

Request for Quote

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| RFQ Title | Gold Coast Australian Travel Survey (GCATS) 2021 |
| Service Category | Market Research Survey |
| Purchaser Name | Nigel Smith |
| Corporate Entity | Gold Coast Tourism Corporation Ltd. (trading as Destination Gold Coast) |
| Business Unit | Corporate Services |
| Contact Number | +61 (07) 5584 6249 |
| Contact Email | nigel.smith@destinationgoldcoast.com |
| Closing Date | 12pm Monday, 27 th September, 2021 (Australian Eastern Standard Time) |

The Gold Coast is Australia's largest regional city, and one of its largest leisure destinations, for both domestic and international visitors. In 2019, Gold Coast attracted 1 million international visitors, 4.2 million domestic overnight visitors and 8.9 million daytrip visitors, with collective regional expenditure of more than AUD\$5.9 billion. Since the onset of COVID-19 the destination has suffered disproportionately compared to other Australian destinations due to its historical success with attracting interstate and international visitors. In 2022 to the destination needs to be prepared to take advantage of every opportunity to recover that becomes available, armed with the most detailed and current understanding of its current place in the Australian leisure travel market.

1. Introduction

Gold Coast Tourism (trading as Destination Gold Coast (DGC)) has, for the past four years, conducted an annual brand tracking survey: the Gold Coast Australian Travel Survey (GCATS). This survey has been critical to both setting for the foundation for DGC's marketing strategy, and for providing unique insights into the Australian travel market. As a study focused exclusively on the domestic overnight travel market within Australia, GCATS has provided critical information about the drivers of destination selection in this market, and the impact COVID-19 has had on both travellers and potential travellers within Australia.

In November 2021 DGC wishes to continue to continue this brand tracking survey into its fifth wave, with minor adaptations to better incorporate current understanding of the impact of COVID-19 on domestic tourism during 2021.

2. Background

The first GCATS was conducted in 2017, establishing a baseline for traveller numbers and characteristics for the Australian market of the previous 12 months, and was followed in 2018 by a second wave, able to demonstrate the impact of the 2018 Gold Coast Commonwealth Games on perceptions of and visitation to the Gold Coast. In 2019, on the back of a successful year of post-

Games campaigns (informed by findings from earlier GCATS surveys), GCATS was able to measure the impact of our marketing on key target markets, providing key insights not available in official measures of market share, such as the National Visitor Survey.

The fourth wave of this survey, in 2020, tracked the decline of the national domestic overnight travel market due to the global pandemic, and the impact this had on perceptions of the Gold Coast.

In 2021, following on from the hardest year for the tourism industry in the modern history of the Gold Coast, GCATS will provide an opportunity to assess the overall position of the Gold Coast brand, in the absence of sustained national marketing campaigns that had been conducted in 2019 and into early 2020. It will also provide key insights into what the most lucrative opportunities will be for the Gold Coast in 2021, to facilitate the rapid recovery of the industry.

3. Purpose

The nature and composition of the GCATS survey are now well established: this RFQ looks to secure a provider who can maintain our existing survey with minimal risk of errors and support for critical new features, such as appending bespoke segments to the raw data set.

The following description of the survey is to provide an idea of the scale and complexity of this project – DGC does not wish to alter the survey substantially or replace it with new measures, only to retain consistency with our existing series and update certain parts of the survey relevant to conditions in 2021.

The survey seeks to capture a nationally representative sample of domestic overnight travellers, tracking established questionnaire definitions, with a sample of n=3,000. The survey averages 20 minutes in length, and to includes the following elements:

1. Section A: Screener based on age, sex, postcode and whether had an overnight trip in the last 12 months.
2. Section B: General travel behaviour characteristics, including: experiences sought, holiday activities preferred (and ranked), accommodation preferences and attitudes to travel.
3. Section C in two parts:
 - General questions including unaided destinations intend to visit in next two years (domestic and international), destinations visited in the last 12 months, number of times visited each destination and reasons for visiting each, and frequency of visiting the destination (including first time visitors),
 - Loop Per Leisure (VFR/Holiday) Destination for most recent visit (Loop up to two different destinations per respondent). Destination are selected for loop based on sample needed for each destination. The loops include a range of information including party type, length of stay, spend, experiences sought and activities key to selection of the destination.
4. Section D: Satisfaction with destinations visited (all VFR/holiday destinations, not restricted to loop responses), recommendation rating for each destination, intention to visit specific

destinations (aided), planning stage for intended trips, total value of overnight trips (including overseas) in the last 12 months (i.e. total travel wallet).

5. Section E: Destination perceptions (open-ended associations, verbatim likes and dislikes) for selected list of destinations.
6. Section F: Gold Coast-specific questions (all respondents)
7. Section H: Campaign Awareness [may not be relevant in 2021]
8. Section P: Pandemic Travel
9. Section G: Demographics and media consumption, including household structure, dependent children, household income, household income type, media channels consumed (hours per week) and languages spoken in home.

NB: PANDEMIC SAMPLE

Between 2017 and 2019 sample for this survey was exclusively people who had taken an overnight trip in the previous 12 months (as of November each year). However, in 2020 this sample was recognised to be insufficient given the travel conditions during that year, so those who had not travelled in 2020 but who had spent more than \$1,000 on travel in 2019 were included in the sample. As a result, 2020 sample consisted of 2,393 Travellers, and 607 non-travellers; DGC expects a similar split to apply in 2021, although this is dependent on the incidence of domestic overnight travel over the previous 12 months.

The definition of “non-Travellers” will also change in 2021: DGC is open to suggestions for how best to sample this, but expect a screening question along the lines of “How likely would you have been to have taken an overnight trip in the last 12 months if there had not been a pandemic?” for non-travellers, with the sample to include those who would be some degree of “likely” to have travelled in 2021.

4. Project components and milestones, key dates

Key milestones for this study:

- Project kick-off – first week of October, 2021
- Questionnaire design approval by mid-October (few changes from 2020 survey)
- Final programmed survey approval by late-October
- Extensive testing and piloting to ensure programmed questionnaire functions as intended by early-November (particularly focusing on ranking questions and loops)
- Fieldwork – first two weeks of November 2021
- Topline report – one week after close of Field (weighted data tabs & banners, no analysis)
- Final report by **end of December 2021.**
- Presentation/workshop to be delivered mid-January, 2022.
- Final weighted data sets (SPSS files with Q format databases, see “Deliverables” below) delivered first two weeks of January, 2022.

5. Requirements and Deliverables

a. Requirements - Fieldwork

Specific requirements for the fieldwork component of this study:

- Results of the survey must be representative of Australian adult population (aged 18+), and of the sub-set of Australian adults who have taken at least one overnight trip within the previous 12 months; ABS¹ matching general population estimates to be achieved using screener data on age, gender and place of residence.
- While more than two-thirds of this sample is expected to be travellers, some additional proportion of “non-travellers” or “potential travellers” will also be allowed for, given pandemic conditions (see above “Pandemic Sample” note).
- Minimum total sample size for this project is 3,000 completed surveys; known incidence figures relevant to these sampling requirements are:
 - Incidence of overnight travellers is expected to be between 50% and 60% of adult population in 2021 (68% in 2019, 46% in 2020).
 - Within the qualified group of respondents, given proportions of sample visiting certain destinations, and with particular places of residence (expected sample proportions available on request) – this condition subject to the overall incidence of domestic travel during 2021.
 - There may be a need to boost Queensland resident quotas to have sufficient sample for key destinations (although this may not be required, given levels of travel activity nationally).

b. Requirements – Analytical & Reporting

Specific requirements for the analytical and reporting component of this study:

- Weighting to the population of Australian adults from ABS sources, including a weight set specifying the number of travellers (i.e. not just proportion of population, but population estimates).
- Applying bespoke segmentation to final data before reporting (using tool designed to tag segments in Excel format).
- Two reports:
 - Industry Overview: Broad industry metrics captured in this study, including analysis by Segments (including bespoke segments)
 - Destination Performance Report: Profiling major destinations (list available on request), their brand metrics and relative performance.
- Databases in the form of a Q-formatted project (with accompanying SPSS file), see “Deliverables” below.

¹ Australian Bureau of Statistics series “[3101.0 - Australian Demographic Statistics](#)”

c. Deliverables

The following deliverables are required for each year of the project:

- Draft and final questionnaires (minimal revisions expected in 2021 wave)
- Testable versions of final programmed questionnaire
- Sample quotas/targets and final total sample required
- Regular updates on field performance during fieldwork phase
- Topline Excel report within one week of close of field: weighted data tabs & banners, no analysis required – used to identify issues with data and note trends for reporting.
- Population-estimated (in thousands) weighting set for final data (calculated from screened + qualified population)
- Code frames and manual coding for six open-ended questions
- Final reports and slide decks
- Presentation of final report
- Three weighted databases in Q project format with SPSS data file, as follows:
 - o 2021 Traveller database, all questions and data (no stacking)
 - o 2021 Destination database, stacked responses for all destination-level questions (and related variables)
 - o 2021 time series database (incorporating key variables from 2017 through to 2020), each time period weighted with population estimates. To include only key tracking metrics (e.g. destination visitors, intentions, preferences, satisfaction, recommendation levels, demographics and media usage data)

The final reports should include:

- Profile of Gold Coast visitation in last 12 months vs. key competitors (including visitor numbers, average number of visits, travel party size, and other key travel/demographic characteristics), including Segments
- Profile of Gold Coast intending visitors in next 12 months vs. key competitors
- Profiles of the Segments at a national level (tracking overall characteristics)
- Profile of Gold Coast visitors' satisfaction with, and recommendation of, the Gold Coast. This should include comparisons to key competitors and national, state and Segment benchmarks.
- Media usage profiles of each Segment, and by destinations visited/intend to visit
- Results from all other types of information collected by Segment and Destination visited/intend to visit
- Where possible (given questionnaire and reliability constraints) for any of the above characteristics, year-on-year movements in key metrics (i.e. comparing results to previous wave of survey – and 2019 for pre-COVID-19 conditions).

6. Budget

The proposed total budget for this project is AUD\$45,000 (exc. GST).

7. Intellectual Property

Destination Gold Coast will retain all intellectual property rights relevant to this project.

8. Selection Criteria

The selection criteria for this project are:

- Demonstrated expertise in travel and tourism market research
- Demonstrated expertise in tracking surveys and year-on-year analysis
- Demonstrated ability to manage transition of trackers between providers without significant disruption to time series and data continuity
- Credentials of proposed team to perform research
- Demonstrated capability to execute national-scale surveys
- Recommended approach to weighting, data analysis and final report
- Overall fit to GCT's core objectives of proposed approach relative to investment required

9. RFQ Timelines

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| <i>Requests for additional information from prospective providers (questions to be submitted by email):</i> | <i>COB Monday, 20th September, 2021</i> |
| <i>Information for prospective providers (anonymised questions answered and shared with all prospective providers):</i> | <i>COB Tuesday, 21st September, 2021</i> |
| <i>Closing date for submissions:</i> | <i>4pm Monday, 27th September, 2021</i> |
| <i>All applicants to be advised of outcome by:</i> | <i>COB Friday, 1st October, 2021</i> |
| <i>Project commencement by no later than:</i> | <i>Wednesday, 6th October, 2021</i> |

Supplier Proposal to provide the following information:

NB: This is not a form, but a guide to key information that should be provided (apart from criteria above).

1. Organisational details

Formal Name:

Trading Name:

Address:

ABN:

2. Contact details

Name:

Position:

Phone Number:

Email:

3. **Personnel and experience:** *The names of any personnel who would be assigned to the project, and briefly their roles and responsibilities, qualifications, and other professional experience relevant to the conduct of this study.*
4. **Services.** *A description of the Services to be provided.*
5. **Service Levels:** *A description of the Service levels to be met by the Service Provider in delivering the Services.*
6. **Pricing:** *Please indicate your proposed competitive pricing for this project, detailing project fees, incentives budget, estimated hours and other expenses etc. Pricing must be inclusive of GST.*
7. **Conflicts of Interest:** *Declaration of any conflict of interest and how any conflict of interest may be managed.*
8. **Insurance Details:** *Please detail your insurance requirements including policy number, insurer, sum insured and expiry.*
9. **Other:** *Any other relevant information.*