

MAY 2021

FAMILIES MARKET RESEARCH INSIGHTS

DESTINATION
GOLDCOAST.

📍 TALLEBUDGERA CREEK

AUSTRALIA'S FAVOURITE PLAYGROUND

PREFACE: IMPACT OF COVID-19 ON FAMILY TRAVEL

This insight report was originally released in September 2020 and was updated in May 2021 – with reference to this preface section. All other data is referenced accordingly.

The ongoing global pandemic fundamentally shifted the travel behaviour of Australian families during 2020 and will continue to do so throughout 2021.

The number of families travelling during 2020 fell by 1.8 million to only 3.3 million families taking an overnight trip (12 months to November 2020). This fall from 2019 levels of 5.1 million families partly reflected the extended periods of quarantine at different points throughout the year, but also a general reluctance to travel due to health concerns and uncertainty.

The Gold Coast is one of Australia's most popular holiday destinations and the decline in family travel accounted for more than half of the 1 million decrease in visitors, particularly interstate travelling families.

While family travel levels were much lower in 2020, family travellers were not the most severely impacted segment of the market and are therefore expected to recover quickly as interstate travel returns and levels of vaccination rise.

As a result, Destination Gold Coast considers the best indicator for what family travel may look like in FY22, as recovery progresses, is 2019 levels.

Forecasts by Tourism Research Australia expect that the domestic travel market will recover to 2019 levels by mid-2022, so while

COVID-19 continues to impact domestic travel over 2021, by 2022 the market should more closely resemble 2019 than 2020.

	2019	2020	Loss	% Loss
Australian Families Travelling	5.1	3.8	1.2	24%
Visited Gold Coast in 2019	1.3	0.6	0.6	50%

*"Traveller" defined as at least one overnight trip in the 12 months ending November each year.
Source: Gold Coast Australian Travel Survey (GCATS) 2019 and 2020: conducted in November each year from a nationally representative sample of travellers and sample of 3,000 or more.*

In the meantime, however, there are important considerations in adapting the Gold Coast's marketing in the current environment. These considerations for family travellers include:

- Consumer sentiment and uncertainty
- Not booking very far in advance of intended trips
- Seeking out discounts and special offers more than usual
- Health considerations and travel preferences
- Timely roll out of the national vaccination program.

MARKET OVERVIEW

The Gold Coast has been Australia's most popular family destination for more than a generation. Synonymous with travellers far and wide looking to tap into the fun and playful ambience of the region, tourism is at the heart of Gold Coast's economy. As such, its operators and businesses are inevitably the lifeblood of Australia's tourism capital.

Families from all over Australia are drawn to the Gold Coast for numerous reasons and arguably key experiences including pristine beaches, an abundance of family-friendly accommodation, the range of family-centric attractions from theme parks and amusement centres to leisure and sporting events. Family travellers have been the mainstay of the Gold Coast tourism industry for decades and will continue to be so after the COVID-19 pandemic passes.

As Australia's Favourite Playground, the Gold Coast has been a leader in marketing to families for more than 60 years, as promotional techniques and global travel conditions have evolved.

Moving forward, the Gold Coast will need to redouble efforts to reinforce its positioning and offering for Australian and overseas families including the convenience, comfort and fun of Gold Coast family holidays through its marketing.

A major aspect of Destination Gold Coast's marketing activity addresses the changing dynamic of families and reflects the fact that in modern Australia, families are characterised by increasing diversity. Our strategy encompasses both the nostalgia of creating lifelong memories through unforgettable family holidays with mum, dad, siblings, stepparents, grandparents and great-grandparents through the depiction of multi-generational imagery and campaign content.



WHO ARE FAMILY TRAVELLERS?

Family travellers are defined by two main categories – those with children under the age of five, known as 'Young Families', and those with no children aged under five, known as 'Older Families'.

There are over 1.3 million Young Family travellers in Australia and 3.8 million Older Family travellers. Of these, around 380,000 Young Family and 825,000 Older Family travellers visited the Gold Coast in 2019, spending an average of \$2,270 per trip (compared to \$1,870 from an average Gold Coast traveller). Older Family travellers are also significantly more likely to be 'High Spending Travellers' (those who spent more than \$5,000 on travel in the last 12 months) than travellers in general, with 45% Older Family travellers considered HSTs in 2019 (compared to 36% of travellers in general).²



AUSTRALIAN TRAVELLERS'
WITH CHILDREN UNDER THE
AGE OF 18 LIVING AT HOME



49%

OF ALL AUSTRALIAN TRAVELLERS
(5.1 MILLION TRAVELLERS)



\$6,730

AVERAGE SPEND ON
TRAVEL IN LAST 12 MONTHS



\$114,000

AVERAGE HOUSEHOLD
INCOME DURING 2019

¹ "Travellers" are defined as adults (aged 18+) who have taken an overnight trip within the last 12 months.

² Source: Destination Gold Coast, Gold Coast Australian Travel Survey (GCATS) (unpublished), November 2019; Sample size n=3,000, Base: Australian Travellers (18+).



FISHERMEN'S CO-OPERATIVE, MAIN BEACH

FAMILY TRAVELLERS SEGMENT PROFILE

Family travellers, unsurprisingly, are more likely than other travel segments to seek holiday experiences that allow them to spend time with their children, particularly for Young Families. However, Family travellers are also significantly more likely to seek experiences including joy or happiness, safety and security and excitement in general from their holiday experiences. Older Families also look to experience well-being, and thrills and adventure on their holidays.

Families also seek a wide range of accommodation options when travelling. While luxury hotels and resorts are their favourite type of accommodation by far, families also use shared accommodation like Airbnb and rented houses for holiday accommodation.

FAMILY TRAVELLERS TO THE GOLD COAST³

	YOUNG FAMILIES	OLDER FAMILIES	FAMILY TRAVELLERS
Adult Travellers	1.3 MILLION	3.8 MILLION	5.1 MILLION
Visited Gold Coast in 2019	380,000	825,000	1.2 MILLION

³Source: Destination Gold Coast, Gold Coast Australian Travel Survey (GCATS) (unpublished), November 2019; Sample size n=3,000, Base: Australian Travellers (18+).

TOP 3 MOST PREFERRED FORMS OF ACCOMMODATION⁴

Families' most desired forms of accommodation are luxury hotels or resorts, homestay accommodation and rented houses or apartments.

1



LUXURY HOTEL OR RESORT

2



AIRBNB, HOMESTAY OR SIMILAR ACCOMMODATION

3



RENTED HOUSE OR APARTMENT (NOT SERVICED)

Note: "Favourite" only includes accommodation types that respondents ranked among their three most preferred, and that are also significantly associated with the Family segment.

⁴Source: Destination Gold Coast, Gold Coast Australian Travel Survey (GCATS) (unpublished), November 2019; Base: Australian Travellers (18+), Sample: n=1,041.

TOP 5 RANKED 'FAVOURITE' ACTIVITIES⁵

Overall, Families' favourite activities that they "most love" to engage in while on holidays include going to the beach (49%), relaxing by a pool at a hotel or resort (45%), visiting wildlife attractions (39%), visiting theme parks or amusement parks (36%) and having BBQs or picnics (29%).

1



GOING TO THE BEACH

2



RELAXING BY THE POOL,
OR AT HOTEL OR RESORT

3



VISITING WILDLIFE ATTRACTIONS
(ZOOS, SANCTUARIES & PARKS)

4



THEME PARKS OR
AMUSEMENT PARKS

5



PICNICS OR BBQs

Note: "Favourite" includes activities that respondents "most love" to do on holiday, and that are also significantly associated with the Family segment.

⁵Source: Destination Gold Coast, Gold Coast Australian Travel Survey (GCATS)(unpublished), November 2019; Base: Australian Travellers (18+), Sample: n=1,041.



TOP 5 RANKED 'MOST IMPORTANT' ACTIVITIES WHEN CHOOSING THE GOLD COAST⁶

For Families that choose to visit the Gold Coast, the two activities most important to their decision-making to opt for the destination were, not surprisingly, going to the beach (46%) and relaxing by the pool at a hotel or resort (37%). Visiting theme parks⁷ is also important (24%), but the opportunity to explore the destination by walking around (28%) and seeking a coffee or a light meal at a café (24%) are also strengths associated with the Gold Coast.



GOING TO THE BEACH



**RELAXING BY THE
POOL, OR AT HOTEL
OR RESORT**



**WALKING AROUND
TO EXPLORE**



**THEME PARKS OR
AMUSEMENT PARKS**



**COFFEE OR A LIGHT
MEAL AT A CAFÉ**

⁶**Source:** Destination Gold Coast, Gold Coast Australian Travel Survey (GCATS) (unpublished), November 2019; Base: Australian Travellers (18+), Sample: n=218.