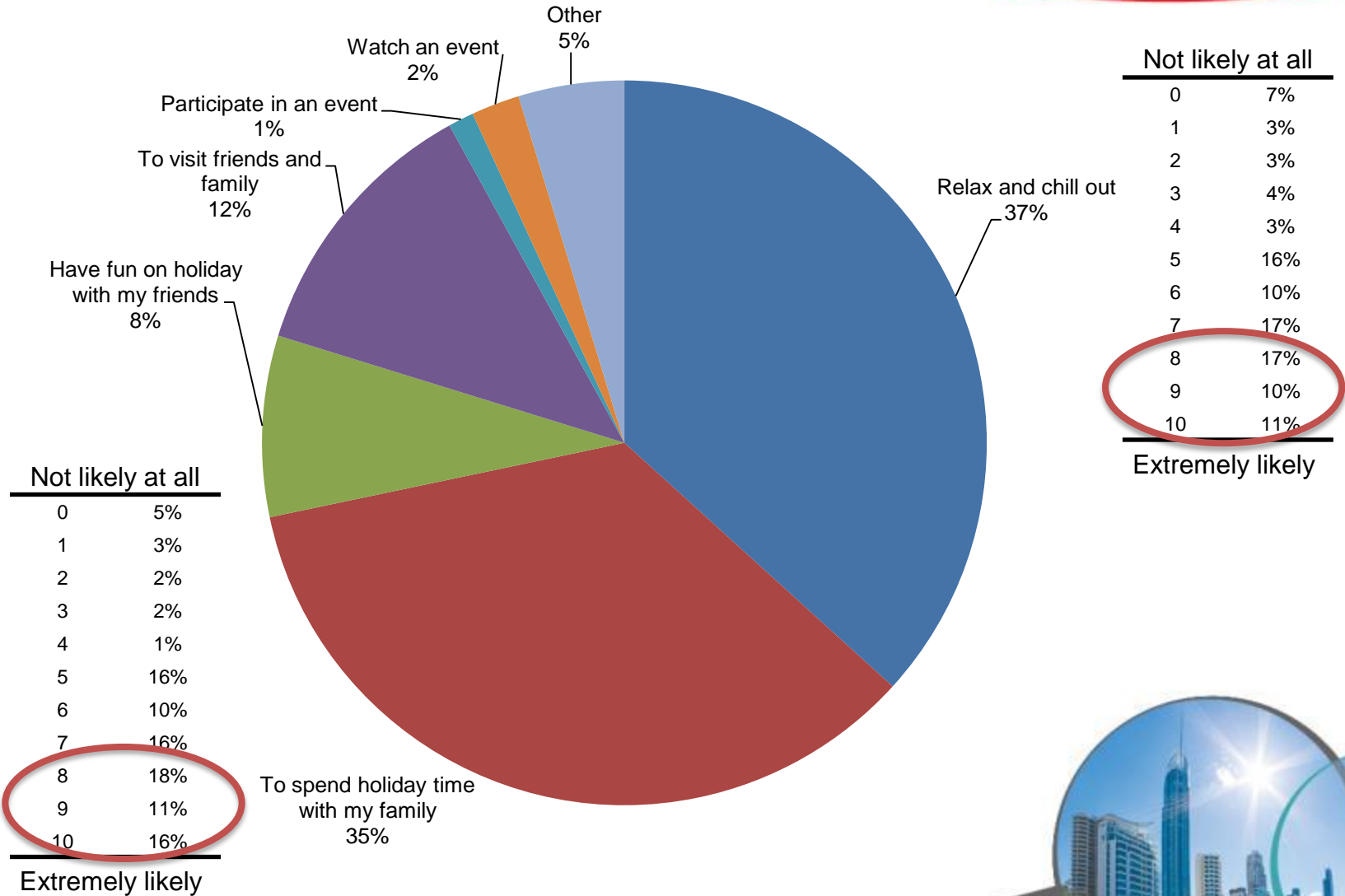


**16% of consumers surveyed chose the Gold Coast as their first choice Australian holiday destination.**

**Cairns/TNQ is the main competitor in destination attractiveness, ranking highest for over 1 in 5 consumers surveyed.**



# What would most motivate you to take an Australian leisure holiday in the next 12 months?



Not likely at all

0	7%
1	3%
2	3%
3	4%
4	3%
5	16%
6	10%
7	17%
8	17%
9	10%
10	11%

Extremely likely

Not likely at all

0	5%
1	3%
2	2%
3	2%
4	1%
5	16%
6	10%
7	16%
8	18%
9	11%
10	16%

Extremely likely





# Appealing Holidays Experiences for Australians



1 = Not at all important/Very unappealing 7 = Extremely important/Very appealing



Griffith Institute for Tourism



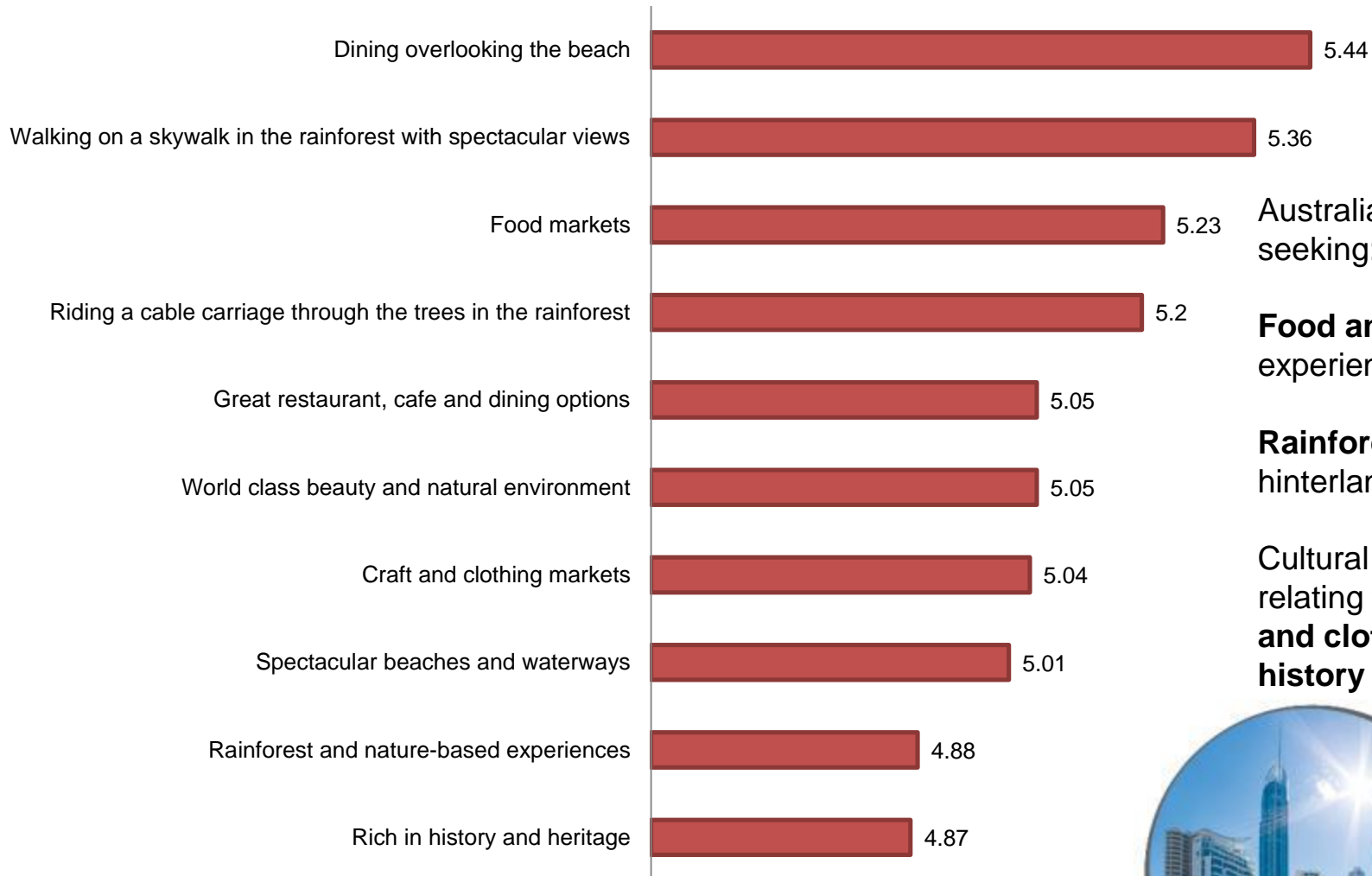


# Experience Preferences



# Top 10 Experiences for Australian Holidays

1 = Not at all important/Very unappealing 7 = Extremely important/Very appealing



Australians surveyed are seeking:

**Food and wine** experiences;

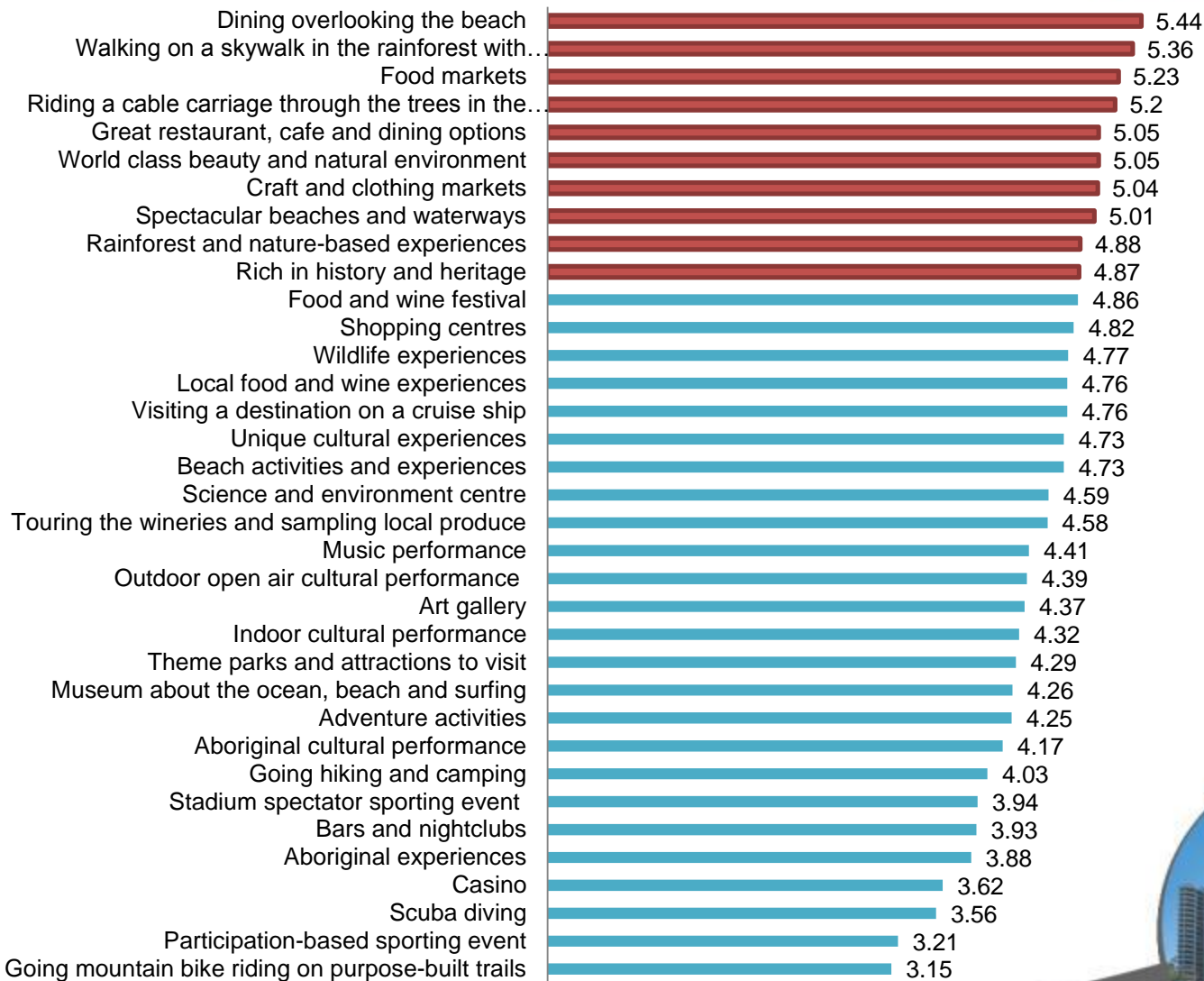
**Rainforest** and hinterland experiences;

Cultural experiences relating to **food, craft and clothing** and **history and heritage**.



# Experience Preferences for Australians

1 = Not at all important/Very unappealing 7 = Extremely important/Very appealing

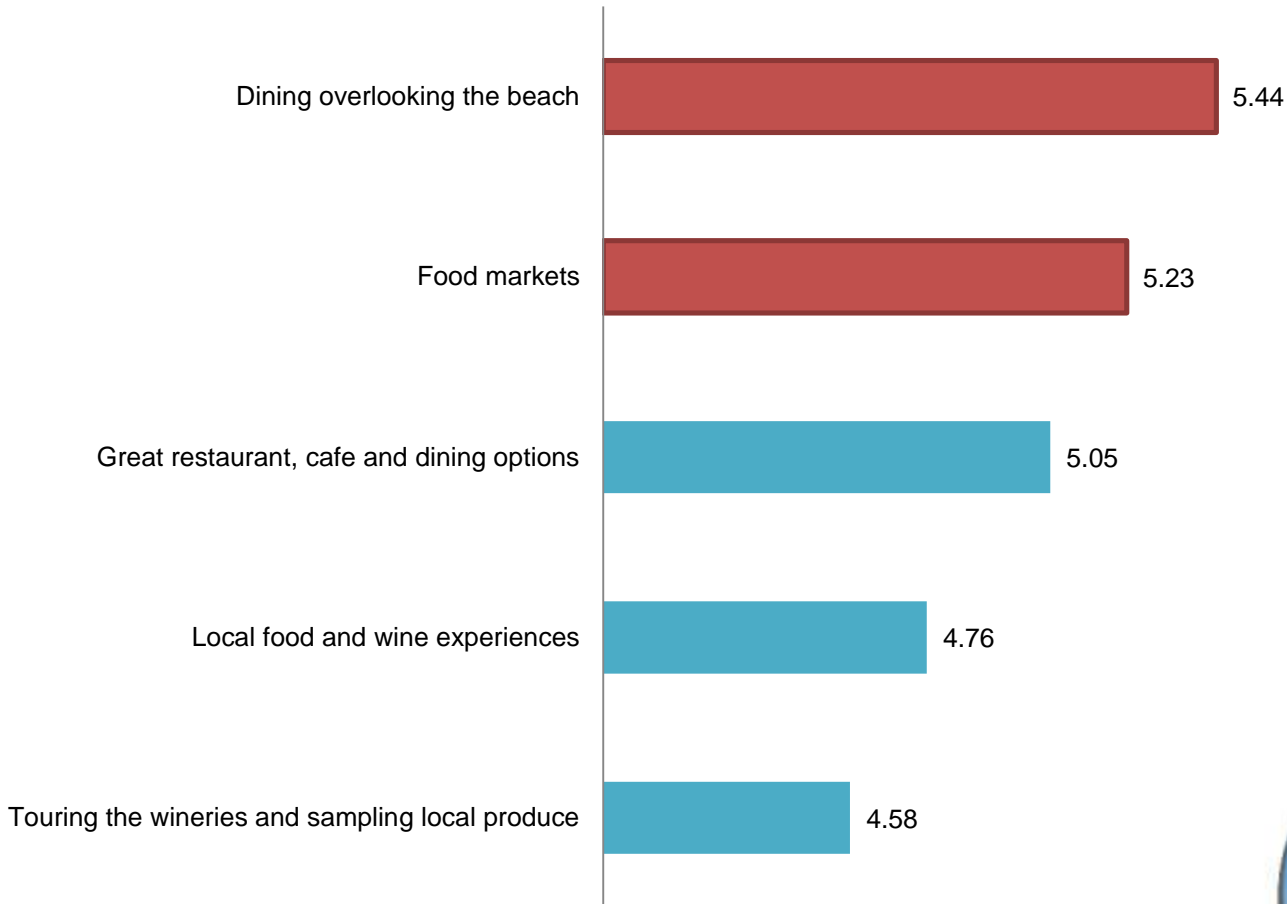


Griffith Institute for Tourism



# Top 5 Food and Wine Experiences to Australian Holidays

1 = Not at all important/Very unappealing  
7 = Extremely important/Very appealing



**Dining over looking the beach and food markets** were the most appealing experiences and in the Top 10 most appealing experiences.

Consumers surveyed were also interested in **great restaurant, café and dining options.**

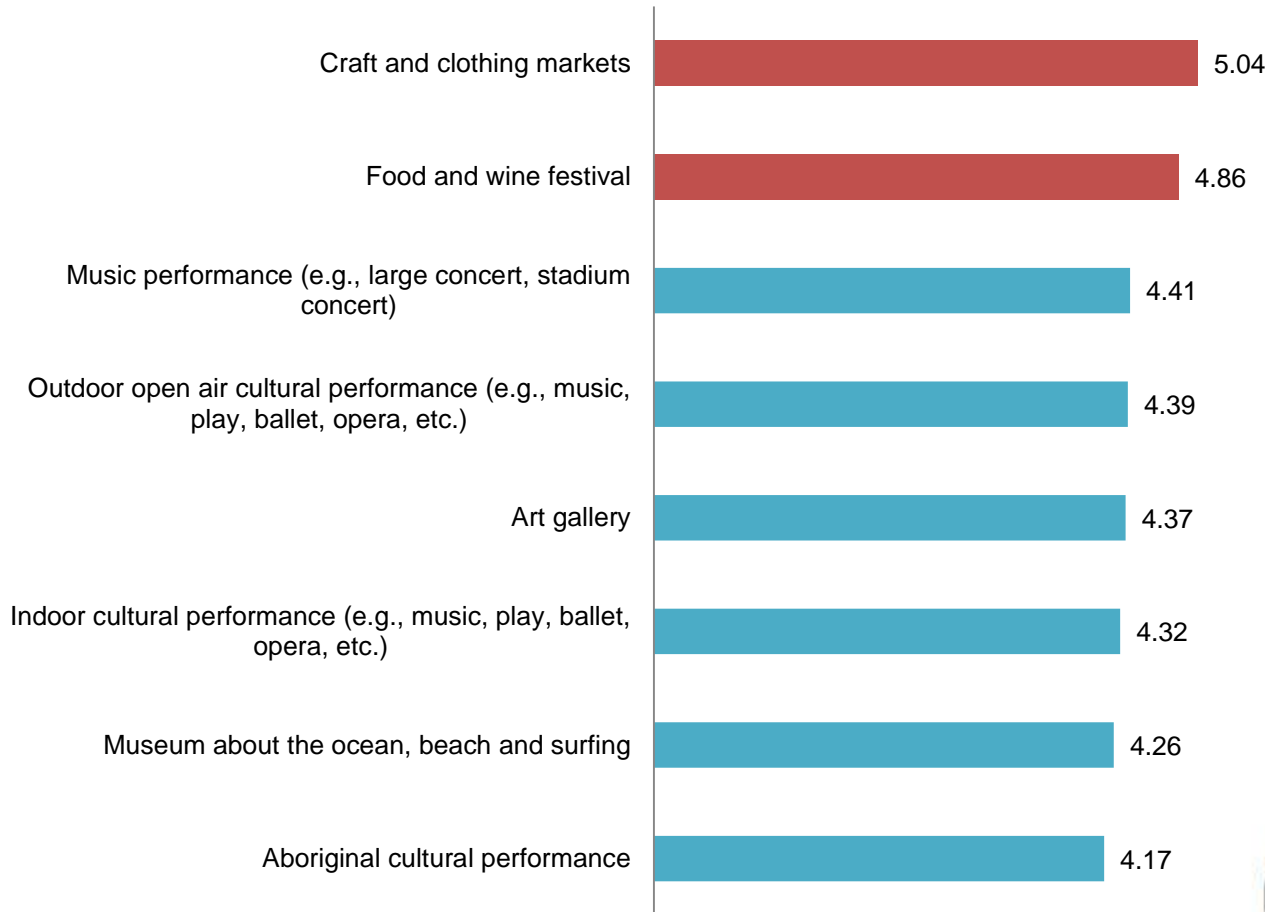
They also wanted the opportunity to experience **local food and wine.**





# Top Cultural Experiences on Australian Holidays

1 = Not at all important/Very unappealing  
7 = Extremely important/Very appealing



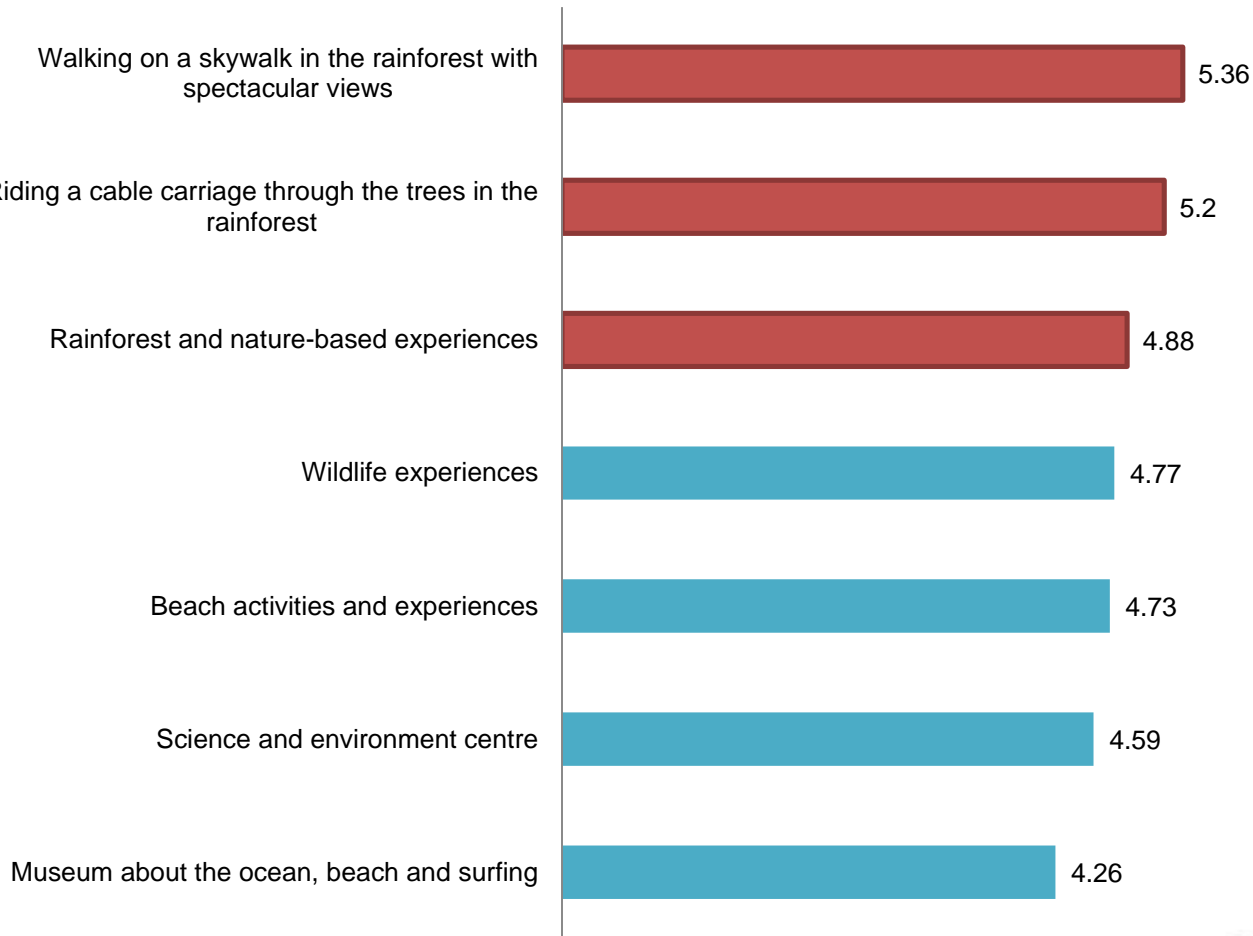
**Craft and clothing markets and food and wine festivals** are most appealing and in the Top 10.

There is also some interesting in music and cultural **performances** and visiting an **art gallery** and the ocean, **beach and surf museum**.



# Top Nature-based Experiences on Australian Holidays

1 = Not at all important/Very unappealing  
7 = Extremely important/Very appealing



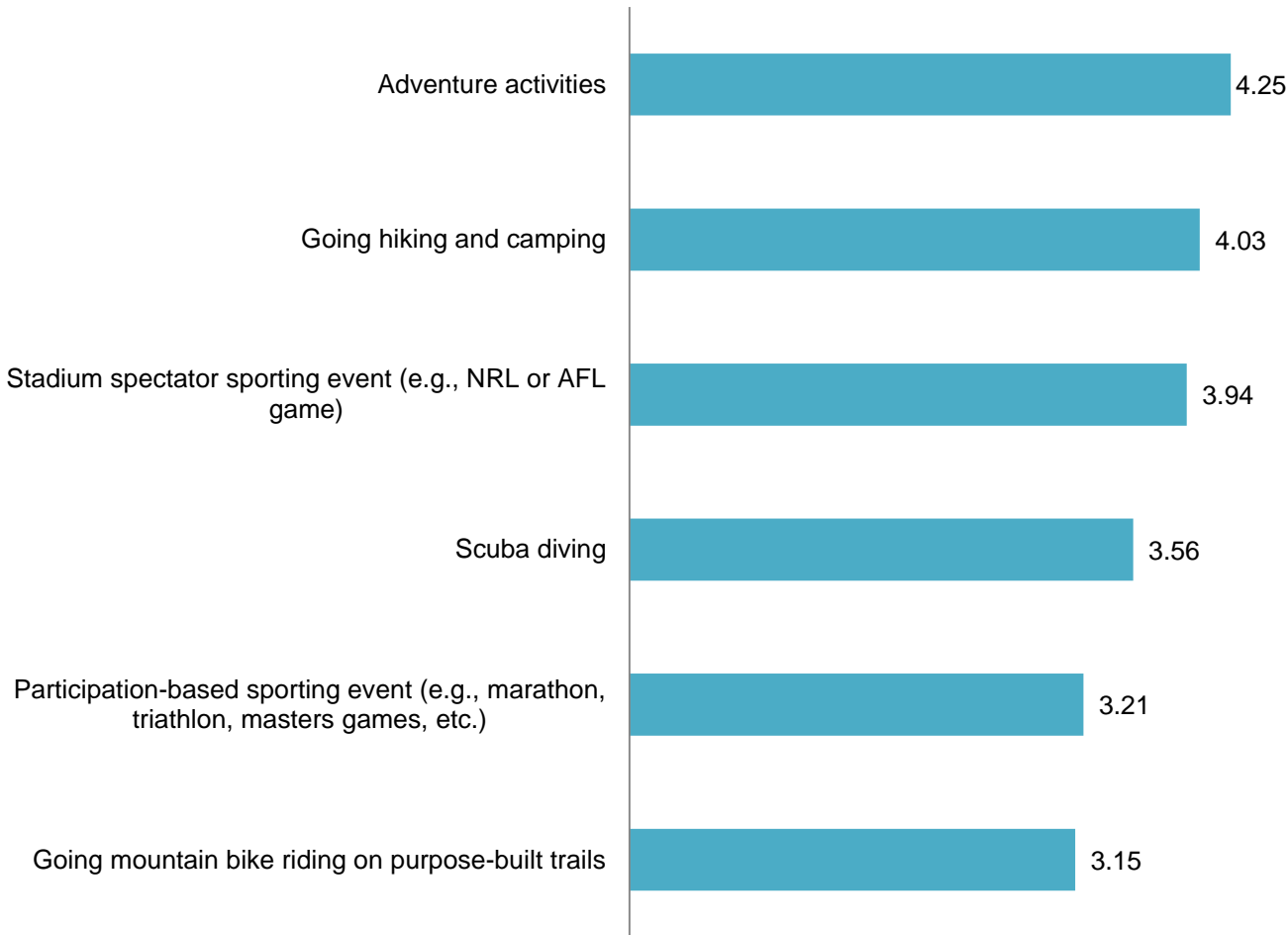
Experiencing the rainforest from a **skywalk** and **cable car** were the most appealing nature-based experiences and were in the Top 10.

There was also interest in **wildlife and beach experiences**.



# Sporting and Active Experiences on Australian Holidays

1 = Not at all important/Very unappealing  
7 = Extremely important/Very appealing



None of these activities were in the Top 10, suggesting this is a special interest market.

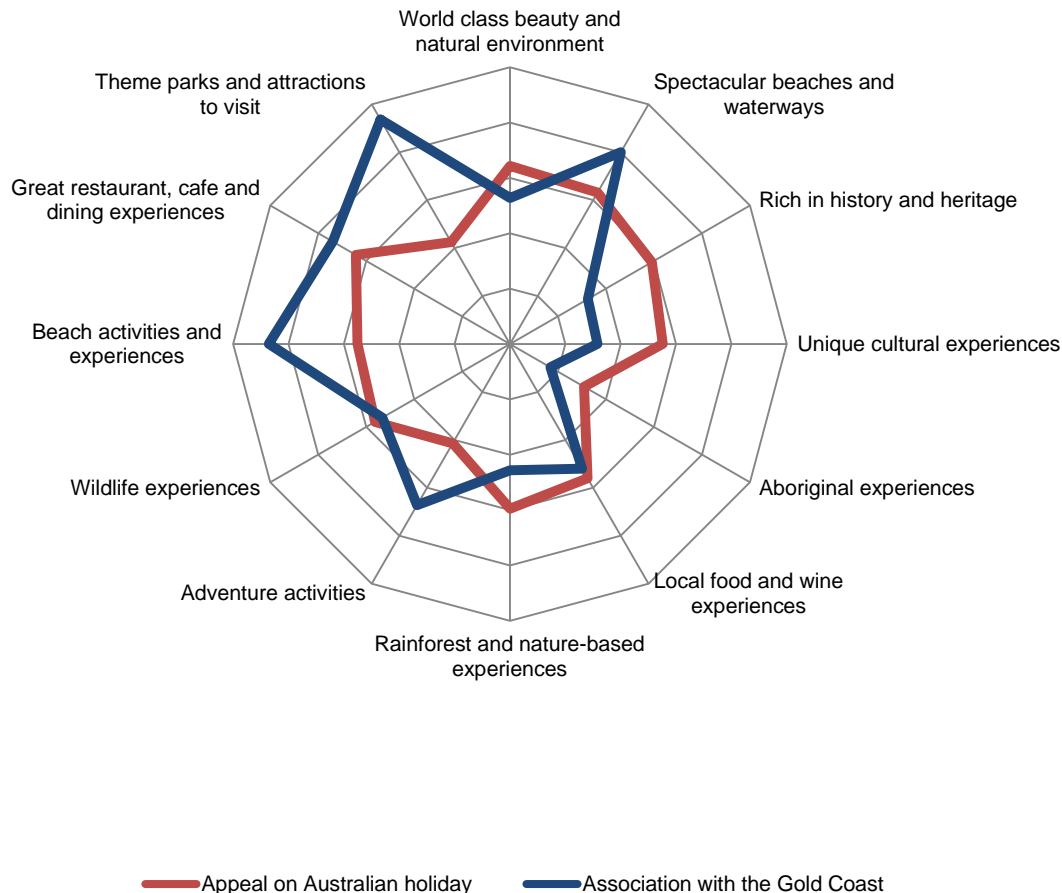
**Adventure activities, hiking and camping** were the most appealing experiences in this category.



# Experiences on the Gold Coast



# Experiences: Importance and Association with the Gold Coast



Australians are most interested in **dining experiences** when holidaying and the Gold Coast needs to improve its association with this experience.

They also place importance on the natural environment and the Gold Coast is highly associated with having spectacular beaches and waterways and beach-based experiences but **needs to build its association as a naturally beautiful place that has rainforest and nature-based experiences.**

Further work also needs to focus on creating **unique cultural experiences** related to local history and heritage and local food and wine.

Aboriginal and theme park experiences are not viewed as important among Australians surveyed when selecting a holiday destination.



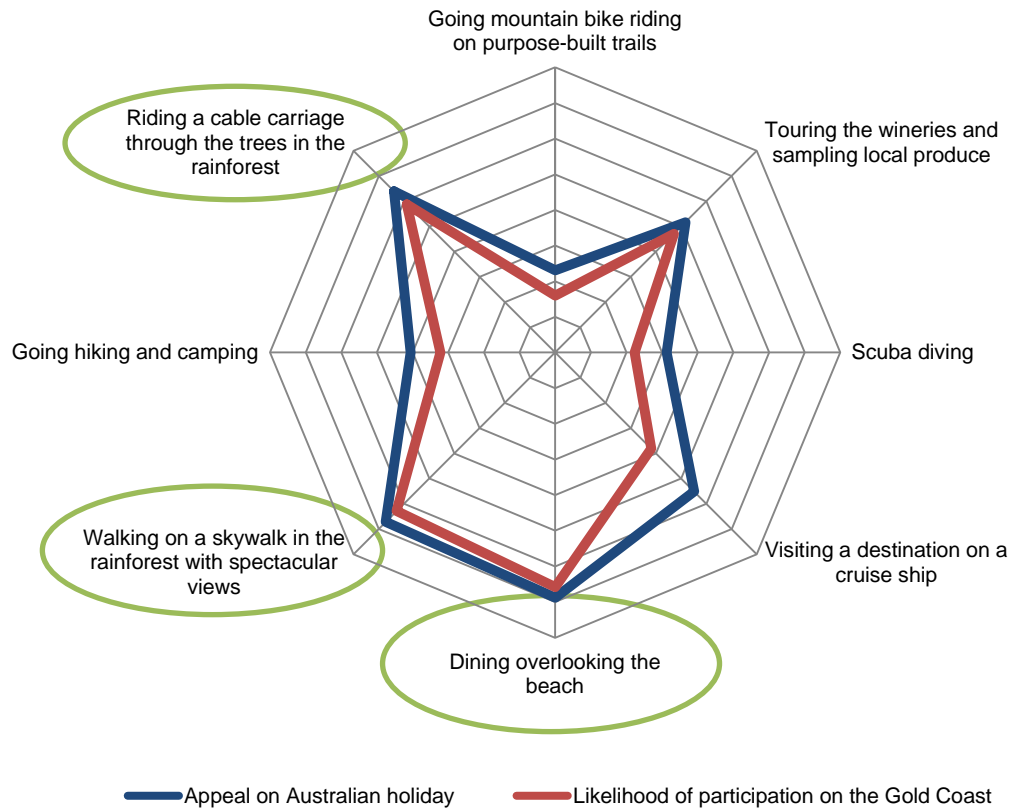


# Activities: Appeal and Likelihood of Participation When Visiting the Gold Coast

Australians find **dining over looking the beach** and there was a strong likelihood of participation in this activity if it was available on the Gold Coast.

**Exploring the rainforest via cable carriage and skywalk** was also appealing and Australians surveyed thought they would be likely to participate in these activities if they were available on the Gold Coast. There was also some interest and likelihood of participating in **touring the wineries and sampling local produce** on a Gold Coast holiday.

Australians surveyed found **visiting the Gold Coast on a cruise ship** somewhat appealing, but were neutral on likelihood of participating in this activity on a Gold Coast holiday.

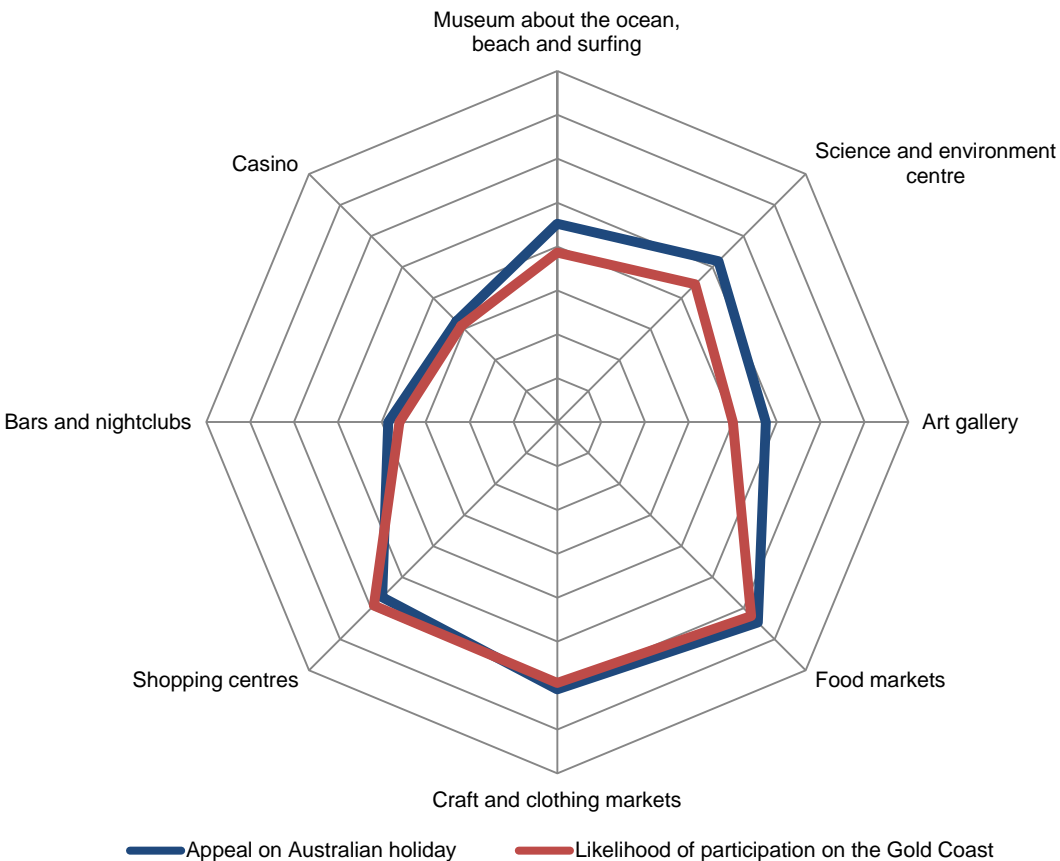


# Attractions: Appeal and Likelihood of Participation When Visiting the Gold Coast

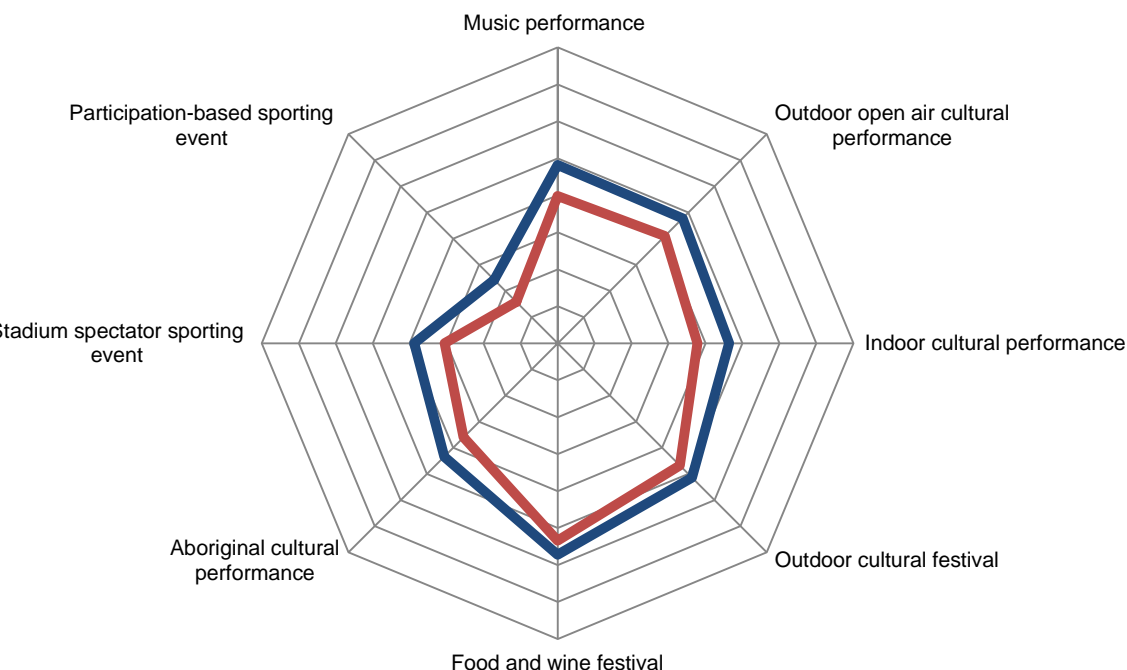
Shopping at food markets followed by craft and clothing markets and shopping centres were appealing attractions for those surveyed when on holidays in Australia. There was also somewhat likely to participate in these activities if they were available when visiting the Gold Coast.

There appears to be more interest and likelihood of visitation in the **science and environment centre** than in a **museum about the ocean, beach and surfing** and an **art gallery**.

Most Australians surveys found **casinos and bars and nightclubs** unappealing and felt they would be unlikely to participate in these activities would visiting the Gold Coast.



# Event: Appeal and Likelihood of Participation When Visiting the Gold Coast



**Food and wine festivals** and **outdoor cultural festivals** (e.g., music, play, visual art, ballet, opera, etc.) are the most appealing and had a highest likelihood of participation for Australians surveyed.

**Music performances** also rated highly.

**Indoor and outdoor cultural performances** rated similarly.

Both **participation and spectator sporting events** were not overly attractive to the general Australian surveyed, suggesting this is a niche segment.

— Appeal on Australian holiday      — Likelihood of participation on the Gold Coast





# Experience Testing



# Attraction Experience Preferences



Visiting a snow dome  
12%



Visiting an aquarium and marine science centre  
17%



Visiting a new adrenalin park  
7%

None of these experiences  
9%



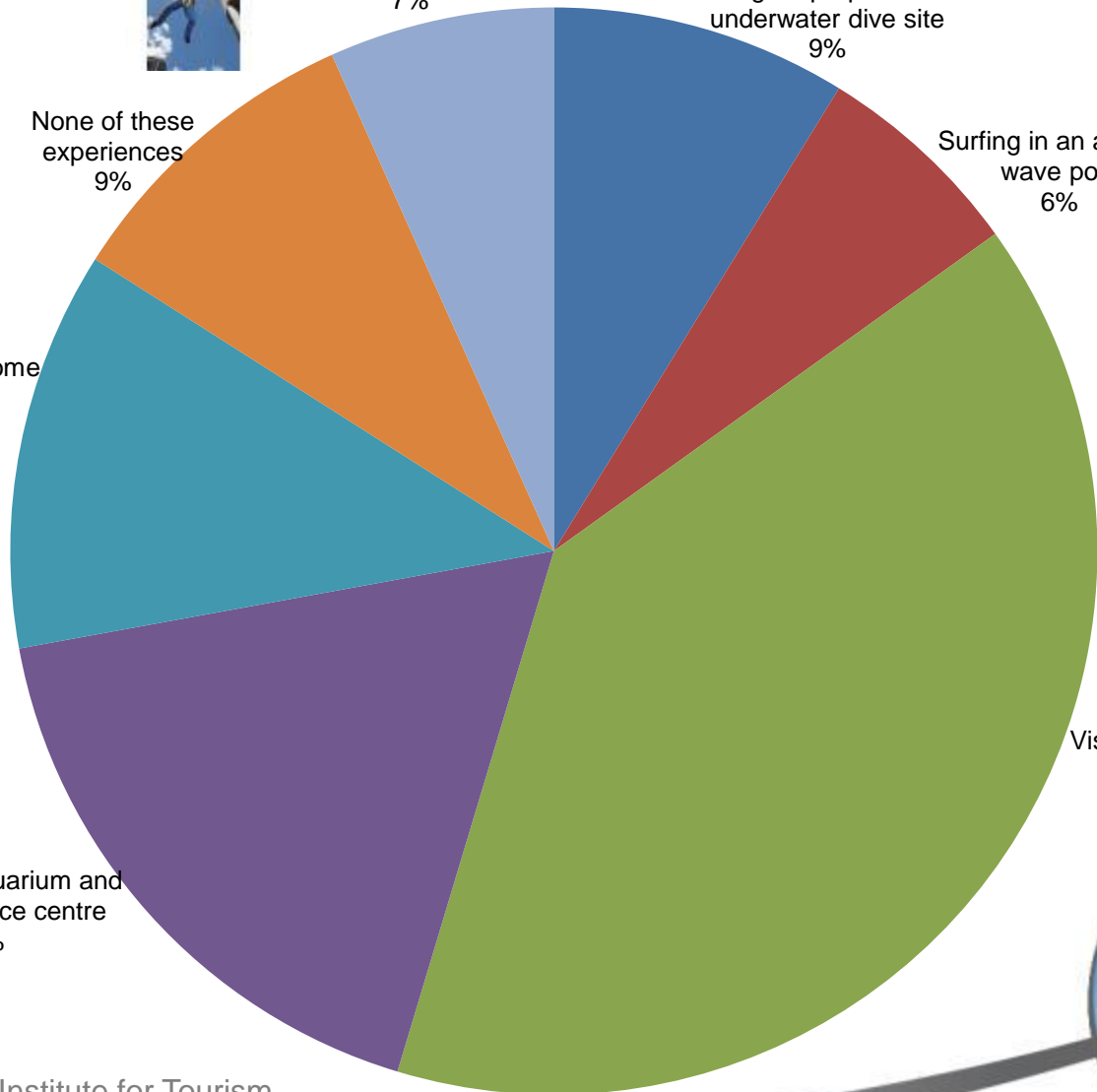
Diving an purpose-built underwater dive site  
9%



Surfing in an artificial wave pool  
6%



Visiting the rainforest  
40%



**Visiting the rainforest and an aquarium and marine science centre** were the most appealing experiences for 40% and 17%, respectively, of Australian surveyed.





# Cultural Experiences



Ocean and surf museum  
9%



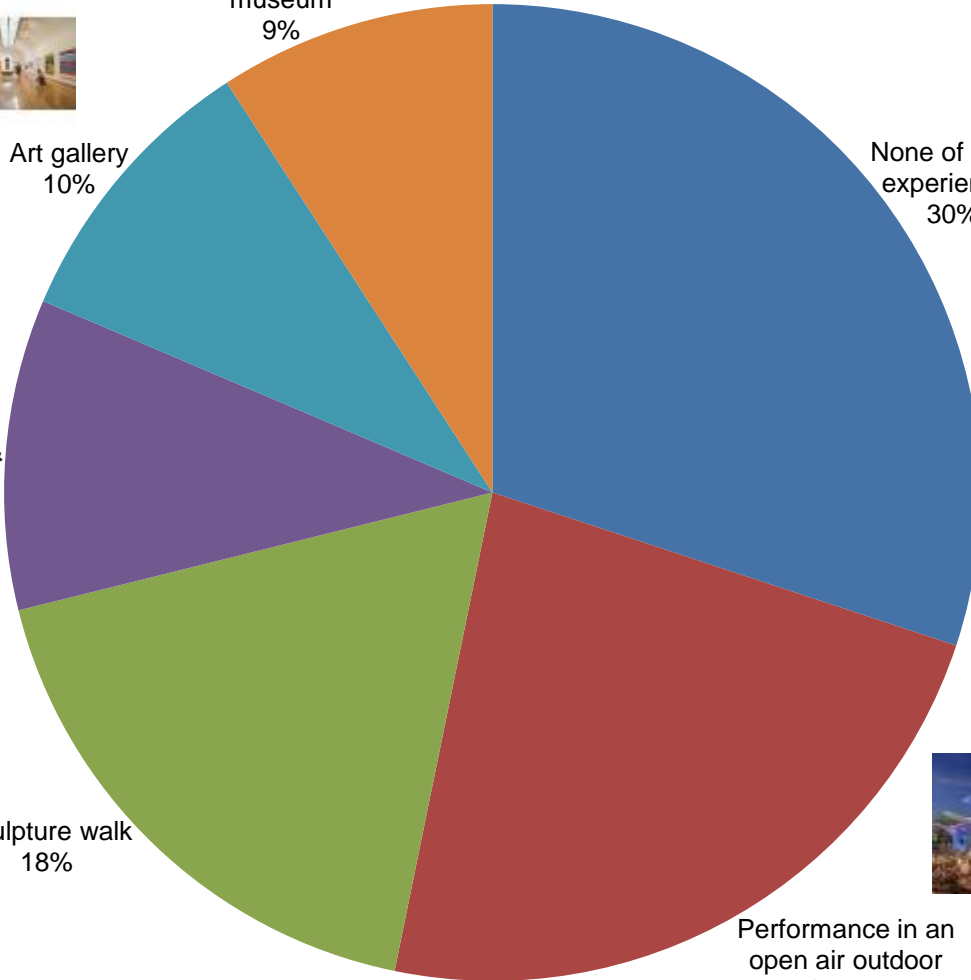
Art gallery  
10%



Cultural tower & precinct  
10%



Sculpture walk  
18%



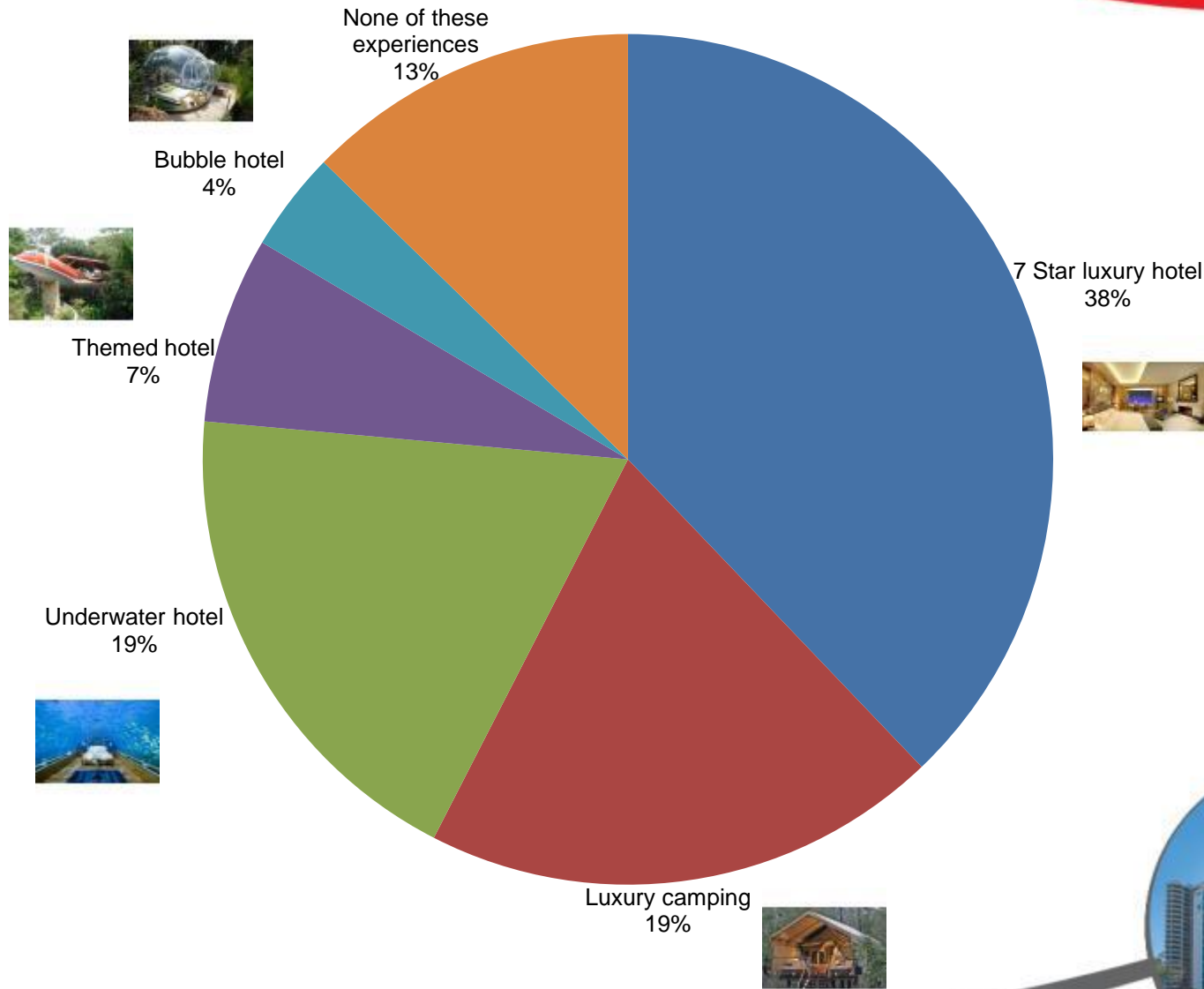
Performance in an open air outdoor theatre  
23%



Australians surveyed found **performance in an open air outdoor theatre** and **sculpture walk** were the most appealing experiences for 23% and 18%, respectively, of Australians surveyed.



# Accommodation Preferences



Australians surveyed found **7 star luxury hotel**, **luxury camping** and an **underwater hotel** were the most appealing experiences for 38%, 19% and 19%, respectively, of Australians surveyed.



# Strategic Insights

Cairns is the main competitor to the Gold Coast in the domestic market.

Gold Coast is a mass market, mature destination – consumer have embedded “mental images” of the Gold Coast.

Implications for strategy for experience development. Defining the purpose of each new experience – special interest vs mass appeal.

Need to massage new ideas, e.g., creating a dive attraction for the mass market, dining at a surf museum, etc.



# Please Email Questions

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