



# Experience Gold Coast:

## Innovative Products for Asian Visitors

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**Griffith Institute for Tourism Research Report Series**  
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## **Organisations involved**

Ms Kerri Jekyll (Get Wet Surf School), Mr Al Mucci and Ms Sandra Williamson (DreamWorld), Mr Steven Vah (Australia Kayaking Adventures), Mr John Princehorn (Currumbin Wildlife Sanctuary), and Mr Tony Johnson (Paradise Jet Boating).

## **About Griffith University**

Griffith University is a top ranking University, based in South East Queensland, Australia. Griffith University hosts the Griffith Institute for Tourism, a world-leading institute for quality research into tourism. Through its activities and an external Advisory Board, the Institute links university-based researchers with the business sector and organisations, as well as local, state and federal government bodies. For more information, visit <http://www.griffith.edu.au/griffith-institute-tourism> .

## **1. Executive Summary**

This report documents the results of a research project which aimed to enhance the quality of the experiences provided by Australian tourism businesses. Tourism is a lead industry in the experience economy. In this new era, operators are seeking ways to provide experiences that offer unique and meaningful experiences for consumers, through dialogue and connection, rather than stock-standard, passive tours and products. As a leading Australian leisure tourism destination, the Gold Coast offers a variety of interesting and attractive experiences to its visitors and wants to be at the forefront of experiential tourism. The Gold Coast is receiving increasing numbers of Asian visitors and this research examined how to enhance the visitor experience, with a specific focus on developing product for the international student market.

The research team worked closely with five Gold Coast tourism businesses which targeted younger visitors to enhance the experiences they offered. The research involved an initial series of qualitative focus groups with international students in Brisbane and the Gold Coast and was followed by a survey of both international and domestic students currently living in Australia.

The results indicate that there are important differences in how to promote experiences to Asian (especially Chinese) students. Mobile phone based applications, such as Wechat, are important. The results also indicated significant cultural differences between the beach and water based attitude and behaviour of Australian and Chinese students. Fear of the open ocean and the surf waves and avoidance of the sun are frequent concerns of Chinese students. A number of recommendations as to how to address these culturally based concerns were made based on the research findings. The detailed results of the research are provided.

The research project provides a model for how to improve experiential products to match the needs of new markets through close integration of academic researchers and industry participants.

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## 2. Introduction

To remain competitive in a changing tourism market, Australian tourism businesses need to ensure that they offer experiences that meet their visitors' needs. The Gold Coast, Australia's major leisure tourism destination, provides a fun, holiday environment built around its core resources of beaches, relaxed lifestyle and pure natural environment. The Gold Coast has traditionally catered for Australian visitors from Brisbane, Sydney and Melbourne but more recently has received first Japanese and then Chinese visitors.

Addressing the needs of Chinese travellers requires some adaptation of the experiences that have been traditionally offered to Australian, European and North American visitors. While, many of the physical products and services that are provided to Chinese visitors may be the same (i.e., same aeroplanes, airport, hotel, and beach), the Gold Coast also needs to tailor its experiences to match important cultural differences.

To explore these cultural differences and to ensure that research findings were both practical and actually taken up by businesses on the Gold Coast, the research:

- Was conducted with Chinese students already living in Australia. As will be discussed below, the student market is an attractive target for tourism businesses in itself. In addition, research with Chinese university students living in Brisbane and the Gold Coast enabled the researchers to obtain cultural insights from people already aware to some extent of the Gold Coast and its experiences. In addition, it allowed the research to focus on one target market – young people who want particular types of experiences;
- Involved the managers of tourism businesses wanting to attract more Chinese visitors from the start. This meant that the research team could find out how Chinese people reacted to their particular experiences and that outcomes were practical and able to be implemented. Businesses offering outdoor experiences attractive to young people and who were willing and able to adopt the research findings were selected.

The careful selection of the type of visitor and business managers involved in this project was critical to its success. As a result changes to the experiences offered which were recommended from the research **have already been implemented**.



The research project was undertaken by researchers from Griffith University and The University of Queensland who had extensive industry experience. The 18 month project was funded by a competitive Australia Government TQUAL grant and supported by City of Gold Coast and Gold Coast Tourism. The research aim was to provide insights that enable development of innovative experiences tailored to the needs of international students studying in the English language and higher education sectors in Australia. The project involved a number of stages.

1. A capacity audit involving interviews with business managers to identify suitable experiences and research partners.
2. Qualitative research involving eight focus groups with international students.
3. Experience testing through on-site visits by Chinese students and an online survey of international students in Australia.
4. Industry and community dissemination activities.

The first stage of the project was to identify five tourism small tourism operators on the Gold Coast who were interested in developing their experiences to better cater to Chinese students. The businesses selected provided water based or entertainment/learning experiences attractive to young people. The researchers became familiar with the experiences offered and the goals of their managers.

Qualitative research involved eight focus groups with international students from China at both Griffith University and University of Queensland campuses. These focus groups aimed to explore the attitudes of international students to water-based adventure and to experiences on the Gold Coast, Australia, generally. After the focus group sessions, students were able to participate in an activity: choosing from a surf lesson, kayaking tour, jet boat tour or visiting the Currumbin Wildlife Sanctuary. Students were interviewed after returning and asked about their perceptions, emotions and attitudes to the activity.

The final stage of the research involved two quantitative surveys – one with international students and one with domestic students, with this report detailing the results. The online surveys assessed how the students value different features that make up the experience that they were interested. The survey questions were developed in conjunction with each participating business to ensure the anticipated results would be of use to future decision making.

In addition, an industry dissemination workshop discussing examples of experiential product design was undertaken. This was a half day workshop and was attended by around 90 industry participants.

## **2.1 The research focus: international students**

There are over 400,000 international students studying in Australia in 2014 (Australian Education International 2014). The top five nationalities contribute over half of the total international student enrolments in Australia. China is the largest market, contributing 29% of enrolment, followed by India (11%), Korea (5%), Vietnam (4%) and Malaysia (4%). Although the other nationalities comprise the other 47% of the market, other of these nationalities is less than 4% of the market.

International students are focused on education first and travel is an auxiliary consideration. They tend to travel in groups with other international students, mostly of the same nationality, on day excursions and short breaks on less than one week. They prefer to stay in hotels and engage in tourist experiences, such as seeing major attractions and landmarks (Gardiner, King & Wilkins, 2013; King & Gardiner, 2013, In Press). Addressing the differences between international students and other tourist segments is a challenge faced by youth-oriented tourism product in Australia (and in other countries around the world) because most of the youth-orientated tourism product has been developed for the western backpacker market, and thus may not meet the needs of the Chinese and South East Asian-focused international student market.

### **3. Selection of Business Partners**

In order to select tourism operators willing to undertake new product development<sup>1</sup>, (either redevelopment of existing products or a completely new product), the project was advertised through a local industry association, the Gold Coast Adventure Travel Group, who advise the regional tourism organisation, Gold Coast Tourism, on youth and adventure travel initiatives for the city. Nine tourism business owners responded by completing an expression of interest. The manager, or their representative, was then invited to an interview and the project was explained in detail. Five businesses were selected to participate in the project as shown below.

#### **3.1 Paradise Jet Boating**

Paradise Jet Boating is located Mariners Cove Marina at Main Beach on the Gold Coast, near Sea World on the Spit. They offer a range of jet boating tours including one hour Broadwater adventures and a combination of their activities with other tourism business such as ballooning, helicopter rides, wildlife park visitors and meals. Their current location provides direct access to open water of the Broadwater, so they can begin the high speed manoeuvres almost as soon as they leave the dock, unlike their main competitor who departs from docks in Surfers



Image courtesy of Paradise Jet Boating.

Paradise and, therefore, has to travel through reduced speed areas on the Nerang River before accessing the Broadwater. This direct access enhances the tourism experience for customers. According to Trip Advisor (at the time that this report was prepared), Paradise Jet Boating is ranked Number One Activity on the Gold Coast and Number One Jet Boat Ride in Australia for 2014. As an outcome of this research, Paradise Jet Boating sought to test the components of its experience to determine the mix of “nature and sightseeing” and “thrills and adventure” on its tours to develop a tour experience that was more appealing to the Asian independent travel market and, in particular, international students and their visiting friends and family.

#### **3.2 Get Wet Surf School**

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<sup>1</sup> Note: the terms product and experience are often used interchangeably by tourism business managers. The term experience relates to the visitor's feelings and sensations, emotions, learnings and interactions during and after the activity. The term product is often used to denote the tangible or service activities which compose part of an experience.

Get Wet Surf School is located on the northern end of the Spit at Main Coast on the Gold Coast. They run their surf lesson on the surf beach, just south of the Gold Coast Seaway. The surf school offers a number of options including individual lessons, three and five lesson package, family packages and private lessons. It is the only surf school on the Gold Coast to offer a “money back guarantee” that gives customers their money back if they are not surfing a wave at the end of their first lesson.



Image courtesy of Get Wet Surf School.

Get Wet Surf School wanted to introduce a new beach awareness experience for the international student market. This experience would be less focused on standing up on a surf board and more focused on learning about and interacting with the surf beach. This research aimed to inform the development of that experience.

### 3.3 Australian Kayaking Adventures



Image courtesy of Australian Kayaking Adventures.

Australian Kayaking Adventures is based at Budds Beach in Surfers Paradise on the Gold Coast. They offer a guided kayaking tour, departing each morning from Labrador on the Broadwater, and kayak and stand-up paddle board hire from Budds Beach. Their half-day tour to South Stradbroke Island features an abundance of marine life including

dolphins, turtles and tropical fish. Australian Kayaking Adventures were keen to develop a new canal kayaking tour that departed from Budds Beach in the late-afternoon. The focus of this tour is sightseeing around the canals of Surfers Paradise. It would be at a more relaxed pace, with less physical exertion required, than the morning tour and would not include snorkelling so guests were less likely to need to swim or get wet. Instead guests would enjoy the tranquil waters of the canals and then have cheese and wine at the end of the tour. The operator thought this experience would be more appealing to Asian visitors and wanted to gain insights from the Asian international student market to inform this new product development.

### 3.4 Currumbin Wildlife Sanctuary

Currumbin Wildlife Sanctuary is located at Currumbin on the Gold Coast. It is world renowned for its feeding of vast flocks of free-flying wild Rainbow Lorikeets which happens twice daily. The Sanctuary offers a multitude of events, shows and attractions including dingo encounters, free flight bird shows and salt water crocodile feeding. Guests can also hand feed kangaroos. The Sanctuary includes a state-of-the-art veterinary and rehabilitation hospital



Image courtesy of Currumbin Wildlife Sanctuary.

where thousands of sick and injured animals are brought every day. More recently, the Sanctuary opened an adventure park course with 80 high rope challenges and offers Segway rides and tours of the park. Currumbin Wildlife Sanctuary wanted to participate in this research to explore the potential to develop a new park app. This app was intended to augment the guest experience in the park and assist navigation to the various shows and exhibits.

### **3.5 Dreamworld**

Dreamworld is located on the north end of the Gold Coast at Coomera. It is home to 13 “worlds”, some of which include: Tiger Island, Dreamworld Corroboree, Wiggles World, V8 Supercars RedLine, FlowRider and the Big 8 Thrill Rides. In 2006, Dreamworld expanded its offer, opening a new water park, WhiteWater World, next door. WhiteWater World has extreme waterslides and family friendly water slides and attractions as well as a wave pool.

Dreamworld sought to use this research to inform the development of their new Dreamworld Corroboree attraction that opened in December 2013.



Image courtesy of Dreamworld.

## **4. Focus Groups with Chinese International Students**

To begin to explore ways to make these experiences more appealing to international students, eight focus groups were conducted with international students studying English language and undergraduate degree programs at Griffith University and The University of Queensland in South East Queensland, Australia. Seven of the focus groups were conducted with Chinese students and a mixed nationality focus group was also conducted. Most English language student participants had been in Australia less than six months and most university student participants had been in Australia one to five years. There was a slight gender bias in the sessions, with more females than males participating.

Focus groups enable participants to provide detailed accounts of their views and beliefs about the tourism experiences, thus, providing in-depth insights into their travel behaviour. The group interviews also provide an opportunity for focus group members to interact with each other as well as with the interviewers, creating an environment where they can discuss their travel experiences and perceptions with their peers.

Each session had four to eight participants and two interviewers and was approximately 45 minutes duration. Each session began by asking the students open-ended questions about the tourism and leisure activities that they had undertaken since arriving in Australia to get a general understanding of their travel behaviour. The students were then presented with images of various tourism experiences, including jet boating, kayaking, surfing and snorkelling, as well as, wildlife and indigenous attractions. They were then asked to talk about the experience that most and least interested them. Probing questions aimed to elicit insights into their reasoning for their views and beliefs about the experiences. As part of this probing, perceived barriers and limitations to engaging in the experience were also discussed.

### **4.1 Key findings**

#### **Destinations**

Most students were interested in visiting or had visited capital cities, mostly Sydney and Melbourne. They were also keen to visit iconic tourist destination, with the Great Barrier Reef and Uluru mentioned most frequently. They choose these destinations because that is what they know and are seen as iconic destinations. They did not tend to visit regional destinations and most students had not been outside of the capital city or major urban centres, such as the Gold Coast. This behaviour reflects their behaviour in China, where they tend to live in cities and do not often visit rural areas and prefer tourist destinations with

some famous attractions. Many had never been outside of a major city in Australia they did not know what was out in the regions and never thought to consider it. For instance, one student commented:

*“Because in China, outside of the city in the countryside – it just means it’s underdeveloped. So people just are relatively so poor, they just do farm work.”*

However, some students had been on a road trip to regional areas, often, this trip was taken because a friend had invited them. It was unexpected, but they found it really enjoyable, to participate in a ‘tour’ of Tamborine Mountain, or experience an art trail or the wineries in Victoria. One student commented:

*“I just found out about the tour by talking to my local friends and they introduced me to everything, if they hadn’t introduced me to other attractions within the local area I would have only stayed in the city.”*

The notion of getting out and dispersing throughout region areas is not particularly attractive for these visitors. They tend to want to stay in the developed areas and see city/urban places.

Many students had only limited prior experience with Gold Coast tourism product and most students had not experienced any adventure tourism product (such as surfing, jet boating and kayaking). Most had visited Gold Coast theme parks. The majority of their leisure time was spent shopping or visiting Surfers Paradise where they liked to “hang out” and look at the beach, but not swim.

### **Travel behaviour - influences**

The majority of students travelled with friends, usually classmates, from their own nationality. This was particularly the case with Chinese students who tended to travel with other Chinese students. European students travelled more and with people from diverse countries. In some instances a Chinese student - usually a better travelled Chinese student - would travel with students of other nationalities. However, if this was their first foray out of China and first international experience, they tended to travel with people of the same culture. An interesting common trend was for many students to visit friends and relatives in other states. The students saw this trip as an opportunity to have free accommodation, which made it more affordable. Additionally, the local knowledge of the person was an asset. For example, if their friend was studying in Melbourne and they went to visit them, they had local knowledge of Melbourne and therefore perceived it to be a safe destination.

The participants were asked when they travelled. During the academic semester Chinese students tended not to travel much more than on an occasional daytrip. The majority of students would only take an extended trip, such as a multi-night trip, after the end of semester. The focus groups were held in the lead up to the Easter vacation period, and students were questioned about travel plans during the Easter vacation period. Very few planned to travel during the mid-semester break because they were studying; the students used that time to catch up on their study and their assignment work. They would only travel at the end of semester, during June/July and between November-February.

The research revealed that the main influences on travel behaviour were friends – and most of these friends tended to be classmates. When asked about factors influencing their decision making, most were face-to-face conversations, conversations carried out in between classes; having a cup of coffee and sharing travel stories, rather than dialogue by social media or email. It was during these periods of conversation that the students found out about safe and interesting places to travel. For instance, one student comments:

*“Someone I know had started talking about that. It was a Chinese girl who went there before and I just overheard her conversation.”*

Similarly, another student states:

*“.... people liked talking about travel. When I’ll meet someone, I’ll say oh, did you go on a holiday? Have you got a holiday planned? Things like that. It’s very easy to talk about holidays with people in Australia.”*

The results show how important social influence is on the decision making process for the international student, and travel is a subject they could find some commonality of discussion point on, so they tended to talk about travel quite a lot. Participants thought advertising campaigns tended not to influence their decision making process.

Social media was also somewhat influential, mainly because the students liked to share what they had experienced while they were in Australia. The research investigated social media and how the students were sharing, as well as, what channels or platforms they were using to share travel information. Most participants had a Facebook account and, for the Chinese students, a Weibo account because Facebook is not accessible in China. They used both accounts, for example, if they had a photo with a koala, they would upload it to their Facebook as well as their Weibo account. The students tended to talk to friends that they had made while in Australia through Facebook and talk to their family and friends in



China via Weibo. The research did not uncover evidence of use of any other social media platforms, such as Instagram and YouTube.

Critical to the travel experience for the student was the desire to *show* people what they were doing while they were in Australia. Thus, pictures were more important than words. The students were not blogging about their travel experiences; however they wanted interesting photographs of themselves actively participating in the experience and used those images to send to others back home. They wanted to show people that they were seeing and experiencing Australia, they were not just studying.

The research highlighted the importance of the travel agent in the booking and influencing process. Often, the student had already decided which destination they would travel to but they required the assistance of a travel agent to assist with the itinerary planning. STA and Flight Centre were the most popular booking agents. They would go to the travel agents and say:

*"I want to go to Melbourne. I want to book an airfare and accommodation and then what should I do while I'm there?"*

Visiting parents were also identified as a perhaps untapped market. Previous research has shown that many international students will bring at least two other visiting friends and relatives to Australia to visit while they are studying (Davidson et al. 2010). A lot of the students' parents visited, usually during graduation, with the parents' itinerary planned by the student. Sydney usually featured within the itinerary in addition to local experiences. The research found that parents of the Chinese students in particular had a strong influence on the student's travel behaviour. Initial assumptions were that the parents would have a negative influence in the student's travel; however, it was interesting to note that the parents were extremely supportive of local travel.

When the group was asked why they came to Australia initially, and if travel was a part of that decision making, it became clear that study was the main reason they came to Australia. The Chinese students in particular didn't really think about travel as part of their study experience within Australia, travel was a consideration upon arrival. The sample showed that the students tended to lead quite a sheltered and quiet life in China. They were quite studious and stayed at home. We found that the parents use the study experience in Australia to encourage their children to gain some world experience too. For instance, one student explains how her parents wanted her to:

*“Go out and travel, go and see the world, go and see Australia. This is going to be great as part of your life experience.”*

Another student comments:

*“... my parents say ‘You should always travel. Please don’t stay at home, send us pictures of you doing things.’”*

The parents influenced not just the motivation to travel, but also the destination and activities. Some respondents said: “I just follow my parents’ ideas”. The parents would say “you should go and see Sydney” or “you should go and do that”.

In some ways, the parents are living through their children because it gives the parents social capital to talk about their children exploring Australia whilst they are studying. Additionally the parents were willing to financially support their children’s travel; however, some students also maintained part time employment to finance their travel.

#### **Experiences - relating experiences to things they know**

An interesting and unexpected finding of the study related to the student’s experiences of things they know. It is well established in psychology that individuals have a way of seeing the world and a schema of how thoughts and actions are organised. The study found with the Chinese students, that sometimes they didn’t understand experiences in Australia because they had never come across them before. For example, they had never come across a jet boat ride and, therefore, did not understand what it was. They did not understand about surfing because they had never previously considered the activity.

On further questioning it was determined that the student needed to relate the activity to something they were already familiar with. For example, the Chinese know that the panda bear is an iconic Chinese animal and that other people around the world come to China to see the panda bear. Therefore a way of introducing koalas to them would be start to understand how Chinese present the panda bear, and how they think about the panda bear, and then try to present the koala in a similar way. Thereby using the existing knowledge schema, or way of organising and viewing the world, and then take that and view the koala.

Another example is indigenous bush medicine. They understand Chinese herbal medicine, therefore, if the concept of bush medicine is presented in a similar way to their understanding of Chinese herbal medicine, and then they could start to understand that concept better. A similar framework can be adopted for indigenous dreamtime stories – the

Chinese culture has a strong history detailing Emperors and myths. If a tourism product incorporates indigenous dreamtime then it must look to relate back to the myths and the legends in China and then start to talk about how that relates to the dreamtime stories. To launch into dreamtime stories was too big a jump for the Chinese visitor; they needed those building blocks to base a story on.

### **Adventure - contrasting views on adventure**

When asked about adventure, travel behaviour and travel experiences the research found two distinct groups:

1. Conservatives, and;
2. Adventure seekers.

We can estimate from the focus groups and the quantitative research discussed below, that approximately 10-20% of the Chinese international student market – and possibly the international student market more generally - were adventure seekers. The majority of the international students were quite conservative. There were only a small proportion of students who sought out high adrenalin adventure experience. Comments from the conservatives, when asked about adventure included:

*“Adventure things are against our Chinese culture.”*

*“I think most Chinese don’t have a spirit of adventure.”*

However, other comments stated that:

*“Chinese really want to try new and exciting things.”*

Therefore, it is not conclusive that adventure cannot be sold into the China market, however managers must be aware that the percentage of Chinese that are at the adventurous end of the scale is probably less than those at the conservative end. Across both groups, safety or *perception* of safety is paramount. Tourism product needs to be conscious of how they communicate the sense of safety; both in marketing collateral and at the point of delivery.

### **Water-based activities**

It was highlighted that most of the information about the beach and water came during their university orientation - and students believed what was told during orientation. Tertiary colleges have a duty of care to their students, however the information presented tends to

instil fear within the students, for example, swimming between the flags, rips in the water and stingers. Steps to change the messaging during orientation with more positive spin would prove beneficial. By educating the students on where to swim and what not to do, instead of advising them not to participate because it is dangerous would be far more beneficial.

It is worth noting that the beach was a very strong attractor for coming to the Gold Coast and selecting it as a study destination. They really like the beach, but most of the time, they just tended to look and visit the beach, they did not actually enter the water.

## **Surfing**

The research suggested that the group was interested in surfing but it was perceived as too difficult. The idea of surfing, or standing up on a wave, would be a significant goal achievement. To send a surfing image back home was seen as something to provide social kudos. It is quite interesting that often the thought process in undertaking an activity relates to perception of the activity rather than the reality of it.

The research in to water-based adventures uncovered an interesting point. Predominately amongst the China group, but somewhat across some of the other countries as well, there was an unfamiliarity and fear of the water, which was prolific across the groups. Many were fearful because they couldn't swim and there was a considerable fear of the surf because many had never experienced it before. Many of the countries where they lived had still water. They might have ventured into that somewhat, but then, adding a surf dynamic it becomes quite difficult. This was interesting because the beach was the main attractant for them to choose the Gold Coast to study over a number of other destinations. Yet, all they wanted to do at the beach was stand there and look across the sand at the water and leave, and that made them happy.

One comment regarding how the student might assess the safety of the ocean highlighted the importance of third party endorsement:

*"Maybe search online and have some feedback on Facebook or someone else sharing their experience online saying it's safe."*

Interestingly, this wasn't just with water, there was a fear of anything to do with staying at a hostel, if a third party could tell them that they would be safe then they were accepting of it.

## **Water-based touring**

There was varying levels of familiarity and interest with jet boating and kayaking within the group. More than half of the students were unfamiliar with the activities until they were showed images; many had never seen a jet boat or kayak before. A number of students indicated that they would like to see the sights, famous homes, and see the Gold Coast from a different perspective. They liked the idea of being out on the water and seeing the high-rises and the Gold Coast from the water. They really wanted to see the wildlife. For jet boating, with the Asian students, the focus was on nature and scenery rather than thrills and adventure. Again the perception of safety was important.

There was some concern, particularly female Chinese students, regarding the perceived physical exertion and their ability to successfully participate in a kayak experience. They didn't mind getting wet while on an experience but they were fearful of the thrill element of the jet boat and the open water of the kayak.

Sun exposure was also a concern. The majority of students were concerned about getting sunburnt because they didn't want to get brown, they wanted to stay whiter. Elements such as sunscreen and hats and the perception that they were not going to get sunburnt were important. If someone gets sunburnt on tour, despite having had an enjoyable experience, then they will be quite negative about the experience itself, operators must be mindful of this.

## **Wildlife**

From a wildlife perspective, the *cuteness factor* of Australian wildlife is important to the Asian market. They want to see iconic wildlife, particularly koalas and kangaroos, to take photos to send home. The opportunity to have a photograph with the wildlife outweighs just seeing an animal, as the social credibility in sharing the photos with parents and friends is significant.

Participants were asked about snakes and spiders. They thought that these were scary and dangerous, but in a non-threatening way. It was perceived as exciting to have held a snake at a wild life park. Interestingly, the concept of a sanctuary was foreign as the majority of the group were only familiar with zoos. The ability to touch and feel and be closer to the animals was a positive differentiating point.

## **Technology**

The majority of students had smartphones. They used them mainly for travel to take photos and also to get around and find locations. They wanted to be able to navigate around

attractions using their map and GPS type navigation, as their map reading skills were limited and they wanted technology-based interpretation and translation which focuses on imagery rather than text.

### **Accommodation**

The research showed that most of the students mainly stayed in hotels or with their friends, however some stayed in hostels. There was an interest in staying in hostels, but they didn't really understand what a hostel was or they had never stayed in a hostel previously. Hostels are attractive due to cost and the ability to meet other people. They also liked the idea of cooking their own meals. However staying in hostels is not something they are currently doing as part of their domestic Chinese travel behaviour, they tend to stay in hotels because they know and understand a hotel.

## **5. Activities with Chinese International Students**

During the focus groups the students were shown images of the activities and were given the opportunity to sign up and participate, interestingly it proved difficult to encourage the students to participate in a number of activities. If they were interested then they were able to undertake the experience for free. The following activities were available for participation:

- Surfing lesson
- Jet boat tour
- Kayaking tour
- Wildlife sanctuary visit

### **5.1 Surfing lesson**

The majority of students had never surfed before and likened it to snowboarding. The perception was that the activity was difficult and they did not expect to stand on the surfboard. Key learnings from this experience highlighted the need for photographs of the participants surfing, to enable them to share these images with friends and family. There was also a requirement for the provision of long sleeve rash vests to protect against the sun. Students were looking for group discounts and only wanted to pay \$25 for the experience. They also wanted information before the trip on sun protection as many Asian participants were very concerned about sun burn, resulting in the darkening of their skin. Darker skin was associated with farmers and agricultural workers who were perceived as lower class than Asian international students were from cities and middle to upper class families who preferred fairer skin to represent their social status.

There was a lot of excitement and people were proud and satisfied because they confronted their fears of the activity. They really did not expect to stand up on a surfboard, so when they did stand, it was a moment of great joy. The professionalism and enthusiasm of the instructor also rated highly.

### **5.2 Jet boat tour**

There was limited knowledge of the jet boating experience and, accordingly, they did not discuss their expectations, but at the end of the tour they were full of excitement and joy. It was better than they expected.

Possible improvements of the product included reinforcing to the guest how wet they will get during the trip and the need of sun protection (for the reasons mentioned above).

Incorporating a stop off point to allow the passengers to disembark and walk around was also preferred. It was also noted that the safety bars were slippery and one participant felt unsafe. Passengers also wanted a more leisurely trip back to vary the experience. Most students planned to share their photographs via social media and in person. Despite being the most expensive experience of the study, the perceived value and price was acceptable to the students. There was also discussion about packaging jet boating with other similar adventure product, such as jet skiing or parasailing. Now that they knew about the experience (and knew it wasn't too scary), some participants also indicated that they would be interested in bringing their Chinese parents to experience jet boating when they visited Australia.

The driver was a high point due to his interesting commentary and his genuine concern for the wellbeing of his passengers. The possibility of seeing wildlife, such as dolphins on the tour was extremely important. The students noted that this was a tour they would like their parents to experience, however suggested that a shorter, less adventurous tour might be more suitable for older parents.

### **5.3 Kayaking tour**

There was good knowledge of the product with some students having participated in kayaking tours previously. Picture sharing was important, however, this proved challenging as the guide recommended not taking cameras, which would have got wet. They did not want photos standing near the water they wanted action shots to share with family and friends.

The group wanted maps of their route and information on the wildlife that they might encounter. Some of the group wanted the tour to be more interactive with a race, listening to music, and an additional guide, as they wanted to be close to someone all the time.

The group felt the tour was overpriced and indicated they would like to do it again, but they might hire their own kayak and guide themselves.

They felt that kayaking was strenuous activity and at completion felt a sense of accomplishment.



#### **5.4 Wildlife Sanctuary visit**

The knowledge of the sanctuary was quite foreign to the Asian students, although they had been to zoos, they thought Currumbin Wildlife Sanctuary was unique because they have never been able to touch animals before. They were also surprised that the Sanctuary offered shows where you could see the animals up-close, hear presentations and observe their behaviour, such as a bird show, that weren't offer in the zoos in their home country or places they previously visited. The sanctuary generally met expectations, but they wanted more animals.

Non-Asian people thought that there should be more animals and more value adds, they wanted more contact with the animals. One issue identified was public transport; one of the students missed his stop because the bus driver did not say, "next stop, Currumbin".

The group had difficulty reading the Sanctuary map and would have liked to see an interactive App with more information. They wanted a pop up menu to provide information on key shows and activities within the sanctuary and provide directions to animal enclosures.

The concept of a sanctuary and a wildlife hospital rehabilitating animals was positive. The Sanctuary is not for profit, and the environmental factor was something that they really liked, something they weren't expecting to find. Further emphasis of the role of the Sanctuary in rehabilitation and conservation of native animals would be viewed positively.

The Asian students rated the train highly and suggested a possible improvement of including a tour guide to show them around the park and interpret everything for them.

The lack of Asian food options in park was also noted. They wanted a hot meal of rice or noodles and were not keen on the cold food offer of salad and sandwiches or the Western-style hot food options available. Accordingly, many Asian participants chose to not eat or bring their own food on the trip.

Sharing was mostly on Facebook and in person, getting a picture of a koala was important.

While the price was acceptable, it is an activity they would only want to do once. They do not want to pay extra for add-ons. For example, although they desperately wanted a photo of themselves holding the koala, they did not want to pay the money for it.

## **5.5 Summary**

Word of mouth and imagery is very important to the international student, as is sharing the experience on social media with family and friends. Experiences should be unique but personal and safety is very important. The quality and safety of the experience can be reinforced through accreditation, memberships (such as membership of the regional tourism organisation), awards and government accreditation/registration. Badges and logos associated with these programs should be prominently displayed on the operator's websites and at their location. The focus group was price and value conscious and all-inclusive seemed to be important. For example, the price including entry and a photo. A caring leader/instructor was important, and the group looked to that person for guidance, advice and information. Offering Asian food and beverage options would also encourage more meal and snack purchases among Asian guests.

## 6. Quantitative Surveys

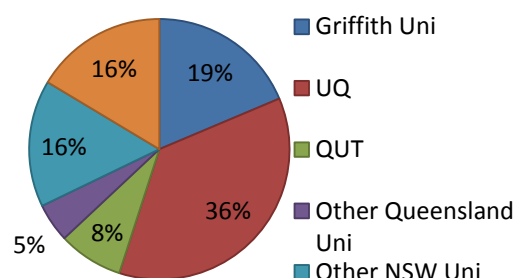
Based on feedback from the qualitative studies, each business partner identified a number of innovations or changes to be made to their business and these were tested with both international and domestic students.

The international survey was completed by 366 international students living and studying in Australia, with 94 males and 226 females.

### 6.1 International student demographics

- Almost 80% of respondents said that their home country was China.
- 87% of students were enrolled at Bachelor level or above.
- 57% of students were studying in Queensland, 13% from NSW and 14% from other states.
- Student age – 39% of students were aged between 19-21, 33% were 22-25, 16% were under 18 and 12% over 26.

**Student Study Location**

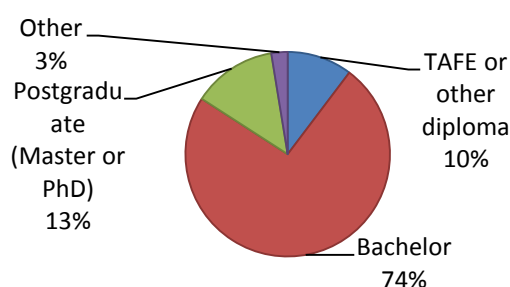


### 6.2 Domestic student demographics

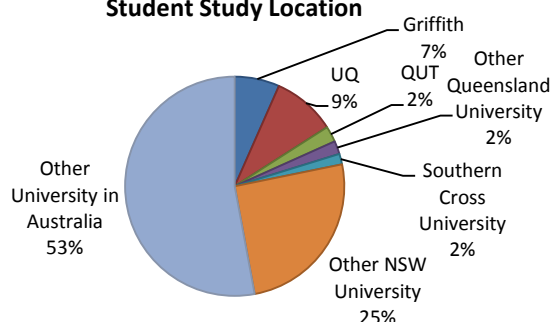
The Domestic TQUAL Survey was completed by 275 students with 57 females and 200 males.

- The breakdown of study locations in Australia was quite dispersed with half the students coming from some other university location than those listed. Twenty five percent of students were from NSW and only a small number were from Queensland universities.
- Student age – most students, 40% were between 19 and 21, 33% were 22-25,

**Level of Program Enrolled**



**Student Study Location**



19% were over 26 and only 8% were under 18.

- Most of the domestic students were at bachelor level, with only a small number in a postgraduate or diploma degree (as shown in the graph).

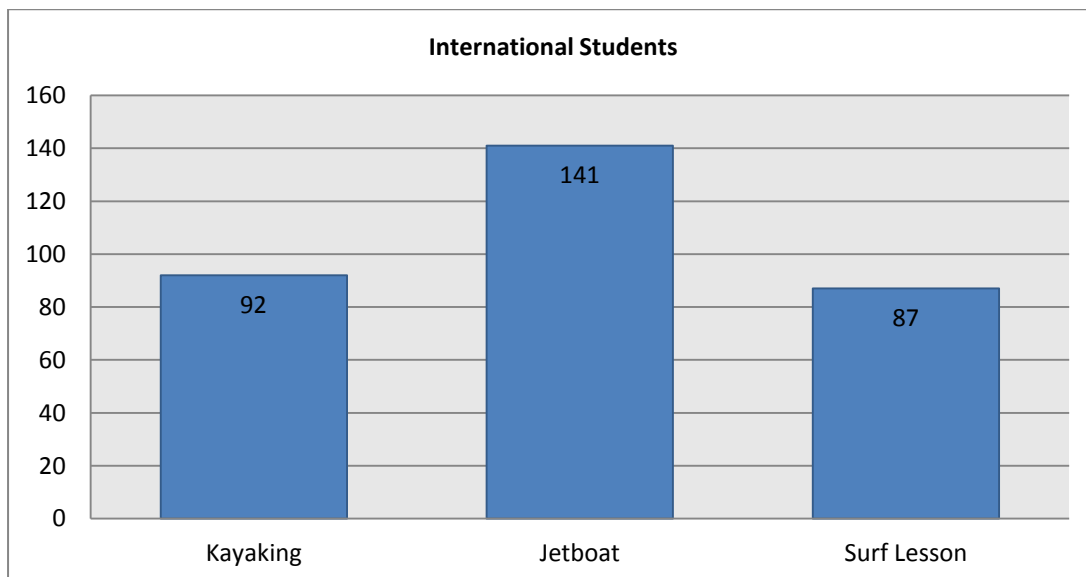
## 7. Results

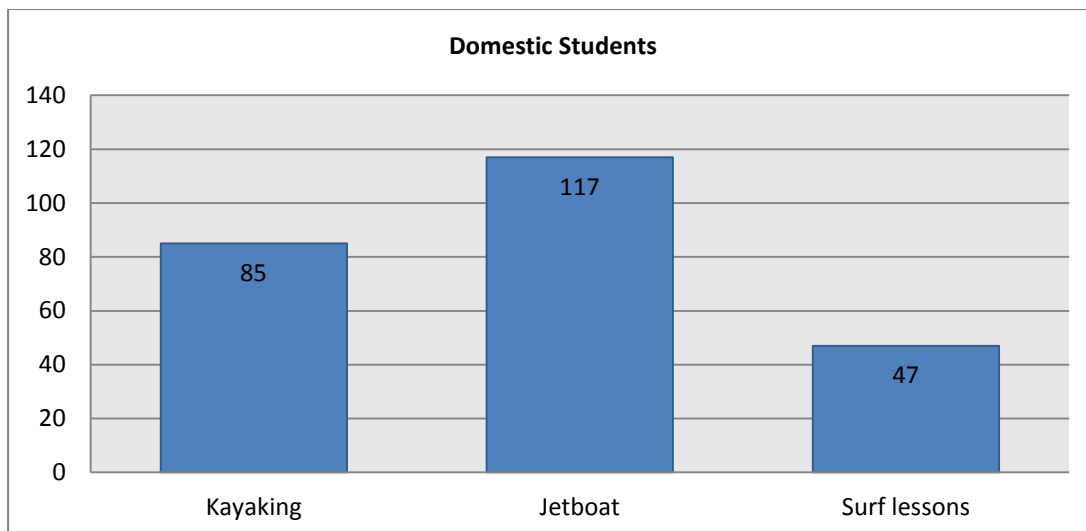
### 7.1 Most preferred activity

The survey was split into two sections. In the first section students were asked which of the three listed water based activities would they most prefer to **participate in** (as a recreational experience). Then in the next section of the survey, students were asked which of the two attractions they would be most interested in **seeing** (on a trip). The results are shown below.

#### Water activity preference

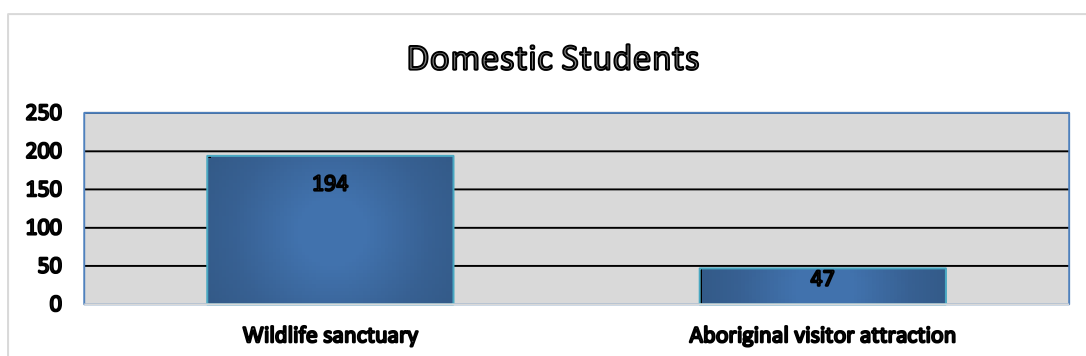
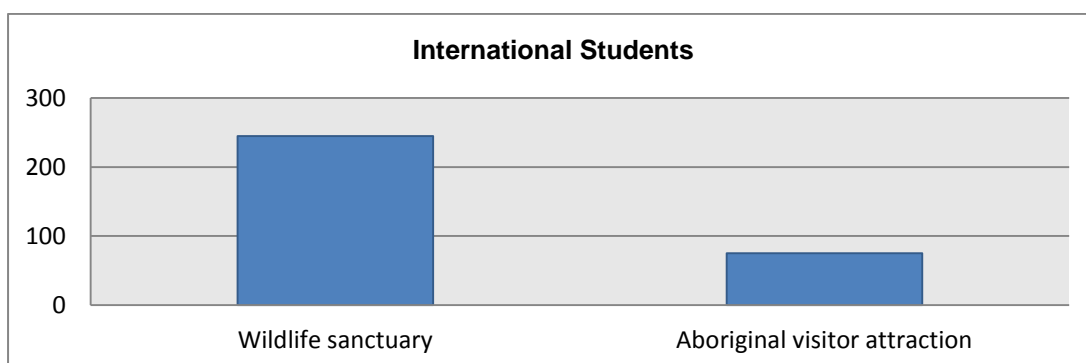
When choosing from the water based activities, jet boating was the most popular for both males and females for both international and domestic students. The preference for kayaking and surf lessons were split fairly equally for international students, but surf lessons among domestic males scored was low.





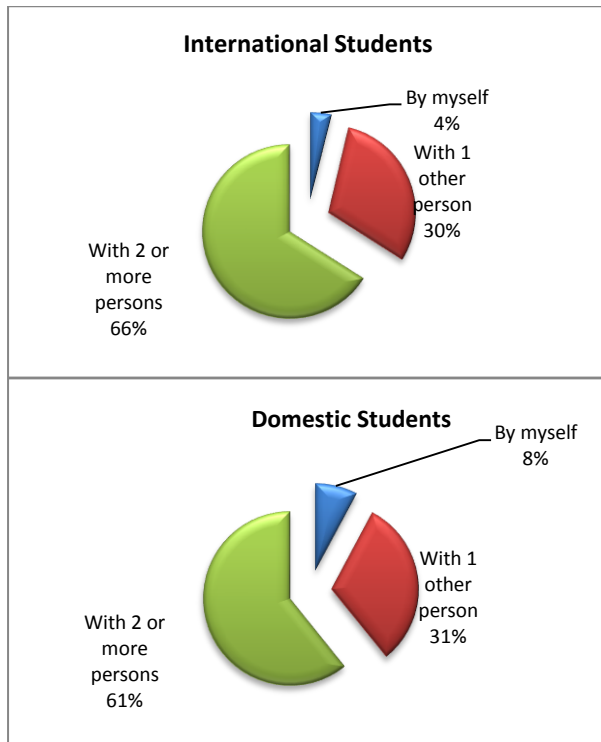
### Attraction preference

For both males and females, the wildlife attraction was the preferred activity for more than 75% of students.



## Ideal number of participants

The preference for both international and domestic students is to undertake a tourism activity with two or more friends, while about 30% would prefer to do the activity with one other person. Interestingly four (international) to eight (domestic) percent would prefer to do the activity alone.

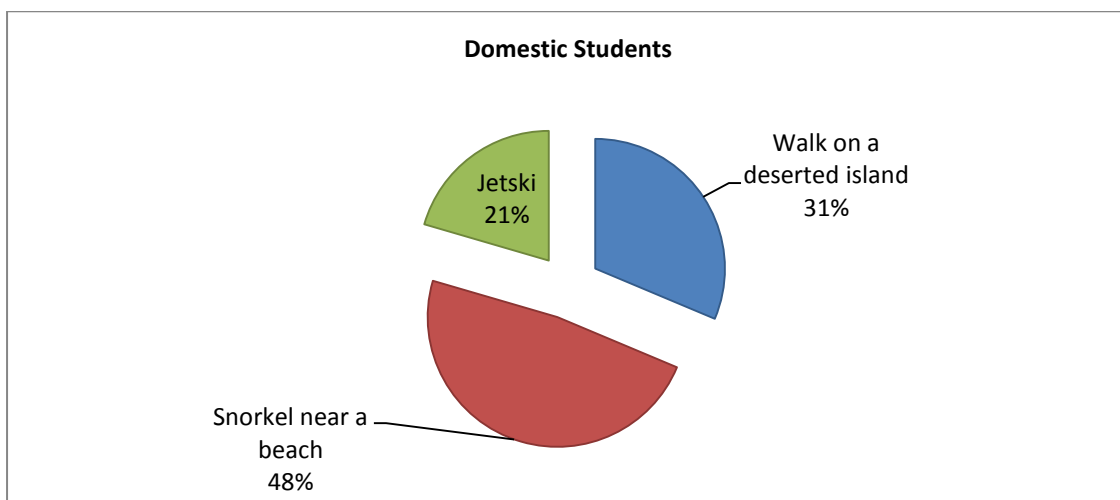
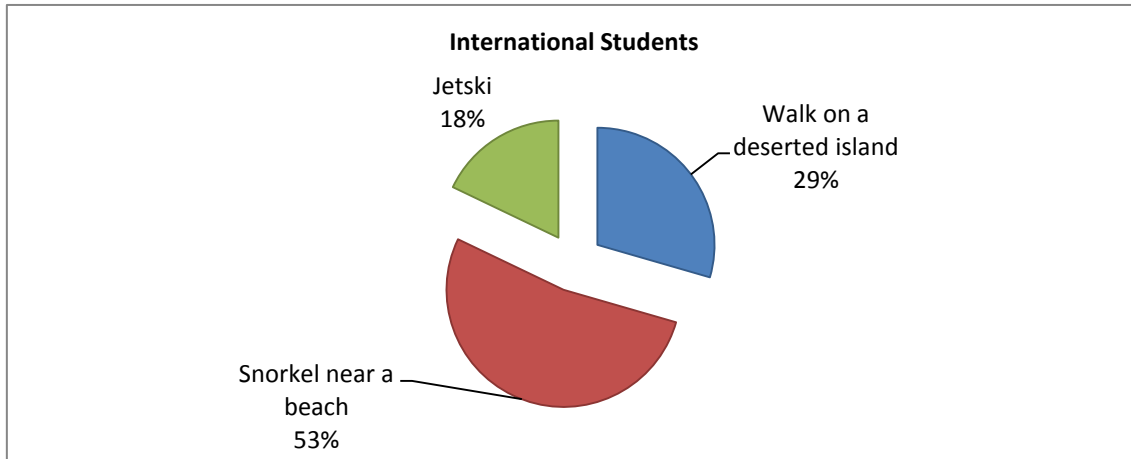


## 7.2 Water activity - kayaking

There were 99 international and 85 domestic students that indicated that a Kayaking tour was their first choice in the water based activities.

### Kayaking tour – bundle preference

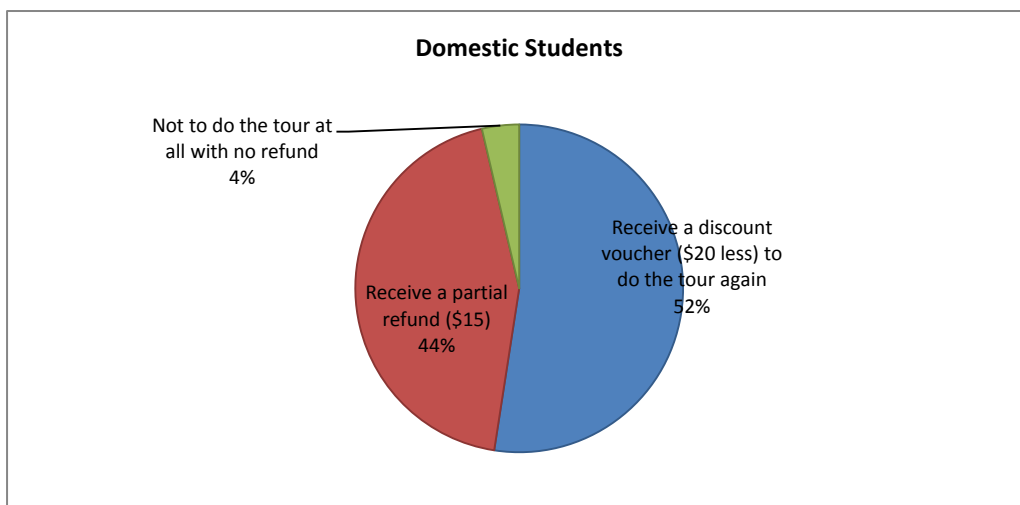
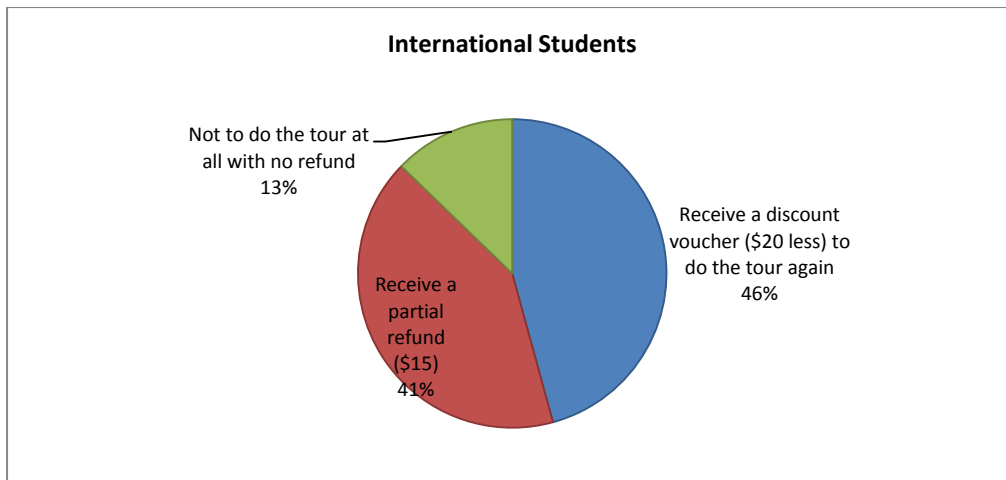
When asked, what students would prefer bundled with a three hour kayaking tour about half preferred to snorkel near a beach, with 29% and 31% preferring to walk on a deserted island and only 18% and 21% wanting the jet-ski addition.



### **Kayaking tour – weather assurance**

With most outdoor activities, weather can cause frustration and customer dissatisfaction. About half of the respondents who preferred kayaking said that they would prefer a discount voucher to do the tour again, the next preference for both groups was a partial refund. The main difference the two groups of students lay in the preference to not buy a tour if it didn't have a refund mechanism available; domestic student were less likely to choose this option than international students.



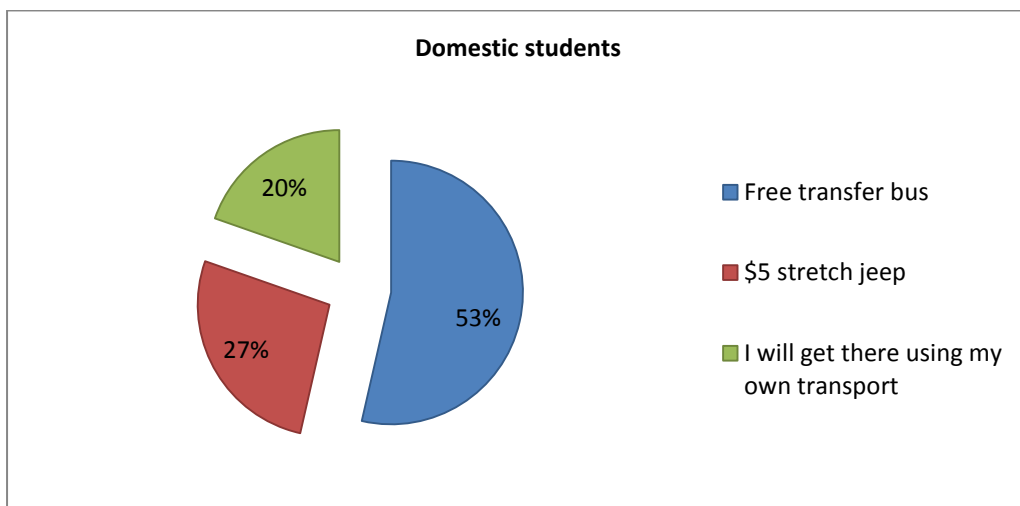
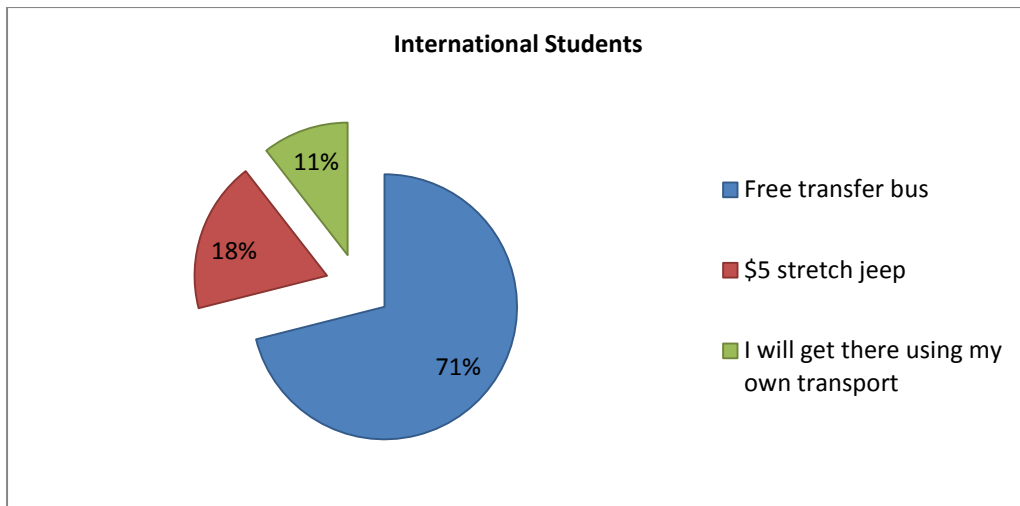


### 7.3 Water activity – jet boat

In total 164 international and 117 domestic students chose jet boat as their first preference in the water-based activities.

#### Jet boat – transfer preference

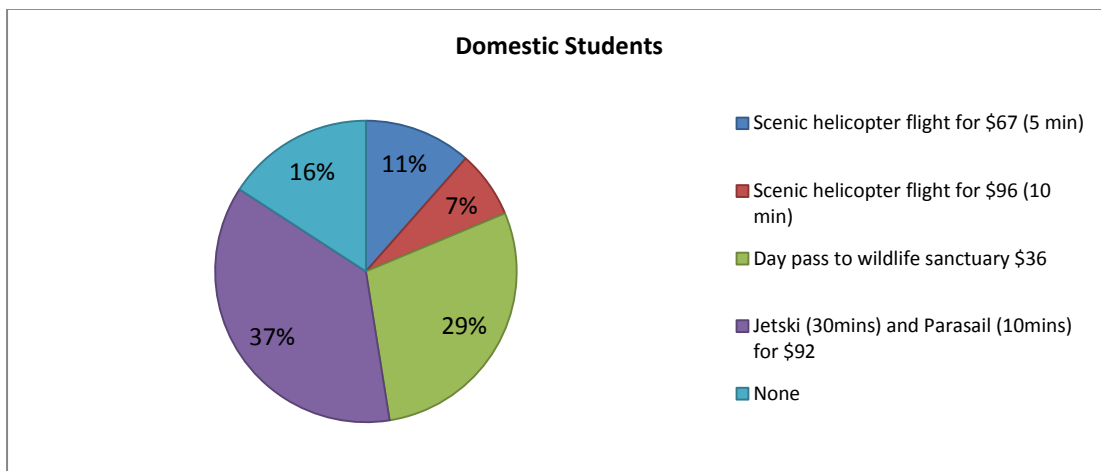
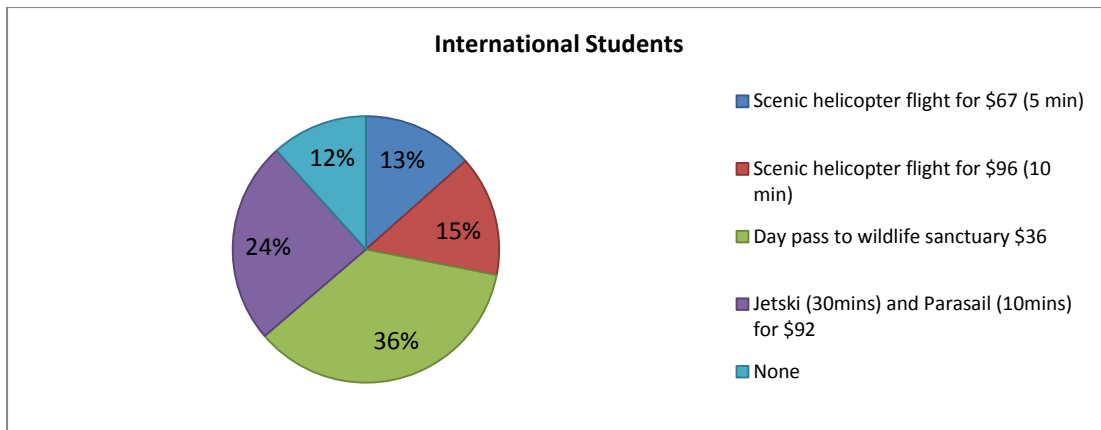
The overwhelming preference for transfers to jet boating was for a free bus; however, this option was more popular with international students. The stretch jeep at a cost of \$5 only partially scored higher than the own transport option for international students, but scored much higher for domestic students.



### **Jet Boat – add-on preference**

The add-on options for jet boating revealed some differences between the international and domestic students. When asked, what international students wanted as their preferred add-on to the jet boat tour, the majority (36%) responded that their preference was for a day pass to a wildlife sanctuary. The next preferred add-on was a combination of jet boat, jet ski and parasail. The scenic helicopter flights had the lowest preference.

However, domestic students preferred the jet ski/parasail option, with the wildlife sanctuary second. Students preferred not to add-on, rather than choose the scenic helicopter flight option.



### Preferred jet boat package

International respondents were given the opportunity to design their preferred jet boat experience. They were given options of a 30 minute or 45 minute tour and whether they would like to see dolphins or houses of the rich and famous. The preferred package was a 30 minute tour and seeing dolphins. Domestic respondents preferred this same package.

## 7.4 Water activity – surf lesson

### Preferred surfing package

International and domestic respondents were asked to design a product package with the following options:

- 1 lesson-beginner (\$45) or 3 lessons-beginner (\$120)
- A photo standing on a surf board (extra \$10) or no photo
- Money back guarantee or no money back guarantee.

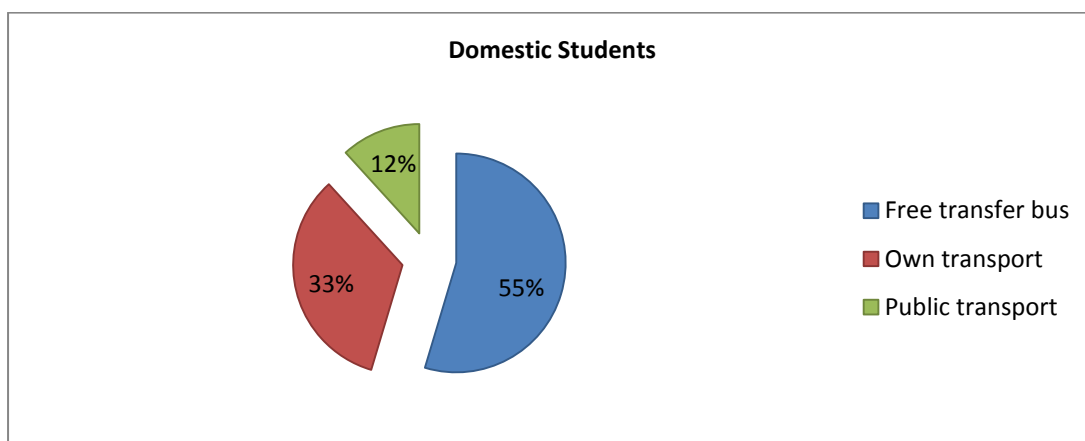
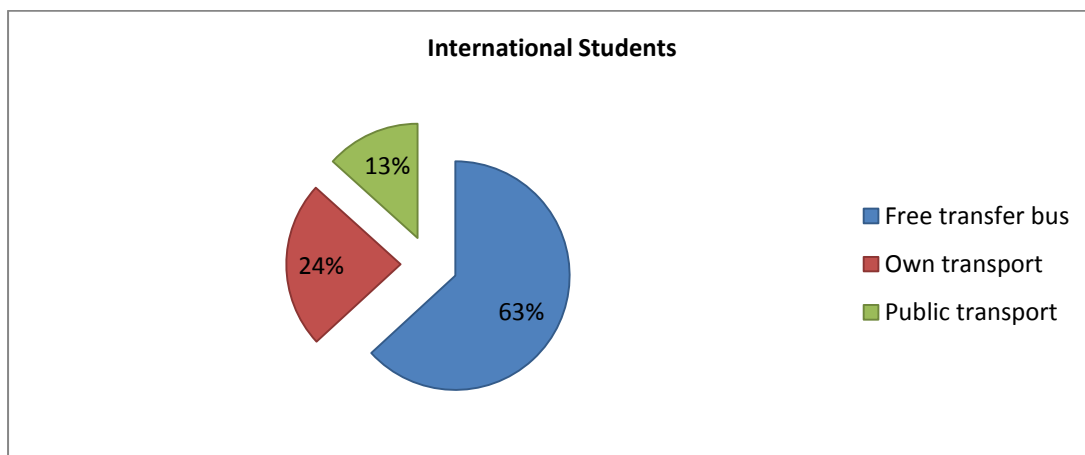
The preferred package for both international and domestic students was 3 lessons, photo and guarantee.

## 7.5 Attraction – general questions

In the second part of the survey, students were asked to respond to a variety of general questions pertaining to a wildlife or cultural attraction.

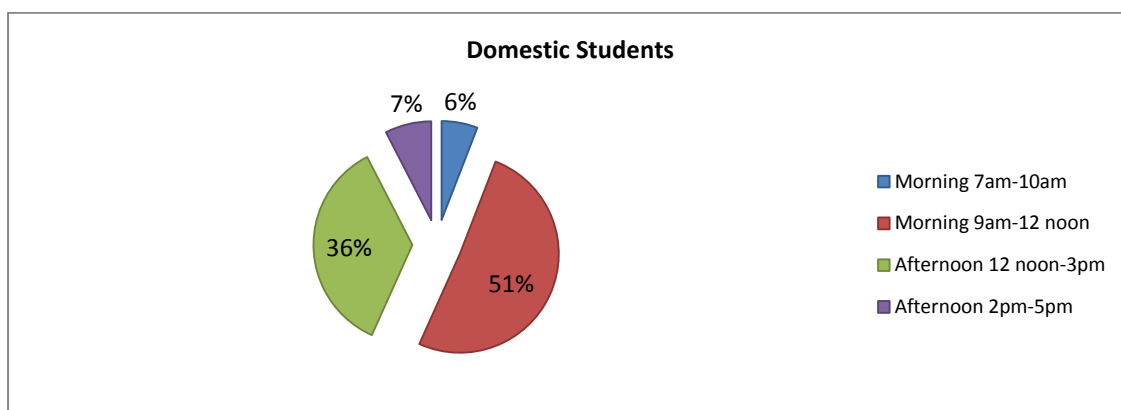
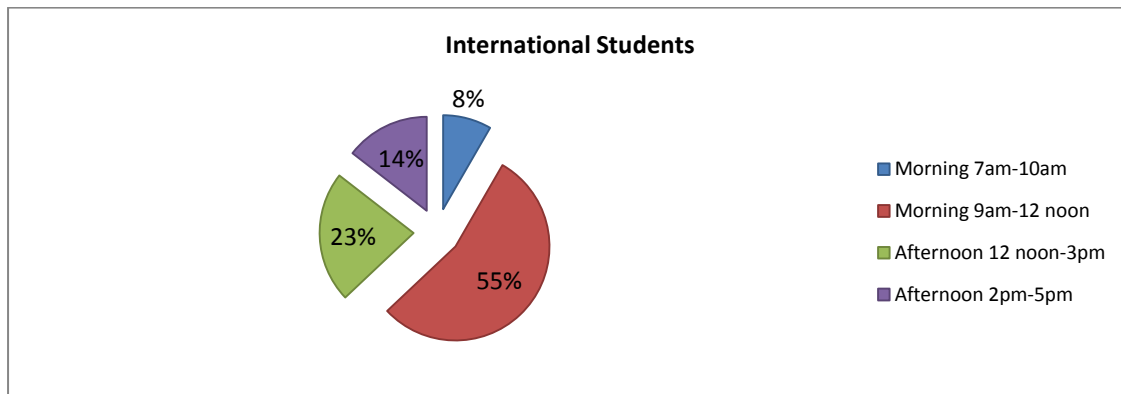
### Attraction – transfer preference

The majority of students prefer to get to the attraction by free transfer bus. This result is similar to the transfer preference for jet boating. However, in this instance a large number (24%) said that their preference was their own transport with 13% catching public transport.



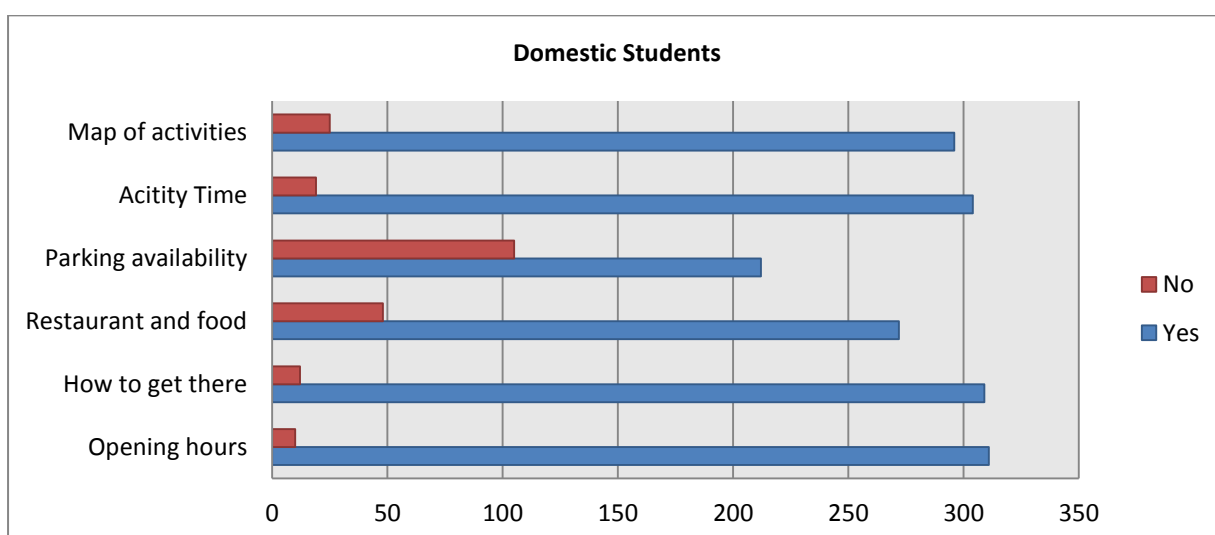
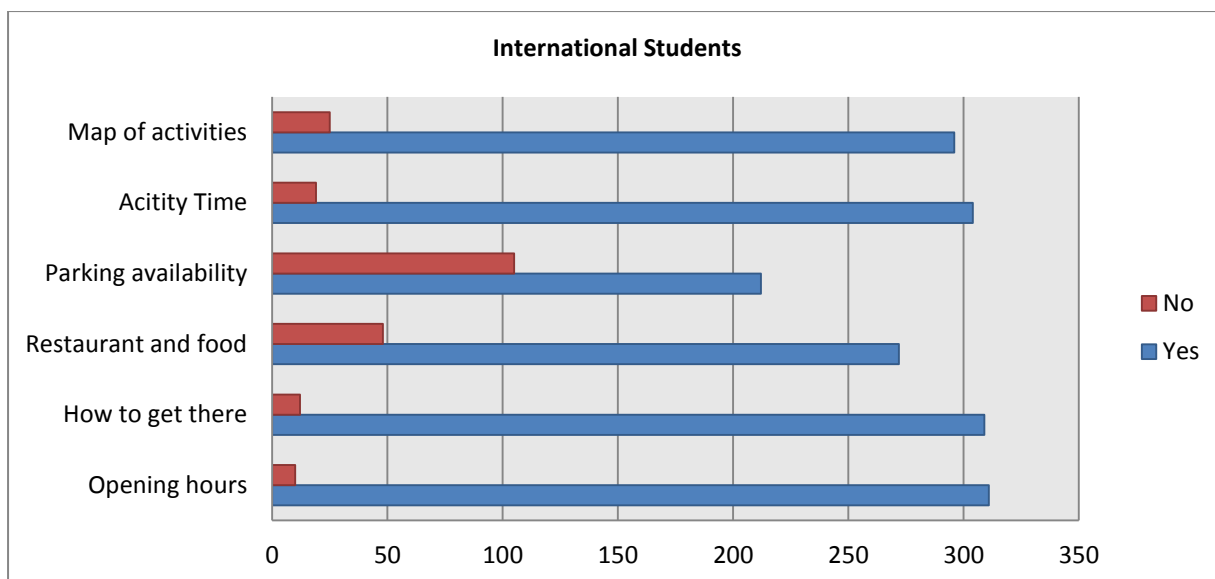
## Visiting times

When visiting a wildlife park or cultural attraction, most students preferred to visit in the morning, with the early afternoon second most popular. Early mornings and late afternoon were least popular.



## Information requirements

In most cases students were interested in having information prior to their visit to the attraction. Given the popularity of free transfers and public transport, parking availability was least important. A large number of students did not want prior knowledge of the type of food available, while all other information options rated highly.



## 7.6 Technology

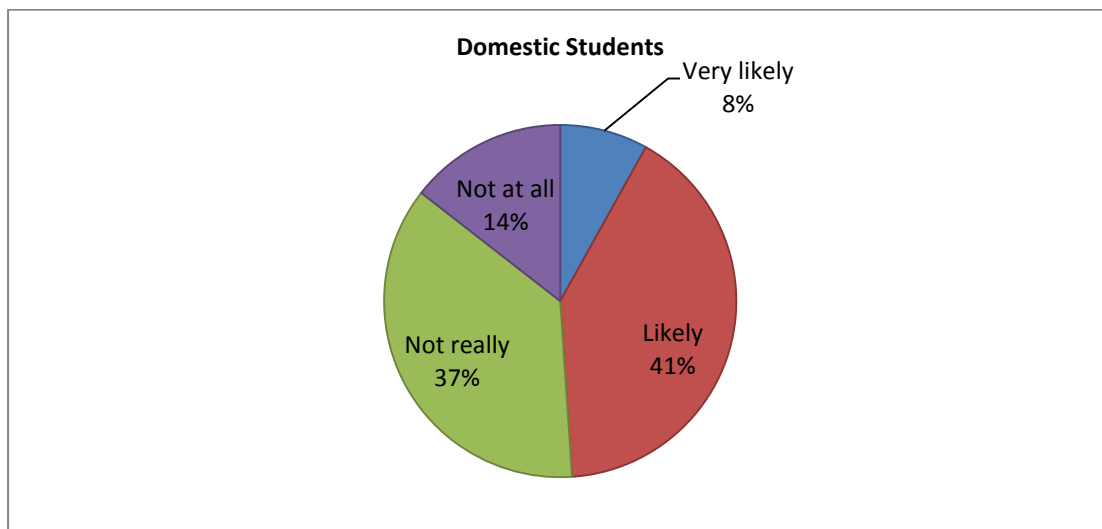
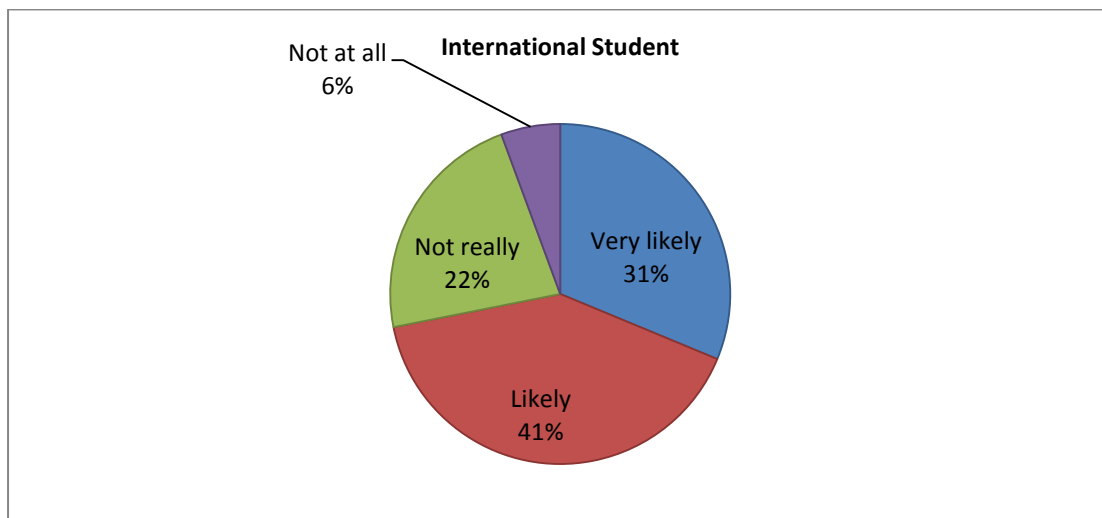
A higher number of international students have smartphones with internet connection and download. However, more domestic students have iPads and other mobile devices.

	International	Domestic
Smartphone	85%	78%
IPad	63%	74%
Other	33%	58%
Internet connection	73%	55.8%

## QR code

International students were familiar with QR code scanners and 64% (235 students) had the app on their phone with 57% having used it previously. When asked about the likelihood of them using the QR codes to learn more about an exhibit at an attraction, most students indicated that they were in fact likely to do so, with only 6% indicating that they would not.

Domestic students were less familiar with QR code scanners, with 44% knowing how to use one and 36% having used one before. The graph below shows that domestic students are less likely to use QR code scanner to obtain more information on displays or exhibits.

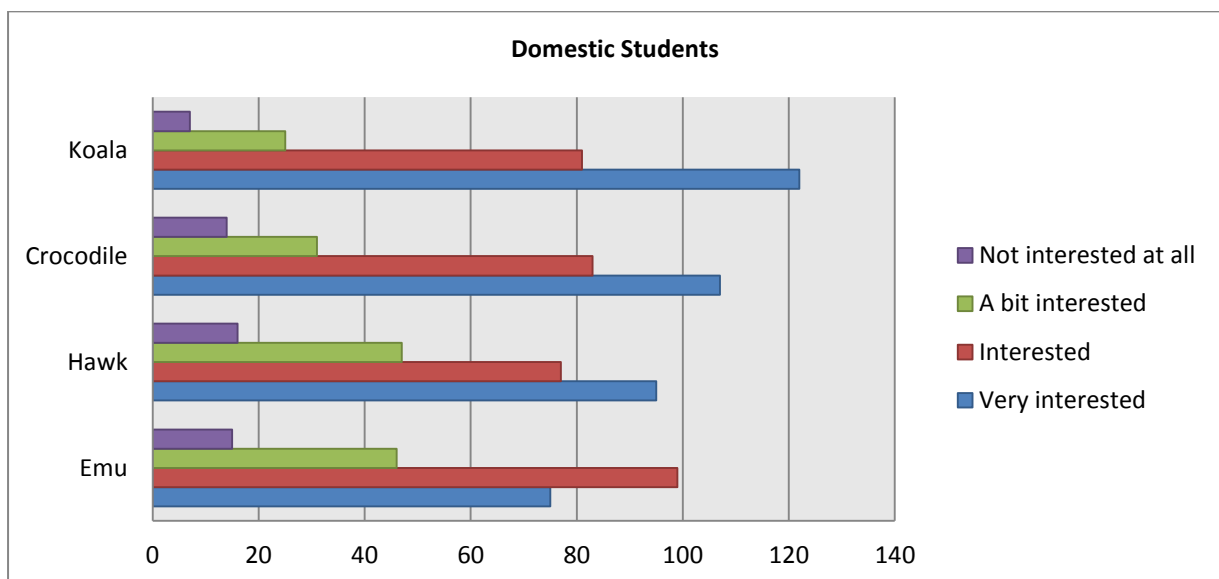
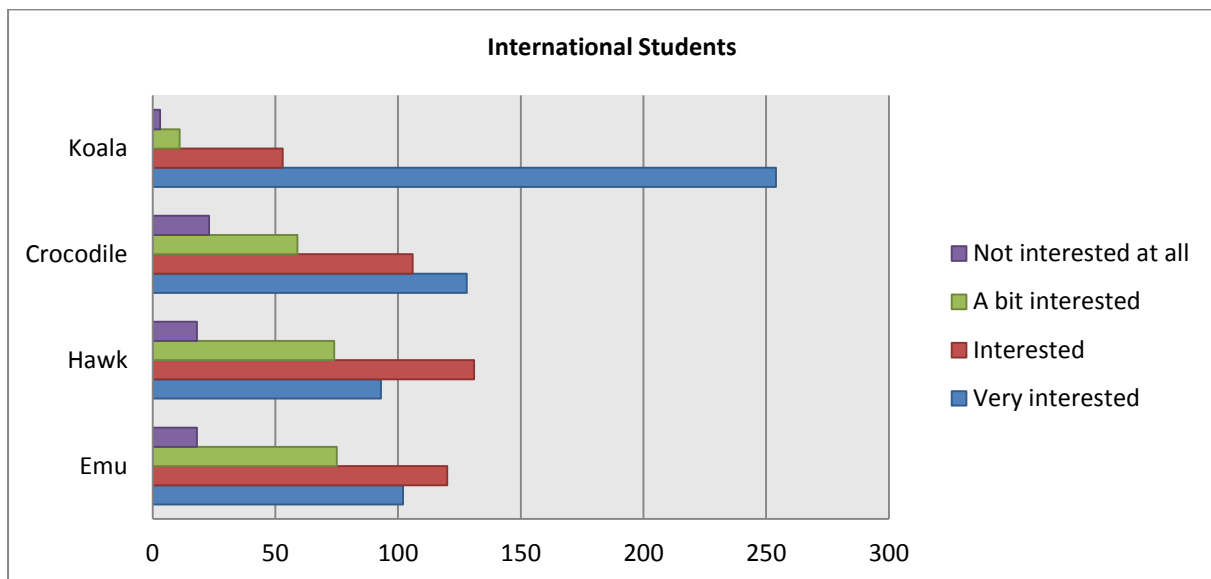


## 7.7 Animals

### Level of interest in seeing animals

International students were then asked about their level of interest in seeing a koala, crocodile, hawk and emu ranging from “very interested” to “not interested at all”. It is no surprise to learn from the graph below, that most students would like to see a koala. The three other animals had a similar level of interest.

While domestic students were slightly more interested in seeing koala's, their interest in seeing the other animals was also comparably high.

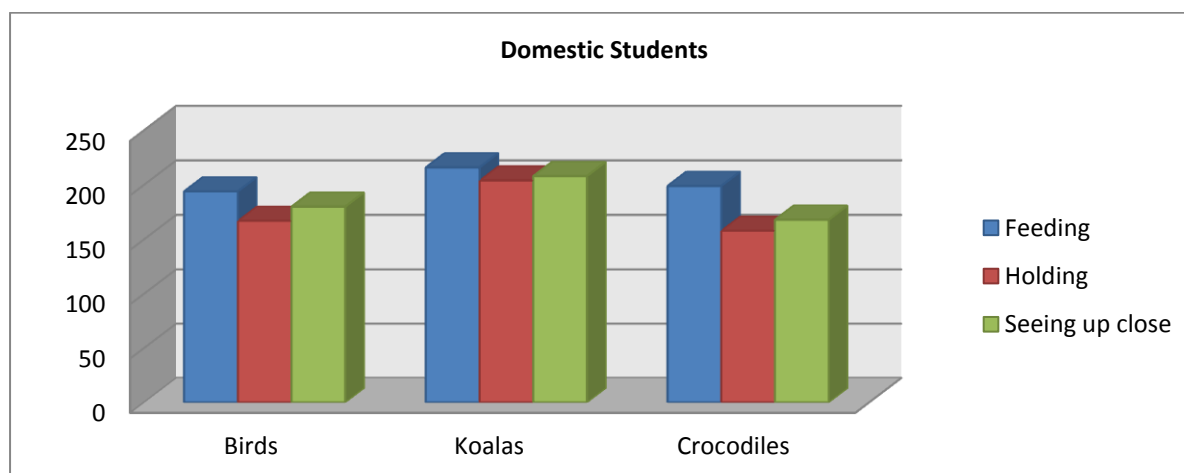
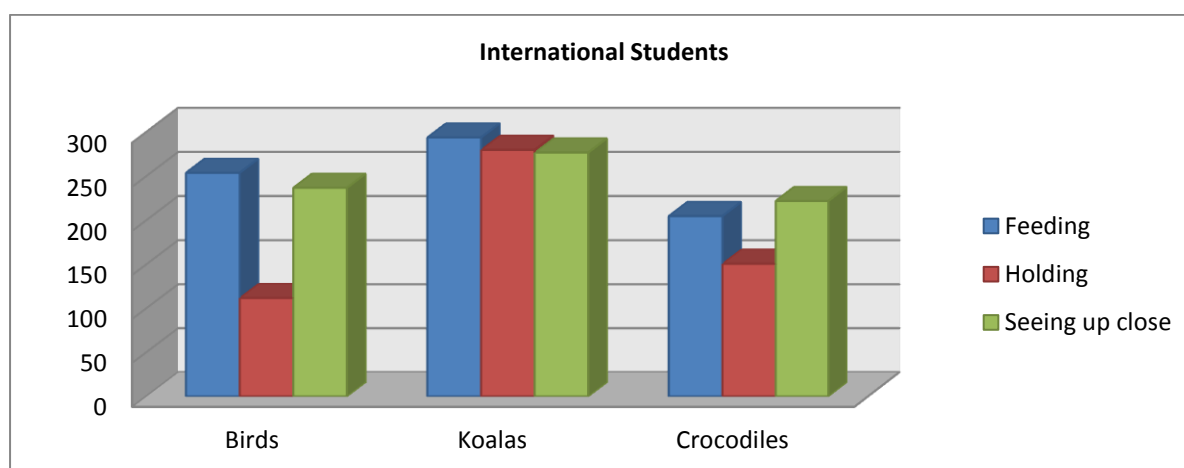




## Level of interest interacting with animals

For international students, all levels of interaction with koalas rated highly. However, while students were keen to feed and see birds up close, there was much less interest in holding them. The interest in interacting with crocodiles was less than the other two animals, but students seemed to want to interact with them in a variety of ways and not only look at them.

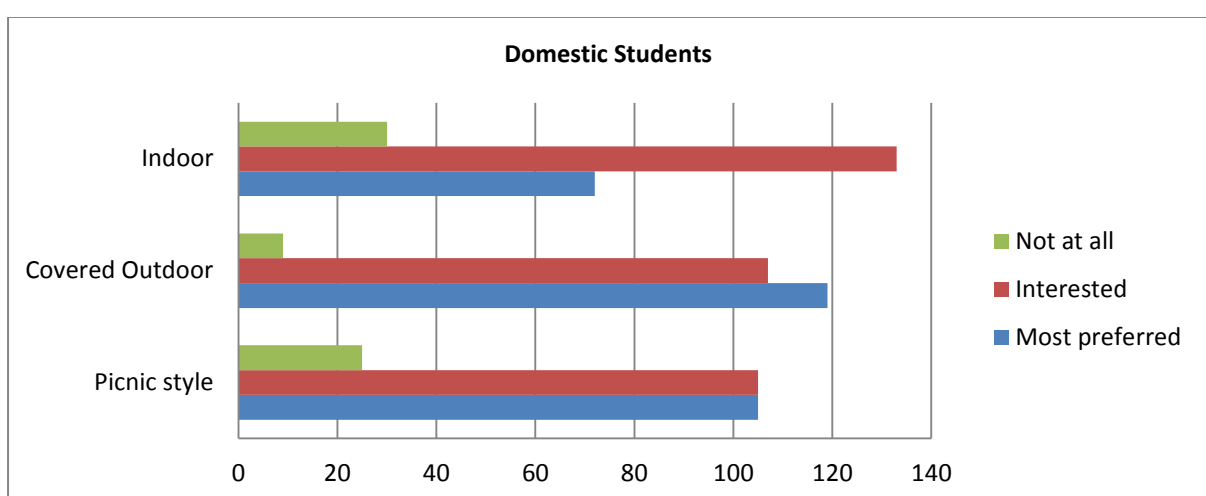
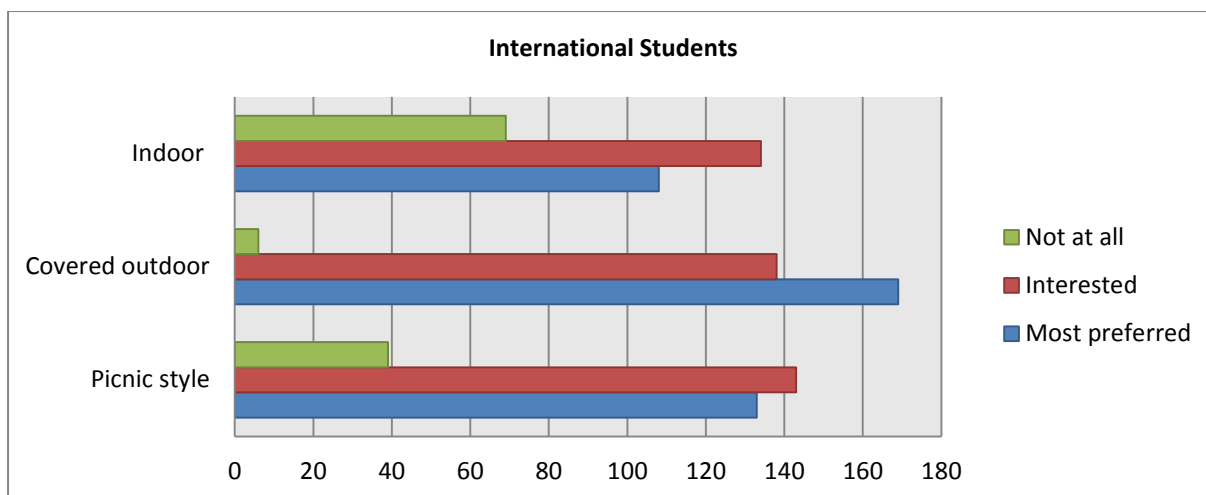
Domestic students interest in the animals was comparable and also in the variety of ways that they would like to interact.



## 7.8 Eating at the attraction

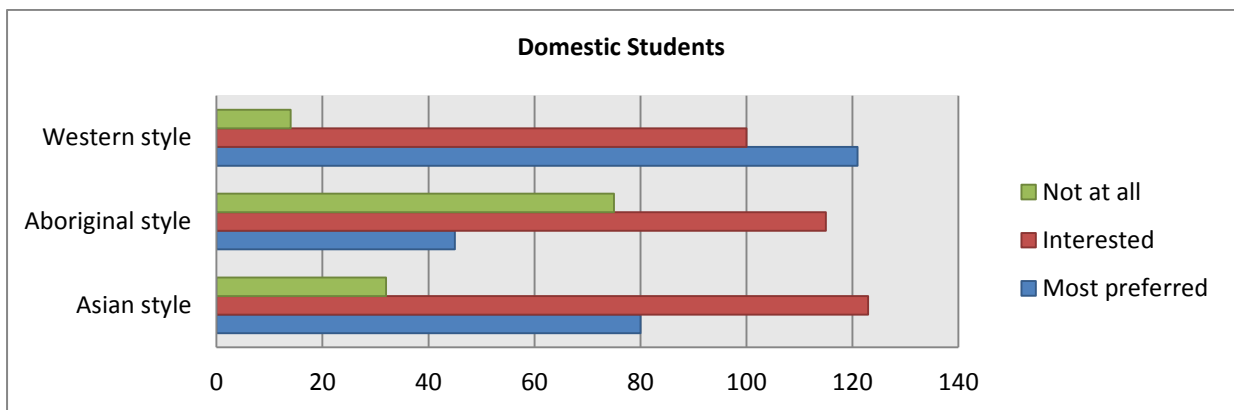
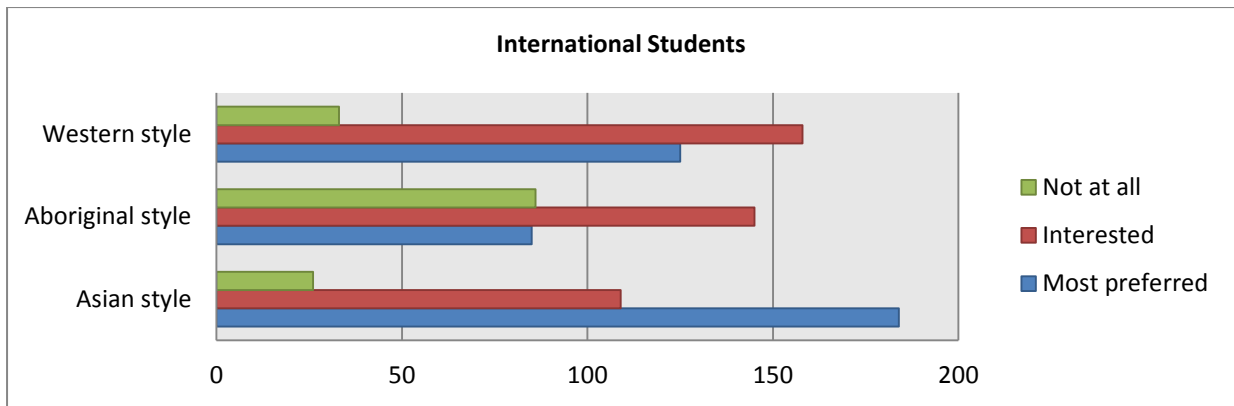
### Indoors vs outdoors

When attending an attraction most students would prefer to eat outside, with either a picnic style or covered outdoor area. Eating indoors rated the lowest preferred option and had the largest number of students “not at all” interested.



### Style of food

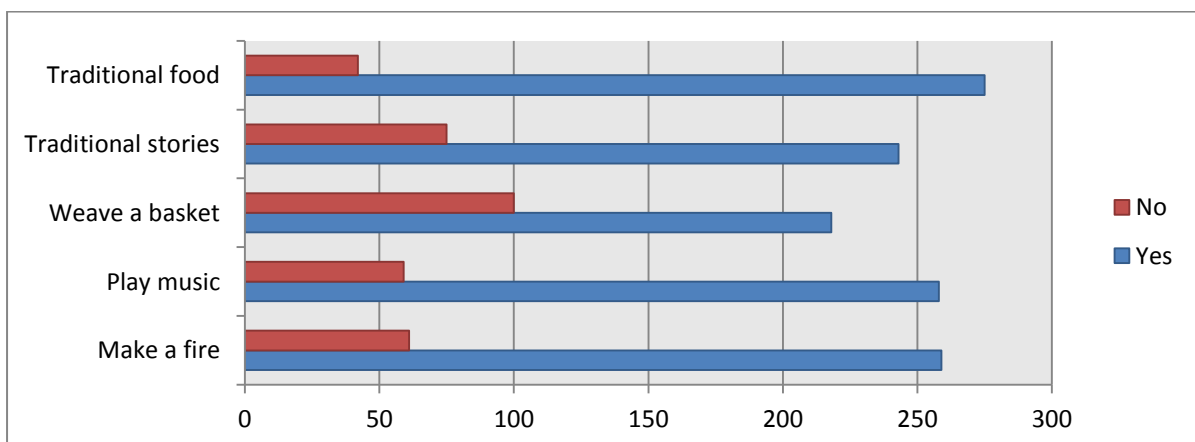
When choosing the style of food for lunch, the majority of International students preferred an Asian style, with the second most popular choice being Western and least preferring to eat Aboriginal style. Most domestic students preferred Western style food and secondly Asian style food, while there was a lot of interest in Aboriginal food there were also a lot of students “Not at all” interested.

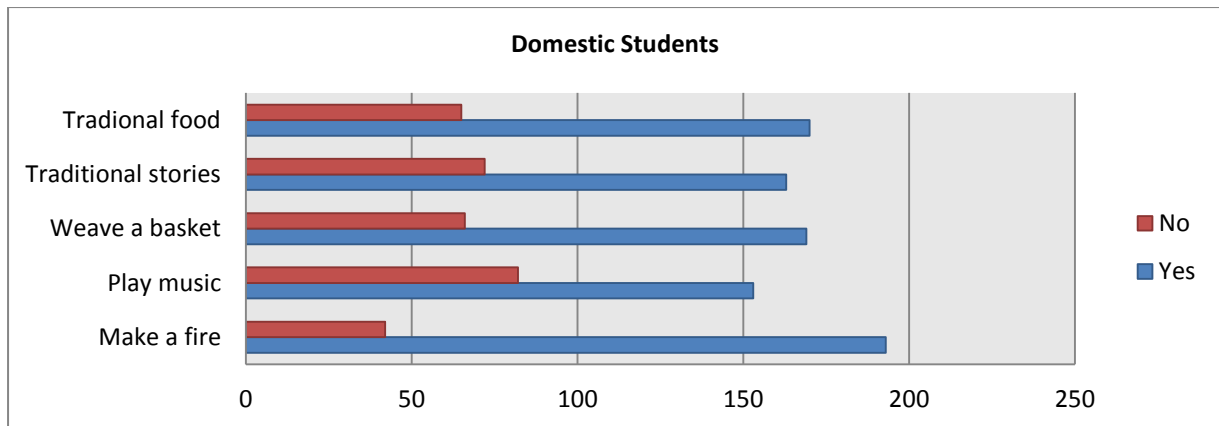


## 7.9 Activity preference

### Australian Aboriginal activities

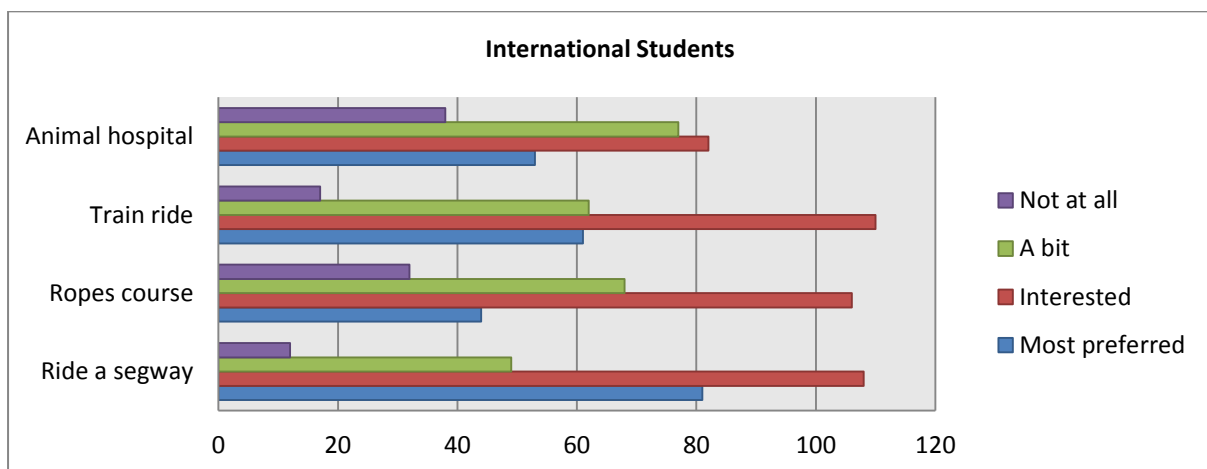
Students were asked what they would like to learn from an Australian Aboriginal Ranger during a visit to an attraction, most International students selected traditional food, with the least preferred option weaving a basket. Domestic students preferred to make fire, with all activities relatively similar except play music which scored lowest.

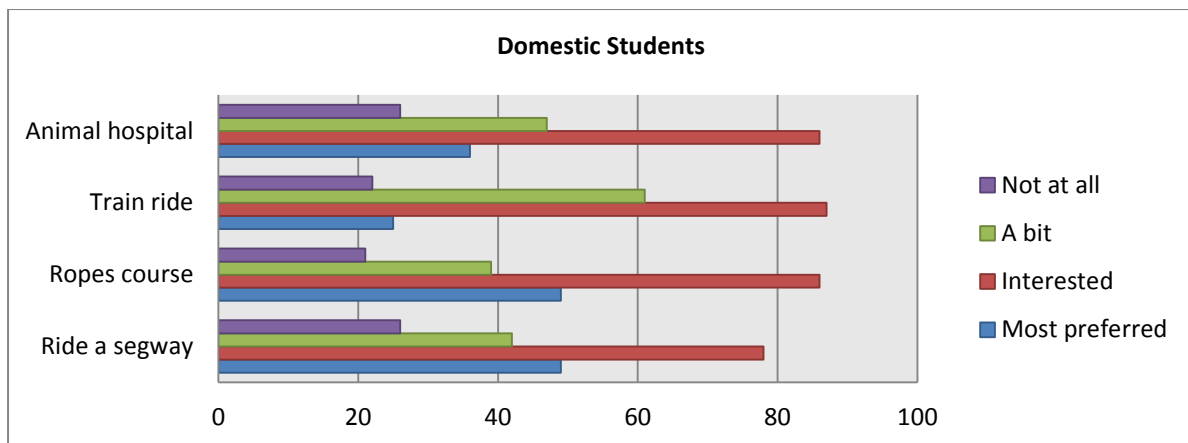




### Interest in other activities

Students were asked to rate their preference about doing other activities while at a wildlife sanctuary. The most preferred additional activity for international students was to ride a segway, with the train ride second most popular with the ropes course close behind. However, the animal hospital rated the lowest preferred activity. Domestic students preferred equally to ride a segway and ropes course, with the animal hospital coming in second and the train ride least preferred.





### 7.10 Preferred Dreamworld package

Respondents were asked to design their preferred package based on the following options

- Photo taken with a ranger or photo taken with native wildlife
- if a proportion of the photo price went to either help for native wildlife or for disadvantaged aboriginals
- photo was received either on the internet or in hard copy.

Both international and domestic respondents preferred the photo taken with a native guide, funds to go to disadvantaged aboriginals and to receive the photo on the internet.

## **8. Conclusion**

These results provide information for five tourism operators about the attractiveness of their product and suggestions as to how to changes can be made to match the domestic and international Chinese youth market's expectations. A number of activity packages were tested and the combination with the most utility identified. In addition, information about the technology usage characteristics, interest in Australian animals, and food preferences of young people were identified. These results and that of other studies conducted during this project will be discussed with the participating operators to enhance their product offerings.

This research demonstrates the usefulness of conjoint analysis for developing improved tourism activity packages. This is a new statistical technique that can identify the relative attraction of components of a tourism package.

Finally, the research findings indicate that adventure tourism operators or tourist attractions share common issues when dealing with specific market segments. This means that when researching a particular market for one adventure tourism operator, some findings will also be useful for all operators offering adventure tourism products.

## **9. Operator Outcomes**

### **9.1 Paradise Jet Boating**

Tony Johnson, owner of Paradise Jet Boating has successfully been working with attracting international students for a number of years and has noted an increase in Chinese and Indian students. However, with a growing number of tourism attractions on the Gold Coast, stagnating tourist numbers and new emerging international markets, Tony wanted to innovate his product to meet changing customer needs, as such, chose to participate in the Experience Gold Coast: innovative Product Development Project for International Student Travel.

Over the past year, Paradise Jet Boating have been trialling several innovations such combining the jet boating experience with other activities, such as, filming each jet boat trip for customers to purchase on USB and the addition of the Super Jeep, a custom built 9 seat stretched Jeep to the transfer guests to and from the terminal.

To assist Tony in understanding the emerging student market and how they view jet boating, the researchers initially conducted focus groups. Images were required to prompt the Chinese students as there were varying degrees of familiarity, but generally unaware of this type of boat. Issues expressed by the students in response to the description and imagery of jet boating were to do with safety and the fear of being in the open water and getting sun burnt. The students were encouraged to trial the jet boat experience and were interviewed afterwards. The overwhelming response to the experience was that it is “better than expected” and also “wetter than expected”. Other comments included aspects of improving safety.

Further investigation into student preferences for improvements found an overwhelming preference for transfers to be free. Chinese students are value orientated, looking to minimise costs, therefore the stretch jeep transfer although only \$5 was more popular amongst domestic students. International students preferred to bundle a day pass to a wildlife sanctuary with jet boating, while other more thrilling adventures such as jet skiing and parasailing rated last.

### **9.2 Get Wet Surf School**

Kerri Jekyll, Director and owner of Get Wet Surf School, noted that in recent years there has been a shift in the typical customers wanting to learn to surf. While in the past, the key market was backpackers travelling around Australia, whereas now the international student

market comprising about 500,000 students from China, India and South East Asia has become predominant. This change in focus from European backpackers to international students has meant challenges for her, with innovation needed to modify products to suit the new market.

Get Wet Surf School had unique challenges with the change to an Asian dominated market due to their concern about the safety of entering the water, especially the waves in the surf, and fear of drowning. While the proximity of the ocean was a key factor for students choosing to study at the Gold Coast, it was discovered during focus groups that they were content to look at the ocean rather than enter it, because many Asian students have never learnt to swim or have experience the surf. With the new Asian market being more fearful and less adventurous than the previous backpackers, Get Wet Surf School needed to reconsider their current strategy.

A group of international students were taken on a Get Wet Surf School lesson and later questioned. Students thought that the “lesson was better than expected” as they “didn’t expect to stand up” and this experience evoked had feeling of excitement, satisfaction and pride. While standing up on the surf board was an important aspect of the experience, also important was the ability to share images with friends via social media. Most students have a social media account which they use to share images with family and friends back home. This was particularly important for Chinese students, as their parents expect that their only child would experience Australia as a tourist and student.

Based on these findings, the Surf School changed it emphasis from thrill and adventure to customer safety with the focus on the surf skills and accreditation of their instructors. Sun sensitivity is also a characteristic of this market, as such, long sleeve rash vests available to avoid sun exposure. Another feature of the international student market is value for money. Understanding this aspect mean that Get Wet Surf School was able to offer group discounts, free transfers and bundling with other activities and accommodation to increase the perceived value.

### **9.3 Australian Kayaking Adventures**

Steven Vah, Owner of Australian Kayaking Adventures, wanted to diversify his products to appeal to a wider market, with tourist believing that the half day tour was physically demanding. Steve thought that a relaxing twilight tour through the Surfers Paradise canals which focused on sightseeing, rather than snorkelling would be more suitable to the growing international student market.



Investigation into the international student market supported the fact that Asian students had limited experience with kayaking and thought that the activity required physical endurance. Coupled with a fear of open water and sun sensitivity, Steven understood that there were many challenges to developing tours which Asian tourists felt more comfortable. Steven instigated the use of lifejackets and enhanced instruction for kayaking and snorkelling, and offering shorter sightseeing tours that began later in the day which focused on landmarks and wildlife. These innovations have proved successful, not only with international students, but Asians in overall.

As with most outdoor activities, poor weather conditions can cause frustration and customer dissatisfaction. Australian Kayaking Adventure wanted to understand the preference of customers who had experienced bad weather or had their tour cancelled. Steven was fascinated to learn that about half international students preferred a discount voucher and do the tour again, or to completing the tour and receive a partial refund. These insights into the new and growing emerging international student market have meant that Australian Kayaking Adventures can make modifications to attract and satisfy their customers.

#### **9.4 Currumbin Wildlife Sanctuary**

Keeping in line with other zoos and attractions, Currumbin Wildlife Sanctuary wanted to investigate the international student preference for a mobile device park app. Mobile phone app's for entertainment venues are commonly available. However, there is no research into the preference for international student tourists. In the first instance, focus groups were held with images of Currumbin Wildlife Sanctuary shown. In particular, students were not familiar with the concept of a wildlife sanctuary, they were only accustomed to zoos and theme parks that kept wildlife as attractions. The Sanctuary encompasses a wildlife hospital which rehabilitates animals.

The next step was to observe the students at the Sanctuary. The most important feature for the Asian students was getting a photo of a koala. A photo with this famous Australian is on the "must do" list, however, they are not keen on paying extra for this. Another observation was that the students were unable to navigate the show times and locations with the hard copy map provided. This meant that students were dissatisfied with missing shows due to being in the wrong place and not being able to locate animals of interest.

To assist Currumbin Wildlife Sanctuary in choosing a smart phone app the following considerations require attention. The app should assist patrons in navigating the Sanctuary to ensure that they follow the correct route and arrive at shows on time. Push notification can

be used to ensure current visitors are informed about 'one off' events, such as snake feeding which happens occasionally. Another feature that the app may include is English and Chinese translations of the wildlife interpretation shows allowing students to listen in English and peruse the Chinese version for fact and translation checking. Additionally, students were particularly interested in information about mothers and their babies. International students display a keen interest in Australian marsupial animals such as koalas and kangaroos. They were quite interested in how the young are born, what they eat and where they live.

## **9.5 Dreamworld**

In 2008, Al Mucci, General Manager of Corroboree, Tiger Island and Conservation Dreamworld, had thoughts about developing Dreamworld's new attraction Corroboree. Dreamworld wanted to make sure that the experience they built was unique and different to any other cultural exhibits within Australia and internationally. Al travelled extensively seeking out exhibits, trying to find the best way to display Aboriginal culture.

Initially, Al had a number of ideas for the attraction configuration, however, he wanted market testing to ensure they were on the right track and included activities that consumers wanted. Originally, the list of activities was quite large including making Aboriginal music, making fire, listening to dreamtime stories, throwing a spear, etc. To narrow down the list, focus groups were held with international students with results indicating their preference was mostly for physically passive but psychologically engaging experiences. For example, we discovered that trapping fish had a low level of interest in comparison to weapons demonstration. This information ensured that Dreamworld had confidence in tailoring the cultural activities within Corroboree.

Dreamworld Corroboree was opened in December 2013 and is now an interactive walk-through experience celebrating Aboriginal and Torres Strait Islander culture, wildlife and stories. It is a collection of wildlife attractions divided into subsections allowing guests to view native animals in their natural habitats. While it is a registered zoo with 800 native and barnyard animals, it differs to other animal attractions because Dreamworld Corroboree displays their animals through the eyes of the Aboriginal people instead of a zoological or biological method.

Since its opening, Dreamworld Corroboree has benefitted the local community. A number of indigenous personnel are employed to teach and demonstrate their culture to visitors. This ensures that the culture of the local mob is maintained and passed on to future generations, but also educating visitors to the attraction helping unification. The reconciliation action

program that Dreamworld has embarked is a long term initiative which is expanding its footprint of indigenous staff throughout the park and the murrayfication for all staff. From a commercial perspective, the attraction is helping to grow visitation to the park in the corporate, events and education segments.

## 10. References

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## 11. Appendix

### Appendix 1 Criteria for selection of participating business

<b>Mandatory</b>	Yes	No
Ability to contribute time and resources to the project		
Suitability of product for the Asian/International market		
Website available		
New product and/or package offering is innovative for Gold Coast		
Regular conducts marketing activities outside of Queensland		
<b>Other characteristics</b>		
Passion for business		
Already active in the international student market		
Export ready		
Asian language ability		