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Medium Term Deliverables: Proposed Operational Investment

New Show Content – Night Time Events Program and Cultural Program

Longer Term Deliverables: Proposed Development

1. Open up Decommissioned part of the Site as a Heritage-Based Asset
2. New Aviary
3. New Walking Trail(s)
4 New Glamping Site

Appendix 1

Master Plan: Summary Analysis of Investment Development Options

STAGED MASTER PLAN IMPLEMENTATION

8. Staged Implementation of the Master Plan

6. Curric

5. Via Ferrata

4. New Insect House

3. New Butterfly House

2. New Aviary

1. Staging and Cultural Program

Appendix 1

Master Plan: Summary Analysis of Investment Development Options

9. Master Planning Context

8. Proposed First Step Deliverables: Proposed Development

7. Staff Skills and Resources

6. Marketing Investment & Relaunch

5. Reinvigorate Volunteers

4. New Show Content

3. New Show Content - Free-Flight Bird Shows and Back of House Tours

2. New Show Content

1. Establish New Wildlife Show Theatre (Amphitheatre) at the Centre of the Site

Appendix 1

Master Plan: Summary Analysis of Investment Development Options

8. Motorway Signposting

7. New Show Content

6. New Insect House

5. New Butterfly House

4. New Show Content

3. New Show Content - Free-Flight Bird Shows and Back of House Tours

2. New Show Content

1. Establish New Wildlife Show Theatre (Amphitheatre) at the Centre of the Site
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EXECUTIVE SUMMARY

The David Fleay Wildlife Park (DFWP) is a valuable and long-established visitor attraction and community facility which has been enjoyed by international, interstate and intrastate visitors over the years, but as is the case for all visitor facilities, it is subject to an increasingly competitive marketplace and must continue to plan strategically, innovate and invest in order to flourish.

The master planning process being led by the Department of National Parks, Recreation, Sports and Racing (NPRSR) is a key opportunity to refocus the Park, providing it with a clear and agreed vision that will guide it to a sustainable future where its assets contribute fully to both the visitor economy and local community.

The DFWP Master Plan project is a priority of the Queensland Government in delivering its commitment to improve access to national parks for sustainable ecotourism and outdoor recreation, and support growth of Queensland’s tourism industry. DFWP is considered to have significant potential as a gateway visitor centre, which showcases the State’s national parks and nature-based assets, and the Queensland Government’s conservation work and priorities.

This draft concept master plan for DFWP has been developed in close consultation with NPRSR and key stakeholders, and will be further informed via feedback from public consultation, in order to develop a shared vision for the Park’s future.

The Master Plan has been prepared in four key stages;

1. A competitor and market analysis, including Gold Coast tourism parks and environmental education centres;

2. An assessment of the viability of the current activities and commercial offering available at DFWP;

3. An investigation of development constraints; and

4. Development of a new master planned vision for DFWP.

Specifically, the Master Planned Vision incorporates;

• Benchmarking of the site Park against similar functioning facilities;

• Consideration of the commercial potential of DFWP’s facilities and product offers;

• Recommendations on future DFWP positioning, and development

• Analysis and assessment of proposed business models; and

• Consultation with key stakeholders to identify priorities; resulting in

• Preparation of a Master Plan Vision for DFWP which includes a clear analysis of preferred business and operating models, a shared future vision and recommendations on a staged implementation approach.
As part of the review process in preparing the draft master plan and vision, a range of options for the Park’s future were established and tested as a means of determining a preferred concept and a way forward. It is recognised that DFWP is facing number of pressing challenges at present, having gone through several changes of focus during its lifetime, with resulting infrastructure, marketing and investment challenges now apparent. Preparation of the Draft Master Plan has been conducted at a critical time for the Park - costs are rising while visitor number and revenues have been decreasing. The Park’s overall infrastructure requires urgent attention, and awareness and profile of the Park has fallen to low levels.

On current estimates, the Park attracts 17,000 visitors, but from an outcome perspective, there are a number of key opportunities available to achieve a better return on investment for government. A key issue emerging from review of the Park’s operation is the need for a clear vision and focus for the Park’s operation, with clear, measurable and achievable (albeit stretch) targets.

Tangible opportunities present themselves in the form of:

• State Government commitment to DFWP as a gateway park and as flag-bearer for the emerging ‘NP’ brand;
• Fully developing links with Tallebudgera Active Recreation Centre and Beach School and meeting the needs of the local schools market as a whole;
• Good strategic location in terms of motorway access;
• Potential linkages with Gold Coast based universities and research institutes;
• The exciting focus provided by Gold Coast’s hosting of the Commonwealth Games;
• Positive market trends for nature-based visitor attractions and leisure tourism growth;
• A partnership approach to growing visitor numbers and revenues, and controlling costs;
• Delivering edu-tainment focus, linking to conservation but delivered with an entertainment focus can provide an edge; and
• Marketing re-launch - a sustained marketing presence has a key role to play in a turnaround for the Park.

NEW VISION

Based on analysis of the market, site constraints and review of current Park operations, the master planning process has identified that DFWP requires a new and focused Vision which provides a clear direction for investment, management and delivery.

This Master Plan report outlines a proposed vision for the Park, based on making a virtue out of what DFWP is all about, and strengthening its links with National Parks by developing it as a ‘gateway’ centre to wildlife in National Parks and other conservation activities.

It is envisaged that DFWP will provide visitors with unique, interactive edu-tainment experiences where they have fun and learn about our native wildlife. It becomes a showcase for QPWS conservation activities across the State through hands-on learning experiences which:

• Are affordable and entertaining for families, where they can also learn;
• Promotes our natural heritage and environment;
• Delivers a gateway function for QPWS, growing awareness of the Service’s State-wide parks and wildlife assets;
• Educates our youth with structured programs;
• Becomes a hub and supports our local community; and
• Delivers good value and returns on Government’s investment.

By doing so; DFWP will be an exemplar of a modern wildlife centre within the context of National Parks, applying leading practice methods in native animal conservation, and explaining why it is best to take this approach, while providing visitors customers with an up close and personal, and entertaining experiences.
For DFWP, the stars of the show are the animals. Initial research suggests strength in the following areas which offer potential for development as hero experiences which differentiate the Park from a marketing perspective;

- Establishing a new free flight bird show featuring Wedge-tailed eagles can add a new hero
- DFWP is already synonymous with the platypus
- Establishing a butterfly house which features the Richmond Birdwing butterfly, and providing a new focal experience
- The special service and skills of Ranger-led edu-tainment.

Alongside identified market demand and the Park’s growth potential, as a site it is recognised that a number of key factors will shape the master planned vision and objectives;

- The site has a natural capacity in the region of 50-60,000 visitors per annum – key constraints include the overall size of the site and facilities such as car parking provision;
- The character of the site, the product on offer and where stakeholders felt that its strengths and opportunities rested, were based on quiet enjoyment, conservation, natural habitats and authentic surroundings;
- Overall the site is not conducive to large scale built development - theme-park style hard rides would not fit with the visitor market or surroundings;
- Engagement with local communities and delivering an educational experience are central to the Park’s remit;
- As a Government managed and funded destination, the Park should not directly provide services which would normally be best provided by the private sector; and
- While the Park has the potential to be managed in a more business-like and commercial manner to maximise revenue generating potential, the nature of the site and the type of product provided means that it is an unrealistic expectation for the business to have the potential to reach a financial break-even position, in the short to medium terms.

**TARGET MARKETS**

In developing the recommended vision and objectives, a number of target markets have been identified as critical - school and education groups, families with young children, local Gold Coast residents with visiting friends and relatives, domestic markets (interstate and intrastate), including day tour companies, bus companies, inbound operators), and domestic specific interest groups.

**IMPLEMENTATION**

A staging roadmap and recommendations have been developed which outline the key steps required to address the identified key challenges and realise the vision set out in this report.

**FIRST STEPS**

A number of proposed actions have been identified as able to be delivered within existing available budget. The master plan has identified these in concept only and delivery within existing budget is subject to detailed design and costing. These actions have been identified as being critical to re-establish the Park and enable it to compete in the marketplace. Proposed development focuses on providing on-site facilities necessary to facilitate greater levels of interactive experiences, and practical steps to grow visitor numbers and revenue streams.

The activities and proposed development prioritised at this stage reflect the weaknesses identified in the current product and the opportunities for development in relation to target markets. The proposed new amphitheatre and pontoon/ canoe jetty are key facilities – in the case of the former, providing a much needed dedicated show space, and in the later, providing a physical link which facilitates a partnership between the Park and Tallebudgera Active Recreation Centre and Beach School.

Proposed first step deliverables to increase visitation and create new and diverse recreation activities include:

- New amphitheatre/ show area
- New pontoon/ canoe jetty
- Relocated koala enclosure
- Refreshed interpretation and signing (site-wide)
- Removal of fencing to open up Moon Dam and its wetlands habitat
- Kangaroo Encounters Study Trail
- Remodelled café/ retail area in the Visitor Centre
- Motorway signposting
- Site Refresh and Refurbishment.
- Creation of a program of curriculum-based education packages
- Development of a new free-flight bird show.

Supported by;

- A marketing relaunch and dedicated marketing program
- A review of staff skills and resources against the requirements of the new vision and objectives
- Governance arrangements which respond to the Park’s new vision and objectives.

LONGER TERM VISION

The plan contains recommendations for programs of medium and longer term deliverables to deliver the overall vision for the Park. These deliverables focus on expanding the range of experiences which the Park can provide to target visitor markets. Some proposals are also relatively quick wins which are deliverable with modest investment, while other proposed developments are more ambitious. Key proposed developments include a new butterfly house and interactive playscape as well as developing and refreshing a range of wildlife exhibits to build the level of interactive activities and exhibits on site. In the longer term, subject to full testing and cost/benefit analysis, opportunities such as establishing a glamping site, development of a new aviary and revitalising and opening up the currently decommissioned parts of the site (Fleays House, Platypussary) provide further opportunities to expand the range of experiences on offer.

A key element of the longer term vision is also developing a broader range of active pursuits on site which complement the core product and Park experiences – the Plan sets out a number of recommendations in this regard.

In terms of deliverability, partnership is central to the Park’s future. Once the Park is re-established in the marketplace, a number of the proposed developments have been identified as having the potential to attract commercial partners and generate new revenue streams.

The overall concept is that successful implementation of first steps is necessary to re-establish the Park with core facilities and programs, and the medium and longer term deliverables will continue to broaden the range of experiences on offer to grow visitor numbers, visitor satisfaction levels and engagement with local communities. Continued investment and commitment is necessary in the medium term, as without it, the Park’s visitor experience will start to stagnate once again. Innovatory delivery and appropriate investment need to be sustained.
Section 1

STRATEGIC CONTEXT

- Project Background
- Guiding Principles
- Ecotourism Priorities
- Gold Coast Priorities
- The Vision for Tourism in Queensland
PROJECT BACKGROUND

David Fleay Wildlife Park is a valuable and long-established visitor attraction and community facility on the Gold Coast which has been enjoyed by international, interstate and intrastate visitors over the years. However, as is the case for all visitor facilities, it is subject to an increasingly competitive marketplace and must continue to plan strategically, innovate and invest in order to flourish.

On behalf of the Queensland Government, the Department of National Parks, Recreation, Sport and Racing (NPRSR) is leading the preparation of a Master Plan for the future redevelopment of this iconic ‘Gateway’ visitor centre through:

1. A competitor analysis of current Gold Coast tourism parks and environmental education centres - including the requirement to understand competitor investment plans/scale of investment
2. An assessment of the viability of the current activities and commercial offering available at DFWP
3. An investigation of development constraints; and
4. Development of a new master planned vision for DFWP.

The aim of the project is to establish a Master Plan Vision for the David Fleay Wildlife Park that will guide it into a sustainable future where its assets contribute fully to both the visitor economy and local communities.

GUIDING PRINCIPLES

The following Guiding Principles have been agreed by the Steering Committee and Reference Group to guide the development of the Master Plan:

- A clear unique selling point (USP) that highlights the unique assets of DFWP and promotes visitation growth and increased length of stay through “must-see” experiences
- A sustainable business model that contains feasible and viable product that can be refreshed and rejuvenated and not stagnate
- A master planned vision, incorporating staged and costed implementation
- An approach based on partnership delivery
- Delivers the potential of DFWP as a gateway park
- Is affordable and entertaining for families, where they can also learn
- Promotes our natural heritage and environment with a clear conservation focus
- Educates our youth with structured programs
- Becomes a hub and supports the local community
- Delivers effective return on investment Government’s investment.

Figure 1 Project Methodology
It is the quality of Queensland’s unique natural environment with its rich biodiversity and wildlife that is the foundation of the state’s tourism competitive advantage. Visitors’ experiences are enriched by the outstanding natural and cultural values they encounter.

Through best practice ecotourism, Queensland can deliver world-class experiences that retain the inherent natural values upon which the tourism industry depends.

ECOTOURISM PLAN PRIORITIES

World-class nature is the main motivator for international and domestic visitors to travel to Queensland. Ecotourism is no longer a niche market – it is one of Queensland’s greatest competitive advantages.

Recognising this, the Queensland Government has developed the Queensland Ecotourism Plan 2013-2020, which seeks to provide tourism operators, government, community and other stakeholders with clear direction on how Queensland will leverage its competitive advantage to become a bold, innovative, world leader in ecotourism.

The vision for ecotourism in Queensland by 2020 is:

Queensland is Australia’s number one ecotourism destination and recognised as a world leader in ecotourism, delivering best practice nature-based experiences that contribute to the conservation of our natural resources and cultural heritage.

The vision will be achieved through the implementation of the following strategic priorities:

1. Delivering world-class experiences
2. Facilitating best practice and innovation
3. Raising the profile of Queensland’s ecotourism experiences
4. Fostering thriving operators
5. Embracing a partnership approach between the tourism industry, government, community and Traditional Owners.

The aim of the Plan is to increase visitation, visitor expenditure and regional dispersal across Queensland’s terrestrial and marine natural areas, particularly in those protected areas managed by the Queensland Parks and Wildlife Service.

The Plan will focus on facilitating best practice, innovative ecotourism experiences that are sustainable and appropriate for the landscape setting.

Existing ecotourism experiences will be fostered and reinvigorated to appeal to ecotourism’s traditional markets, including the domestic market, and emerging growth markets such as China and India.

Development of new, innovative ecotourism products will also be essential to satisfy these changing visitor expectations. Delivering value for money experiences that compete on quality, and not on price, is vital for a relatively high cost destination like Australia.

GOLD COAST PRIORITIES

DESTINATION

To the holiday maker, the famous Gold Coast experience represents Australia at its best. The collective voice of more than 11 million visitors each year is a clear indication of the region’s ability to continually offer up new and innovative things to see and do all year long.

Its strength lies in the natural and manmade diversity of the destination which is scenic and peaceful as much as it is fast paced and active.

The vision for the Gold Coast as identified in the Gold Coast Destination Tourism Strategy 2012 – 2016 is for the region to be:

Globally recognised as a world-class leisure and business events destination famous for its unrivalled variety of entertainment, excitement and fun.

For the Gold Coast to achieve this aspiration, it is critical that there is:

- a coordinated approach to destination marketing and promotion;
- innovative product and infrastructure development across the region that delivers on the marketing promise; and
- a tourism industry that is operating at the highest standards of service, safety and sustainability through effective industry development programs.

CITY

The City of Gold Coast’s vision is:

*Inspired by Lifestyle, Driven by Opportunity.*

The vision drives the City’s corporate plan, and its portfolio of corporate strategies. The City of Gold Coast’s approach to long-term planning is based on the integration of the vision, corporate plan, long-term asset management and financial plans and corporate strategies.

Recent research has identified that current perceptions about the Gold Coast do not necessarily align with how the city would like to be positioned and that misconceptions and negative beliefs persist. To assist in changing these mindsets, a City Reputation Strategic Plan has been developed to provide an integrated marketing approach that will transform the Gold Coast and City reputation over the next ten years using the destination’s genuine competitive advantages.

The strategic intent for the Gold Coast by 2023 is to be:

1. Realising the benefits of the once-in-a-generation opportunity to reshape the city foundations through the major city-building initiatives of 2013 o 2023.
2. A city highly regarded across all of our target markets. We will have achieved the greatest improvement in reputation over the previous 10 years of any city in Australia.

“Unified in purpose and in process. Our growth is achieved through shared ownership of our city reputation, fostered through a strong and united digital presence that drives community pride and partnerships, and supported by an integrated city marketing approach.”

Source: Destination Tourism Strategy 2012-2016, TEQ and Gold Coast Tourism (2012)
Source: Gold Coast City Reputation Strategic Plan 2013-2023, City of Gold Coast (2013)
THE VISION FOR TOURISM IN QUEENSLAND

The Queensland Government has recently identified tourism as one of the four pillars of Queensland’s economy and as such, is committed to ensuring Queensland regains its place as Australia’s pre-eminent tourism destination.

The government’s election policy – DestinationQ – identified a new approach to tourism to create new opportunities and a sustainable future for tourism in Queensland, by setting a growth target for the industry to double overnight visitor expenditure to $30 billion by 2020.

FUTURE SOURCE MARKETS

Reaching Queensland’s 2020 target requires a clear strategy to target those source markets that will deliver the greatest contribution to overall visitor expenditure. To reach 2020 potential, the Queensland tourism industry will need to:

• Contribute 44% towards international and 56% towards domestic overnight 2020 targets;

• Increase the share of international expenditure by 91% between 2012 and 2020;

• Increase the share of domestic overnight expenditure by 58% between 2012 and 2020;

• Focus on attracting the Chinese Market with the goal of increasing market share of international expenditure by 92% from 2012;

• Leverage the marketing opportunities in the long haul markets of the United States, the United Kingdom and Europe to attract visitors more resilient to economic shifts, such as the affluent over 50s and youth travellers; and

• Partner with Queensland’s regional tourism organisations (RTOs) to increase the visitation to Queensland destinations from the New Zealand, intrastate and interstate markets.

VISITOR FORECASTS TO 2020

• Baseline Tourism Forecasting Committee (TFC) forecasts indicate that international visitor nights to Queensland will continue to grow at a steady pace. Achievement of industry potential (Deloitte Access Economics) would require Queensland to attract and retain visitation from Japan and New Zealand tourists and, potentially, capture new emerging markets such as India. Industry potential forecasts also anticipate strong growth in emerging markets, particularly China and India, with these countries growing both in absolute terms and as a proportion of the Queensland total. In terms of international visitors, there is expected to be a stronger shift in favour of the south east Queensland markets.

• Despite the previous fluctuations in tourism performance, domestic and international visitor nights to the Gold Coast are expected to increase under both the TFC forecast and industry potential forecasts. Gold Coast’s international market is expected to grow substantially over the next decade. Industry potential forecasts imply a 137% nominal growth in expenditure from international visitors over the next decade, reaching 14 million international visitor nights in 2020.

• In the case of domestic visitors, industry potential forecasts predict 19 million domestic visitor nights in the Gold Coast by 2020 (about 30% growth from 2010 levels), implying a 99% nominal growth in total tourism industry expenditure. TFC forecasts, however, are more subdued predicting 15 million domestic visitor nights by 2020 and 54% nominal expenditure growth.

Section 2

TOURISM MARKET ASSESSMENT

- Current Trends
- Hero Experiences
- Tourism Trends
- Visitor Trends
- Market Segments
- Competitor Analysis
CURRENT TRENDS

GLOBAL

The CSIRO has recently compiled a collection of trends, patterns of economic, social or environmental activity that will change the way people live and the science and technology products they demand.

A total of six were identified:

• **More from less.** The earth has limited supplies of natural mineral, energy, water and food resources essential for human survival and maintaining lifestyles.

• **Going, going ... gone?** Many of the world’s natural habitats, plant species and animal species are in decline or at risk of extinction.

• **The silk highway.** Coming decades will see the world economy shift from west to east and north to south.

• **Forever young.** The ageing population is an asset. Australia and many other countries that make up the Organisation for Economic Cooperation and Development (OECD) have an ageing population.

• **Virtually here.** This megatrend explores what might happen in a world of increased connectivity where individuals, communities, governments and businesses are immersed into the virtual world to a much greater extent than ever before.

• **Great expectations.** This is a consumer, societal, demographic and cultural megatrend. It explores the rising demand for experiences over products and the rising importance of social relationships.

NATIONAL

• **Strong competition** from domestic and international destinations.

• **Growth coming from Eastern markets** not Western, and growing in urban and not natural experiences.

• **Exchange rates** and growth in outbound visitors restricts growth domestically.

• **Key source markets economic pressure** reduces the volume of traditional markets.

• **Mobile technology** is changing the way many people plan their travel and interact in-destination – we must have the conversations where the customer is, otherwise they will have the conversation without us.

• **Growth in soft nature experiences** including glamping, ziplines and small eco-lodges.

• **Australians seeking authentic and positive engagement with Indigenous Australians** participating in mainstream experiences.

Emerging trends support increasing personalisation of the travel experience and the potential for more short-break travel.
CSIRO and the Queensland Government recently identified seven megatrends that are likely to shape the Queensland Tourism sector to 2033. The publication, entitled *The Future of Tourism in Queensland* aims to help develop a dynamic, collaborative 20 year plan for the industry.

A megatrend is defined as:

*A substantial shift in environmental, economic, social, technological or political conditions that has major supply-side or demand-side impact on tourism in Queensland.*

The seven megatrends identified for Queensland are:

1. **The Orient Express**
   The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.

2. **A Natural Advantage**
   In a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger drawcard.

3. **Great Expectations**
   Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.

4. **Bolts from the Blue**
   Climate change and infectious disease outbreaks combined with safety concerns will have increased impact.

5. **Digital Whispers**
   People are changing the way they access and trust information in an online world.

6. **On the Move**
   Humanity is increasingly mobile. Trade, business, events, education and healthcare are causing more people to travel further and more frequently.

7. **The Lucky Country**
   Australia and Queensland are increasingly wealthy, but expensive destinations gifted with cultural and demographic diversity.

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**GOLD COAST HERO EXPERIENCES**

A tourism ‘experience’ is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The ‘tourism product’ is what the customer buys; the ‘tourism experience’ is what they remember.

In alignment with the Gold Coast’s destination tourism strategy, four destination ‘hero experiences’ were developed in 2012 to deliver the region’s 2020 tourism vision, brand promise and the ‘themes’ that underpin the destination’s vision and brand.

Hero experiences are those **world class iconic experiences** that:

- Provide a destination with a **real competitive advantage** over other destinations;
- Focus on what is **truly unique or memorable** or engaging about a destination; and
- Meet the needs of identified target markets.

The four themes and associated ‘hero experiences’ identified for the Gold Coast region are:

**BEACHES**

The Gold Coast is the home of world-renowned golden surf beaches and outstanding waterways providing a selection of water-based activities and experiences to visitors. Surfers Paradise, Broadbeach and Main Beach are the most notable of all, each providing beautiful sun, warm clear waves and pristine sand.

**Hero Experience:** **Feel energised as you share fun and laughter with family and friends in the sunshine on the golden surf beaches and waterways of the Gold Coast.**
THEME PARKS

Well-known for its theme park attractions, the Gold Coast provides the ultimate playground in terms of fast rides, animal encounters, unique entertainment and memorable experiences.

**Hero Experience:** Create once in a lifetime memories that put a smile on your face as you feel like a kid again in the ultimate playground that is the Gold Coast theme parks.

ENTERTAINMENT

The Gold Coast is a hub of entertainment with a unique social atmosphere offering a vast array of shopping precincts, high energy sporting options and lifestyle events and unlimited entertainment and nightlife options.

**Hero Experience:** Soak up the social atmosphere of the Gold Coast’s vast array of shopping options, high energy sporting and lifestyle events and unlimited entertainment and nightlife options.

HINTERLAND

The Gold Coast’s hinterland features World Heritage-listed rainforests including Tamborine Mountain and Springbrook and Lamington National Parks. Here, unrivalled scenic value featuring beautiful waterfalls and an expanse of native flora and fauna can be found; a perfect setting offering a range of activities.

**Hero Experience:** Escape and feel revitalised as you search for hidden treasures in the villages and World Heritage-listed rainforests of the Gold Coast Hinterland.

DFWP as a visitor attraction and wildlife park is part of the entertainment business. Its product and experiences are most closely aligned with the Hinterland Theme.

TOURISM TRENDS

NATURE BASED & WILDLIFE

Interest in nature-based visitation is growing across Australia, with Tourism Australia estimating that there were approximately **3.6 million international nature visitors** to Australia in the year ending June 2013 (62% of all international visitors). In that same year, there were **14.8 million domestic overnight trips and 15 million domestic day trips** (20% and 9% of total visitors respectively) that included a nature-based activity. In Queensland, nature-based visitors have increased by 16% over the past five years and nature-based visitors **represent 13% of total visitors to the Gold Coast**. Of these, 22% of the State and 24% of the Gold Coast’s nature-based markets participate in a wildlife activity. Both nature-based and wildlife visitors (a subset of nature-based visitors) generally have a higher average length of stay and **spend per night** domestically compared to regular visitors.

<table>
<thead>
<tr>
<th></th>
<th>AUSTRALIAN VISITORS</th>
<th>Domestic Overnight</th>
<th>Day Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AVERAGE LENGTH OF STAY (NIGHTS)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Visitors</td>
<td>36.54</td>
<td>3.82</td>
<td>1</td>
</tr>
<tr>
<td>Nature-based</td>
<td>44.48</td>
<td>4.41</td>
<td>1</td>
</tr>
<tr>
<td>Wildlife Visitors</td>
<td>50.24</td>
<td>4.91</td>
<td>1</td>
</tr>
<tr>
<td><strong>SPEND PER NIGHT ($)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Visitors</td>
<td>$91</td>
<td>$179</td>
<td>$108</td>
</tr>
<tr>
<td>Nature-based</td>
<td>$87</td>
<td>$219</td>
<td>$106</td>
</tr>
<tr>
<td>Wildlife Visitors</td>
<td>$85</td>
<td>$310</td>
<td>$136</td>
</tr>
</tbody>
</table>

With a plethora of nature-based and wildlife opportunities available at DFWP and the potential to further add to these experiences, the

Source: National and International Visitor Surveys, Tourism Research Australia
Park has the opportunity to better harness this market and grow its market share.

OUTDOOR ACTIVITY-BASED

Outdoor activity-based experiences are becoming increasingly popular globally as well as in Australia. As such, consumers are progressively seeking destinations that are able to provide outdoor experiences. Nature-based and adventure tourism along with walking, mountain biking and water-based activities have all experienced an increase in participation over the last five years. Table 2 displays the percentage of total visitors to Australia who participated in these activities in 2012/13 (Year Ending June).

Table 2 Activity Participation Percentage of Total Visitors to Australia

<table>
<thead>
<tr>
<th>Activity</th>
<th>International</th>
<th>Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature Based</td>
<td>62%</td>
<td>12%</td>
</tr>
<tr>
<td>Adventure</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>Walking</td>
<td>22%</td>
<td>5%</td>
</tr>
<tr>
<td>Cycling</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Water Based</td>
<td>65%</td>
<td>19%</td>
</tr>
</tbody>
</table>

DFWP is well-positioned to work with partners such as the Tallebudgera Active Recreation Centre and Tallebudgera Beach School to develop outdoor activity based programs for educational and visitor groups.

EDUCATION

International students are one of the highest value tourism categories (second to holiday expenditure), with recent data indicating that international education expenditure was worth $5.9 billion in 2013 (YE June), representing a growth in visitors of 8% since 2009. Education tourism has contributed around 45% of the growth in tourism export earnings over the 1999–00 to 2010–11 periods.

In the year ending June 2013, it was reported that 37% of international visitors were visiting friends and relatives (VFR) and the VFR market has seen a significant growth as a direct result of growth in education tourism.

On the Gold Coast, nearly 17,000 international visitors to the region are education-based and this has increased by 2% since 2009.

Key education tourism markets include China, Hong Kong, Indonesia and South Korea for tertiary education as well as high school excursions and study tours.

From a domestic standpoint, Queensland has seen a 24% increase in domestic education visitation, however the Gold Coast currently captures only 9% of the State’s market share.

With academic institutions such as Griffith University, Central Queensland University and Bond University in close proximity, DFWP has the opportunity to better leverage its educational assets through the development of curriculum based programs and corresponding VFR visitation through targeted incentive packages.

CULTURE & HERITAGE

Nationally there is a growing interest in culture and heritage, with 25.6 million (10% of all visitors) participating in culture and heritage activities in 2013 (YE June).

The total number of visitors to the Gold Coast who participate in a culture and heritage* activity represents 8% of all visitors to the region and 47% of all Gold Coast international visitors.

However, while the Gold Coast growth in cultural visitors is promising, other destinations, with more cultural entertainment facilities, precincts and events have recorded even more significant growth. These growth rates are considerably higher than overall visitor growth rates, indicating the growing importance of cultural tourism to Australia.
With the Park’s own history and the potential for further developing its partnership with Jellurgal Cultural Centre, DFWP has the potential to further develop its culture and heritage based experiences to better harness this market.

*Culture visitors include those visitors which: attend the theatre or concerts, visit museums or art galleries, visit art and craft workshops and studios, attend festivals, fairs or cultural events, experience aboriginal art or culture, visit and aboriginal site or community, visit history, heritage buildings, sites or monuments (NVS and IVS Visitor Surveys).

**VISITOR TRENDS**

According to Tourism Research Australia’s National Visitor Survey (NVS), in 2013 (YE June) the Gold Coast received approximately 3,664,000 domestic overnight visitors and 7,401,000 domestic day-trip visitors. This is a 12% increase in domestic overnight visitors and a 21% increase in domestic day-trip visitors since 2009.

In terms of international visitors, International Visitor Survey (IVS) data indicates that the Gold Coast received 778,274 international visitors in 2013 (YE June), and this is down by 1% from 2009. The Gold Coast is also receiving 1% less of the Queensland market share than it did in 2009.

**ORIGIN OF VISITORS**

91% of day-trip visitors to the Gold Coast are from Queensland with 9% coming from New South Wales. For domestic overnight visitors, a large proportion is again from intrastate (48%) whilst the New South Wales (31%) and Victoria (14%) signify strong domestic markets for the Gold Coast.

<table>
<thead>
<tr>
<th>Origin</th>
<th>Percentage %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queensland</td>
<td>48%</td>
</tr>
<tr>
<td>New South Wales</td>
<td>31%</td>
</tr>
<tr>
<td>Victoria</td>
<td>14%</td>
</tr>
<tr>
<td>South Australia</td>
<td>3%</td>
</tr>
<tr>
<td>Western Australia</td>
<td>2%</td>
</tr>
<tr>
<td>Tasmania</td>
<td>2%</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>1%</td>
</tr>
<tr>
<td>Australian Capital Territory</td>
<td>1%</td>
</tr>
</tbody>
</table>

In terms of international overnight visitors, IVS data for YE June 2013 shows the top three countries of origin of visitors to the Gold Coast include China (24%), New Zealand (22%) and Japan (7%).

**AVERAGE LENGTH OF STAY**

The average length of stay for domestic overnight visitors to the Gold Coast is **4.0 days** and has decreased 3% since 2009. This is slightly lower than the than the State average of **4.2 days**. The international average length of stay of visitors to the Gold Coast is **9.8 days** and has remained fairly constant since 2009.

**GLOBAL AND NATIONAL TRENDS**

Consumer trends indicate:

- Australia has an ageing population
- Change in spending patterns – bargain-hunters
- Change in spending patterns – trading up
- Consumers are searching for health and wellbeing experiences as part of their holiday plans
- A greater desire for personalisation of the experience
- A desire for sustainable tourism
- That word of mouth is about the experience not the product (Experience Economy)

*Source: National and International Visitor Surveys, Tourism Research Australia*
MARKET SEGMENTS

INTERNATIONAL

Tourism Australia (TA) has defined its international target market as the ‘Experience Seeker’ who are globe trotters looking for authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture. Experience Seekers are Australia’s highest yielding international market and are more likely increase to their length of stay and average spend in comparison to others.

To promote the vast array of unique Australian adventures to this target market, seven key Australian Experience Themes have been identified:

1. Nature in Australia
2. Aboriginal Australia
3. Journeys
4. Outback Australia
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

The Gold Coast is home to products that deliver six of the seven experience themes (not Outback Australia).

China will become the Gold Coast’s largest international source market by 2020.

DOMESTIC

Tourism and Events Queensland’s (TEQ) extensive research into the domestic market has defined six market segments based on visitor needs and wants giving valuable insight into consumers’ emotional connection to what they expect from a holiday.

These market segments are seeking experiences that Queensland can offer under the following experience themes:

1. Natural Encounters
2. Queensland Lifestyle
3. Adventure
4. Islands and Beaches
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

COMPETITOR ANALYSIS

In investigating competitor and peer group performance, the study considered a number of key areas including:

- Pricing
- Financial Performance
- Annual visitation
- Market Awareness
- Market positioning
- Visitor Experiences

PRICING

- Adult entry price at approximately $20 is reasonable for a park which aims for a 1-2 hr average length of stay, provided that the product meets market expectations.
FINANCIAL PERFORMANCE

- Review of key financial measures for yield (admission, retail and food & beverage) show that current performance is below industry averages, although admission price is within the range of market norms.

Table 4: Visitor Attraction Financial Performance

<table>
<thead>
<tr>
<th>Performance Area</th>
<th>DFWP</th>
<th>Industry average for 1-2 hour park</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current adult entry price</td>
<td>$19.95</td>
<td>$20 - $25</td>
</tr>
<tr>
<td>Average admission yields</td>
<td>$10.72</td>
<td>$12 - $15</td>
</tr>
<tr>
<td>Average Retail Yields</td>
<td>$0.74</td>
<td>$2.50 - $3.00</td>
</tr>
<tr>
<td>Food &amp; Bev yields</td>
<td>$3.51</td>
<td>$4.50 - $5.50</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$14.96</td>
<td>$17.00 - $23.50</td>
</tr>
</tbody>
</table>

VISTOR NUMBERS

Visitor numbers are in part a reflection of the natural characteristics of a park, its site and location. DFWP is by its nature a relatively small wildlife park, although current visitor numbers (17,000) are a considerable drop from peak visitation of between 50,000 and 60,000.

There are a number of significantly larger wildlife and nature-based parks and visitor attractions competing in the same marketplace, including Queensland competitors in the form of Australia Zoo, Currumbin, Lone Pine Koala Sanctuary and Dreamworld (Table 5).

MARKET AWARENESS

Market awareness was considered as part of the overall competitor review. Analysis demonstrated that awareness of DFWP was extremely low. Google Trends analysis shows how often a particular search-term is entered relative to the total search-volume across various regions of the world, providing a useful indicator of awareness and interest – DFWP showed extremely low levels of searches compared to competitors (Figure 2).

![Google Trends Comparison](image)

Figure 2: Google Trends Comparison

Limited levels of market awareness were also confirmed via stakeholder feedback.

MARKET POSITIONING

A common feature in peer group facilities is clear market positioning and strong differentiators. Successful parks and visitor attractions are frequently well known for, or synonymous with certain shows or animals. For instance, Australia Zoo is well known for croc shows and Currumbin for lorikeet feeding (Table 5). DFWP does not have this clear differentiator at present, despite being previously associated with a number of species including the platypus.

VISITOR PRODUCT AND EXPERIENCES

Successful visitor attractions and wildlife parks continually invest in their products and provide fresh content and experiences for their visitors. Analysis of press and PR activity for the previous 2 to 3 year period in competitor facilities clearly demonstrates considerable levels of investment in new and refreshed visitor experiences (while
also demonstrating significant levels of marketing and communications activity). While DFWP has certainly benefited from investment, this does not seem to have been to the same level or via the structured approach taken in other facilities.

Another common feature among competitor facilities and experiences is the level of interaction with animals available to visitors – high levels of interaction (whether via formal shows, ‘show and tell’ sessions or via more informal means) is increasingly the norm in order to meet visitor expectations.

COMPETITOR SUMMARY

Competitor analysis and ongoing assessment of the strengths and weaknesses of current and potential competitors, forms a key context for a facility’s overall positioning, approach and strategic direction.

It is essential that the Park has a clear view on which its competitors are, has knowledge of customer expectations, and a clear view on key sector success factors.

Analysis of peer group facilities demonstrates a number of key issues as a context of master planning if DFWP is going to be competitive in the future;

- Awareness of pricing and the flexibility to respond to circumstances;
- The need to grow revenue streams and yields to achieve at least industry norms;
- Establishing a clear market position and experience differentiators;
- Growing market awareness from what is a very low base at present; and
- Developing new products and experiences in response to identified visitor trends and demand.

TEN TIPS FOR GREAT EXPERIENCES

- Share your local knowledge and secret
- Make it easy for customers to remember your story
- Give visitors a ‘backstage pass’
- Find and package up with little local hidden gem
- Make your experience share-worthy and easy to share
- Keep it simple
- Let your customers get friendly with your message and with the others in the experience
- Don’t be afraid to take chance
- Find your ‘nowhere else in the world’ experience
- What gets people talking is ‘surprise’ and ‘delight’.

Tourism and Events Queensland
<table>
<thead>
<tr>
<th>Competitor/ other wildlife parks</th>
<th>Entry Price</th>
<th>Annual Visitation (estimate)</th>
<th>Management Arrangement</th>
<th>Clear Differentiator</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Fleay Wildlife Park</td>
<td>$9</td>
<td>$13</td>
<td>$20</td>
<td>16,948</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Currumbin Wildlife Sanctuary</td>
<td>$33</td>
<td>$40</td>
<td>$49</td>
<td>382,551</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lone Pine Koala Sanctuary</td>
<td>$22</td>
<td>$24</td>
<td>$33</td>
<td>Not published</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia Zoo</td>
<td>$35</td>
<td>$47</td>
<td>$59</td>
<td>700,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dreamworld/ Whitewaterworld</td>
<td>$70</td>
<td>$70</td>
<td>$100</td>
<td>1,300,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phillip Island Nature Park</td>
<td>$11.30</td>
<td>$15.80</td>
<td>$23</td>
<td>1,050,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Melbourne Zoo</td>
<td>free</td>
<td>$20.70</td>
<td>$27</td>
<td>800,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healesville Sanctuary</td>
<td>free</td>
<td>$20.70</td>
<td>$27</td>
<td>280,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Melbourne Aquarium</td>
<td>$22</td>
<td>$29</td>
<td>$38</td>
<td>560,000</td>
</tr>
<tr>
<td></td>
<td></td>
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</tbody>
</table>
Section 3

SITE ANALYSIS/REVIEW OF PERFORMANCE

- Site Context and Analysis
- Current Profile
- Critique of the Park’s Operation
- SWOT Assessment
SITE CONTEXT AND ANALYSIS

SITE CONTEXT

The Park is located on the Gold Coast, on the western edge of Tallebudgera Creek, and accessed from the Pacific Motorway via Tsipura Drive and Tallebudgera Creek Road. The site is bordered to the north by the Tallebudgera Creek Conservation Park, West Burleigh Road to the west, and framed by Tallebudgera Creek to the south and east.

ACCESS

The Park is located only 2 minutes from the Pacific Highway (jct 89). However, it is not directly visible from the motorway, nor does it currently benefit from dedicated tourism signposting from the motorway. Public transport access to the site is limited, with Varsity Lakes being the nearest Railway Station (6km). Bus services from the Gold Coast stop at various locations close by, but there are no direct public transport services to the Park.

SURROUNDING GREEN SPACES

Access to the site via local footpaths and public rights of way is good - the Park’s location in relation to Tallebudgera Creek, Tallebudgera Creek Boardwalk, and the Burleigh Ridge open space network offer recognised opportunities to further strengthen linkages. The Park can be accessed via the Tallebudgera Creek walking circuit – providing a link between Tallebudgera Recreation Camp, Burleigh Head National Park and Information Centre with the Park. The Tallebudgera Creek Conservation Park walking track is 1.4 km long and connects the Park to Burleigh Head National Park through Gold Coast City Council’s network of green spaces.

The proximity of the motorway is a barrier to local connectors to a certain degree, but a range of pedestrian linkages do exist, connecting the Park and nearby areas such as Burleigh Heads and Burleigh Waters. Gold Coast City Council’s Burleigh Green Space Conservation Reserves Management Plan (2010) provides the key local policy/management context, noting:

“Burleigh Greenspace is an important part of the urban fabric of Burleigh for locals, proving a green refuge for walking, running, playing relaxing and nature appreciation....Trails within the reserves provide an extension to the popular walking trails in Burleigh Heads National Park, ...David Fleay Wildlife Park and walking tracks linking...
to the coast along Tallebudgera Creek, and this corridor is identified as a key pedestrian linkage in Council’s Priority Infrastructure Plan”.

The plan also notes the opportunity to link the reserves to planned public transport nodes and walking tracks on the western side of the motorway.

The Tallebudgera Creek itself offers potential as an additional linking artery. Although depths on parts of the Creek are variable, it is navigable by small craft and canoes/kayaks. Development of the Creek’s linking potential between the Park and the Active Recreation Centre and Beach School is a significant opportunity.

**PLANNING POLICY AND DEVELOPMENT CONSTRAINTS**

As part of the overall site analysis a review of extant planning policy has been carried out. In addition to the Burleigh Green Space Conservation Reserves Management Plan, the planning policy which most directly impacts on future development of the DFWP is the Gold Coast Planning Scheme 2003, Version 1.2, as amended on 14 November 2011. The Park is located in and subject to the provisions of the Burleigh Ridge Local Area Plan [LAP] [Ch 6.2.6]. Within Precinct 3 the following clause is of particular relevance:

“Development is to be limited to passive recreation facilities to maintain the generally natural profile and character of the Burleigh Ridge LAP.”

Also pertinent is the Ecotourism Development Code, one of the intents of which is to facilitate tourist and educational access to ecologically significant areas by providing well designed and managed nature based ecotourism facilities that are sympathetic to the natural environment.

The requirements placed on the Park by it being subject to listing on the Queensland Heritage Register also remain pertinent - particularly in relation to Fleays House and the Platypussary – these being the parts of the decommissioned area of the site which continue to offer most potential for future re-presentation as Park assets with appeal to visitor markets.

While further detail of individual proposed developments is required to conduct a full review against the extant policy framework, it can be noted that future development will need to take place within a policy framework which focuses strongly on informal recreation within the context of the Park’s surrounding natural habitats.

**STRATEGIC TOURISM LOCATION**

The Park benefits from a strong strategic tourism location – the Gold Coast is a key national tourism destination, with large volumes of visitors attracted to the nearby theme parks and the attractions of the beaches and coastal strip from Palm Beach up to Broadbeach and Surfers Paradise. The Gold Coast is a high volume tourism destination ‘famous for fun’, however the Park is situated in a quite location surrounded by impressive mangrove/saltmarsh, rainforest, eucalypt open forest and swamp oak/paperbark closed forest and wetland habitats. The Park alongside its surrounding green spaces and visitor attractions offer an interesting set of visitor experiences for the Gold Coast as a destination, alongside the nearby beaches and theme parks which it is synonymous with.

**SURROUNDING VISITOR ASSETS**

In addition to the attractors and experiences offered across the Gold Coast as a whole, facilities and destinations immediately adjacent to the Park include Burleigh Heads National Park and surrounding green spaces, the Tallebudgera Beach School and Active Recreation Centre, and the Jellurgal Cultural Centre. This node of visitor facilities shares a geographic proximity as well as a number of synergies in terms of visitor markets and visitor experiences. Opportunities are apparent for further development of links between these facilities and destinations.
**SITE ANALYSIS**

An analysis of the site has been carried out from a visitor perspective. Key issues are summarised in the following section of the report.

ADVANCE INFORMATION

Finding advance information about the Park from websites is not straightforward at present. Content about the Park can be found by searching the NPRSR website, and via Gold Coast Tourism’s consumer portal, however, the Park does not have its own website. The Park does not have a Facebook or social media profile at present.

ACCESSIBILITY

The Park is suitable for wheelchair access with some assistance. Disabled parking is available in the car park.

OPENING HOURS

The park opens from 9.00 am to 5.00 pm seven days a week, every day of the year except Christmas Day and Anzac Day morning. The cafe is open from 10.00 am to 2.30 pm. The nocturnal house is open from 11.00 am to 5.00 pm. Opening hours are appropriate for a venue of its type and location.

ARRIVAL

Entrance to the Park is via the visitor car park located off Tallebudgera Creek Road. On arriving at the boardwalk exit from the car park, visitors have the option to walk around the mangrove boardwalk, or walk up to the Park entrance via the accessible boardwalk entry. From a visitor perspective, the initial entrance to the park is welcoming and very well maintained.

ENTRANCE

Entrance to the Park is via the visitor centre at the top of the boardwalk entry, with tickets available to purchase at reception. Advance/pre-arrival ticket sales are not currently available via the NPRSR website.

VISITOR CENTRE

The visitor centre provides the key orientation point for visitors to the Park – providing café and restroom facilities, a limited retail offer at the reception area and range of interpretive materials.

CAFÉ AND RETAIL

The visitor centre has a large café area, serving a range of hot and cold meals and snacks for visitors. The back of house kitchen area’s space and facilities are appropriate to the current scale of visitor activity although a commercial convection oven will be required if future visitor volumes grow. Given the relatively low volume of visitors to the Park at present, the range of lines and meals on offer is high. As a means of growing yields and controlling costs, consideration should be given to reducing the number of lines offered, at least in the short term.

A limited range of souvenirs and retail offerings are available via reception. There is not a dedicated retail area/shop. Lack of a dedicated retail area places major limitations on revenue generation in this key area – it is recommended that urgent consideration should
be given to re-establishing a dedicated retail area, subject to appropriate management and control.

Layout within the visitor centre can be improved through relatively minor changes, including removal of the partition walls which enclose the current meeting room. Creation of a larger open plan area offers the opportunity to establish a new retail area as well as providing a space which is more inviting to visitors.

**INTERPRETATIVE MATERIALS IN THE VISITOR CENTRE**

The visitor centre contains a range of wall and banner mounted interpretative materials, a television showing video footage of the Park, and a number of displays cases with materials relating to the Park’s history and heritage. However, a clear storyline is not immediately available from the interpretative materials available, and the materials as a whole do not encourage visitors to spend a significant amount of time learning about the Park.

It is recommended that the interpretative strategy is reviewed with an outlook towards establishing a clear storyline which relates to the Park’s vision, it history and the differentiating hero experiences which the Park offers to visitors. If the Park is to perform an effective gateway role for QPWS, its National Parks and wide range of conservation work, integration of this messaging into interpretative materials is critical. Similarly, the life and achievements of David Fleay are major components of what is distinctive about the Park and should be a core element of the interpretative approach – bringing this story to life in an engaging manner for today’s visitors.

Materials also need to reflect the Park’s core visitor markets, including the schools and education market, using alternative technologies for interpretation where appropriate.

**SITE ORIENTATION**

Site orientation for the core visitor experience is straightforward – primarily being a circular route from the visitor centre around the Park’s central water features (Moon and Ring Dams). The Boardwalk is well maintained.
There are parts of the Park which are not currently accessible to visitors – decommissioned areas include the former aviary, the platypussary and the Fleys House. A circular walking route (accessed via the cassowary pathway) leading into the eucalyptus woodland habitat is also not currently accessible to visitors.

The mangrove boardwalk around the edge of the site allows visitors to experience the surrounding mangrove habitat, without entering the Park itself.

**PARK FEATURES AND SERVICES**

The park features three distinct wildlife habitats that can be explored along a network of boardwalks and paths - wetland, rainforest and open eucalypt forest, providing the backdrop to exhibits showcasing iconic Queensland and Australian wildlife.

Key animal exhibits include;

- Koalas
- Dingoes
- Emus
- Kangaroos and rock wallabies
- Brolgas
- Bilbies
- Snakes and reptiles
- Tree Kangaroos
- Southern cassowary from the rainforests of North Queensland
- Platypus
- Freshwater and estuarine (saltwater) crocodiles
- Lumholtz’s tree-kangaroo
- Yellow-bellied gliders and endangered mahogany gliders.

This is not a complete listing of the animals on site, but does demonstrate the range of animals on show to visitors, and the key experiences provided.

A key feature of the Park is the Nocturnal House, providing an effective means of displaying a range of nocturnal species including the platypus, gliders and bilbies.

Daily programs of wildlife presentations are in place;

**Summer/Spring Program**

- Fur, feathers and scales (presentation on backyard life orientated to kids)
- Opening of Nature by Night (discover platypus and other nocturnal species)
- Crocodile feeding
- Snakes up close
- Tree kangaroo capers
- Platypus feeding.

**Winter/autumn program**

- Fur, feathers and scales (presentation on backyard life orientated to kids)
- Opening of Nature by Night (discover platypus and other nocturnal species)
- Cassowary quest keeper talk
- Snakes up close
- Tree kangaroo capers
- Platypus feeding.

The Park offers a range of school holiday activities as part of Queensland Parks and Wildlife’s (QPWS) Connect with Nature program, including ‘Wildlife ranger experience’ activities. Children from 6 to 9 and 10 to 12 years of age help prepare food to feed the wildlife.

**School/Education Group Visits**

The Park has special ranger-guided environmental education and cultural awareness programs tailored for school groups. Curriculum-based programs are available for students from preschool to year 12. The main focus points of the education programs are threatened species, habitats and animal adaptations, life cycles and food webs. Programs for secondary students can also focus on classification, biodiversity conservation and the adjacent mangroves along Tallebudgera Creek and utilise inquiry-based learning principles. Teachers are also offered free entry to the park for a pre-visitation/excursion inspection. This free visit gives teachers the
opportunity to see the park and its education programs first hand. It is also an ideal opportunity to discuss individual needs.

ANALYSIS OF THE VISITOR EXPERIENCE

Appearance and Upkeep

The Park is well kept in terms of being clean and tidy, and the central boardwalk provides effective orientation. However, parts of the site are tired and in need of refurbishment. This particularly relates to a number of exhibits which are currently vacant or have a limited volume of animals compared to the size of the enclosure. While there is a good overall volume of wildlife across the park, it is understood that the policy decision not to breed animals on site has resulted in a gradual decrease over time in the volume of a number of species.

The Park is scheduled to benefit from a program of water quality improvement works in the first half of 2014 which will greatly improve the quality and appearance of the water and wetlands habitats. There is a need to freshen up the overall product by removing unnecessary fences around the Park, repair pathways where needed and establish a more co-ordinated and effective signage system.

Visitor Experience

Visitors explore the park from boardwalks and pathways – this approach is based on the ethos of animals being viewed in settings as close as possible to their natural homes.

This conservation-led ‘edu-tainment’ approach is clearly understood, but unless explained fully to visitors, a number of key visitor experience issues are apparent:

- Market expectations for the sector have evolved - interactive enjoyment is the focus. Review of customer feedback was largely positive, but did not indicate the ‘wow’ factor normally felt when visitors have had outstanding experiences
- While the Park does offer a range of daily presentations, additional ‘show’ content is required to compete fully in the market and provide new attractors. This can include new shows and animals but can also be developed from the ‘show and tell’ potential of the Park’s current collection. The Park’s croc feeding platform is a good example where a greater degree of appropriate interaction can be developed. The aim should be to achieve greater differentiation of product and tours on offer – ideas such as behind the scenes tours, MP4 players with information content offer potential
- The staff’s passion and knowledge of wildlife and conservation stood out - the Ranger-led approach to delivery of experiences has the potential to be a key differentiator for the Park
- Schools, families and children are key audiences. While the Park does have a broad range of exhibits, there is a lack of “interactivity and fun” for families to encourage dwell time and grow average length of stay. It was concluded that at present, there are insufficient experiences or opportunities for informal ‘fun’ to retain kids’ interests for a full 2hr stay
- From a messaging point of view Park lacks “storyline”, and clear “expectations of visitors’ experience”. The Park has an opportunity to create an emotional attachment with visitors - clear interpretative materials, driven by a guiding strategy is
key to achieving this. The Park has a number of great assets including its history with the platypus, and the nocturnal house facility, however from a visitor perspective, at present it is not synonymous with a star or hero experience - this needs to be established.

- The closed enclosure approach is not conducive to natural “up close and personal” experiences with animals. While it is entirely appropriate that certain species are observed and experienced in this way, there are opportunities to open up visitor interaction in some areas i.e. kangaroo enclosure.

- From a visitor expectation perspective it is essential that the site feels active and full of animal life. A species management plan should address management of the collection, viewed against the Park’s new vision and objectives and the Park’s available enclosure space and infrastructure.

- A clear policy stance as part of overall vision and objectives is required regarding the balance between a conservation-led approach and meeting visitor expectations of a wildlife centre. A conservation-led approach can provide the Park with an edge and give it differentiation in the marketplace, however the position needs to part of the Park’s identify and clearly feature throughout interpretative and marketing materials. Its hero experiences and positioning will need to flow from this policy position.
**CURRENT PROFILE – DAVID FLEAY WILDLIFE PARK**

**Type:** Wildlife Park  
**Area:** approx. 26 hectares  
**Visitor Numbers:** approx. 17,000  
**Entrance Fees:**  
$19.45 adult  
$8.95 child (4-17yrs)  
$12.90 concession

**MARKET PROFILE**

The decline in visitor numbers and lack of marketing was considered by consultants to be a major weakness identified in the review. Although only one factor, decreasing investment in marketing of the Park mirrors the falls in visitation and revenue over the last decade. The Park’s marketing budget has decreased from $71,500 in 2002/3 to “no budget” being identified for the current financial year. Historically the Park also had a dedicated marketing/education officer, which is no longer the case.

While recognising that economies in public sector investment have needed to be made, lack of market profile has clearly been a key factor in declining performance.

**REVENUE GENERATION AND COST STRUCTURES**

DFWP is not currently structured to be primarily focused on profitability as a key goal. However, to establish a relevant baseline it has been important to undertake a review of the existing financial information available to understand the current cost structures and revenues.

Detailed financial information for DFWP including revenue streams are not able to be published as they are commercial in confidence. However available financial data has been analysed as a key element of the research to inform the master planning process.

DFWP has a cost structure based on:

- Salaries & Wages
- Site Maintenance
- Overhead Budget
- Park conservation and animal welfare and food
DFWP has a revenue structure based on:

- Admission fees (approximately 20,000 visitors).
- Cafe and retail sales.

Based on analysis of Total Costs and Total Revenue it has been assessed that the DFWP currently operates as a Government cost centre and requires a substantial level of subsidy to operate.

**CURRENT VISITOR MARKET**

Most recent annual visitor figures indicate a total of approximately 17,000, comprised of:

- 20% education and schools
- 6% groups
- 74% independent visitors and free of charge.

Detailed demographic information is not recorded at present, but analysis of ticket category sales and staff feedback suggests a number of key characteristics to note;

While the relatively low market profile and limited recent marketing have to be taken into account, the importance of school groups and concessions can be observed.

**KEY VISITOR MARKET CHARACTERISTICS**

- A predominantly local visitor market
- A broad range of relatively low volume visits from conservation and community groups
- Approximately 10% of ticket sales are in the senior concession category
- Approximately 10% of ticket sales in the children ticket category
- Relatively low levels of annual pass sales
- Family tickets account for a low proportion of overall ticket sales
- Adult ticket sales account for approximately 33% of overall sales

**CRITIQUE OF THE PARK’S CURRENT OPERATION**

Preparation of the Draft Master Plan has been conducted at a critical time for the Park - costs are rising while visitor number and revenues are falling. Figure 4 demonstrates the challenging position which the Park finds itself in – a combination of attracting greater visitor numbers and growing average visitor expenditure is required to reverse the decline.

Unless managed decline is acceptable, the Park is failing to maintain visitor volumes, but remains a significant investment for Government.
**Table 6: SWOT Assessment**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Staff passion</td>
<td>• Clarity is required on the balance between DFWP visitor attraction and conservation objectives</td>
</tr>
<tr>
<td>• History of the Park and David Fleay</td>
<td>• Current financial procedures are not conducive to supporting business operation - clear knowledge of visitor demographics, yields and costs are pre-requisites</td>
</tr>
<tr>
<td>• Proximity of the large Gold Coast visitor market</td>
<td>• DFWP’s flexibility on entry pricing is severely limited by ‘regulated entry fees’</td>
</tr>
<tr>
<td>• Proximity of Tallebudgera Active Recreation Centre and Beach School</td>
<td>• Current management model, lines of reporting and decision making processes are not conducive to the Park competing in the marketplace as a visitor attraction</td>
</tr>
<tr>
<td>• Park is easy to navigate and walk around</td>
<td>• Insufficient entertaining and interactive experiences</td>
</tr>
<tr>
<td>• Authentic feel</td>
<td>• No defining USP or differentiator apparent to target markets</td>
</tr>
<tr>
<td>• Conservation focus</td>
<td>• Physical infrastructure is tired in parts – a significant makeover is required</td>
</tr>
<tr>
<td></td>
<td>• Depletion of animal collection – too many vacant or sparse exhibits</td>
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<tr>
<td></td>
<td>• Structure of park with fencing of endangered species program is not conducive to natural open experience and “up close and personal” with animals</td>
</tr>
<tr>
<td></td>
<td>• No highway or main road directional signage</td>
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<tr>
<td></td>
<td>• The Park lacks “storyline”, and clear “expectations of visitors experience” and fails to create “emotion for visitors”</td>
</tr>
<tr>
<td></td>
<td>• Lack of commercial and marketing activity to attract visitors and yields, leading to lack of profile</td>
</tr>
<tr>
<td></td>
<td>• While low overall visitor numbers provide challenges, the scope of revenue generating services is limited</td>
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<td></td>
<td>• No public transport access</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• State Government commitment to DFWP as a gateway park and as flag-bearer for the emerging ‘NP’ brand</td>
<td>• DFWP has lost market share over recent years while competitors have invested and filled the space - without ongoing commitment to turn the Park around, regaining lost ground will be challenging</td>
</tr>
<tr>
<td>• Positive market trends for nature-based visitor attractions</td>
<td>• Failure to agree a clear vision for the park including the balance that is struck between conservation objectives and meeting visitor demand</td>
</tr>
<tr>
<td>• A partnership approach to growing volumes and controlling costs</td>
<td>• Elements of previous master planning and strategic exercises have been ‘false starts’, with much remaining undelivered. The Park cannot afford another aborted strategic plan</td>
</tr>
<tr>
<td>• Edutainment focus, linking to conservation but delivered with an entertainment focus can provide an edge</td>
<td>• Staff and management skillsets need to align to the Park’s vision and objectives</td>
</tr>
<tr>
<td>• ‘Ranger-led’ experiences</td>
<td>• If status quo remains unaltered, managed decline will continue</td>
</tr>
<tr>
<td>• Fully developing links with Tallebudgera Active Recreation Centre and Beach School</td>
<td></td>
</tr>
</tbody>
</table>
Options and Preferred Concept

- Option 1 – Free Entry Facility
- Option 2 – Invest for Success
- Option 3 – Create New Hero Experiences
- Option 4 – Focus on Outdoor Recreation
- Option 5 – Gateway/ Community/ Education Hub

Next Steps
OPTIONS AND PREFERRED CONCEPT

As part of the review process in preparing the draft master plan and vision, a range of options for the Park’s future were established and tested as a means of determining a preferred concept and a way forward. The options were developed as a means of facilitating debate and understanding of the future challenges facing the Park, rather than as pre-determined ideal solutions.

All options were considered against the reference or base case, where the status quo was maintained, and the potential of the Park would not be realised, in terms of:

• A gateway/showcase opportunity for QPWS and Queensland’s wildlife
• A community asset
• A visitor attraction, and
• Legacy of the Park is unfulfilled.

OPTION 1: FREE ENTRY FACILITY

Park entry fees removed, and the managed wildlife exhibit footprint pared back to a smaller area. The product could be based on quiet enjoyment and a more limited range of hand-on animal conservation experiences.

Pros:

• Potential to generate significantly higher volumes of visitors, achieving a number of strategic objectives
• Potential synergy with gateway, community and conservation remits.

Cons:

• Competitive neutrality concern
• Car park constraints for larger numbers of visitors
• Places emphasis on revenue generation within the Park, requiring a more commercial, business-minded approach
• Perceived value can be diminished by free entry

Review and Consultative Feedback:

• A free entry model would drive increased visitation but tempered with the reality that free facilities are not always fully valued by customers
• Free entry causes a significant neutrality concern
• In order to balance costs and revenues, a focused approach to in-park revenue generation would be required
• A number of variations were raised as potential considerations, including; ‘small note entry’, and ‘kids go free’ with paying adult

• Recommended that elements of a free entry model are considered as part of the preferred option
• Sensitivity testing on the impact of free entry should be carried out as part of subsequent business planning.
OPTION 2: INVEST FOR SUCCESS

Significant investment in upgrading the visitor experience offering a focused visitor experience + marketing + education programs + links with surrounding environments + reintroducing the gift shop.

Pros:
• Synergy with gateway, tourism and conservation remits
• Offers the opportunity to compete and grow market share
• Provides the means of re-establishing the Park in the marketplace.

Cons:
• A USP and clear differentiators are pre-requisites prior to investment decisions
• Unclear if there is a space in the market
• Significant investment is required to grow from current base.

OPTION 3: CREATE NEW HERO EXPERIENCES

Create a unique hands-on animal-based experience. The total footprint of the site may be pared back to create a more concentrated visitor experience, alongside upgrading the retail and food & beverage offers to maximise income with a higher entry price point.

Pros:
• Successful development and implementation of hero experiences offers market potential
• Opportunity to revitalise the Park and create a sustainable future
• A clear wildlife enjoyment/conservation rationale is retained.

Cons:
• Unclear if there is a space in the market for a USP
• Competitive marketplace - sustained and targeted marketing is required to support the Park in regaining its position
• Significant investment is required to generate growth from the current base.

Review and Consultative Feedback:
• Redevelopment of DFWP as a competitor to the large theme parks viewed as unrealistic
• Investment and development must be appropriate to location, visitor demand and agreed Vision
• Recognition of the scale of investment which would be necessary and the need for clarity on return on investment/KPIs
• Appropriate investment in order to compete in the marketplace was recognised as being crucial, and was seen as having to be part of the preferred concept.

Review and Consultative Feedback:
• Acknowledgment of the need for a signature hero experience – ideas included ‘be a junior park ranger’ for the day, being ‘edu-tainment’ driven, and recognising the benefits of conservation-led
• While acknowledging the conservation-led ethos, recognition that interaction and entertainment are critical in meeting visitor expectations
• Creating clear USPs and differentiators recognised as being critical to the Park’s future
• Potential of links with endangered species programs recognised - a potential differentiator
• Consensus that experiences based around wildlife enjoyment/conservation but delivered in an entertaining manner should be at the heart of DFWP’s future.
OPTION 4: FOCUS ON OUTDOOR RECREATION

Remodelled to focus on the Education and Outdoor Recreation sectors to a greater extent, incorporating further development of physical links with the ARC and Beach School. Orientated to the family and education markets, the product is based on active enjoyment and things to do, as well as animal-based conservation. Lower park entry fees with more fee-paying activities introduced as potential elements of pricing policy.

Pros:
• Offers potential for a differentiated product
• Family and education markets offer good opportunities
• Potential for USP development, linking the Park’s history and new outdoor recreation focus.

Cons:
• A major change in focus
• May require relocation of a large number of the animal exhibits
• Other facilities are already established in this market space.

OPTION 5: GATEWAY/COMMUNITY/EDUCATION HUB

A gateway to National Parks sites, and community hub, fully aligned with the national curriculum, orientated to a local community, with potential for further development of heritage interpretation, and links with the Jellurgal Cultural Centre.

Pros:
• Offers potential for differentiation and an opportunity to delivery on the Park’s legacy
• Clear focus on community enjoyment and beneficiaries
• Synergy with ambitions to grow visitor numbers and relate more strongly to the local market

Cons:
• A clear USP and ‘reason to visit’ is required in order to perform a gateway function
• Dedicated resources and new curriculum-based packages are required to target and service the education sector
• Clarity is needed in terms of defining the focus of the gateway role and how it will be delivered
• Targeting these visitor markets may limit revenue generation potential.

Review and Consultative Feedback:
• Recognised as offering opportunities to generate improved average visitor length of stay if new products and experiences are complementary to existing attractors and assets
• Potential to unlock links with Tallebudgera Active Recreation Centre and Beach School
• ‘Cool green walks’ and bike trails linking into surrounding rights of way/existing trails seen as a practical entry point/niche for additional activities
• Appropriate recreational development/links viewed as being complementary to the core DFWP product, but not the prime focus.
NEXT STEPS

Following review of the 5 options with the project reference group, each was considered against a set of criteria in order to establish a preferred option and concept.

OPTIONS ANALYSIS

A preferred concept should incorporate;

- Development of a differentiated set of products and experiences which offer compelling ‘reasons to visit’
- Delivery of a gateway function for OPWS, growing awareness of the Service’s State-wide parks and wildlife assets among target visitor audiences
- The potential to generate market share, leading a sustainable future
- A demonstrably market-informed solution delivering entertaining experiences
- A solution which builds on the Park’s heritage
- The opportunity for the Park to develop as a gateway site
- The potential to develop and grow as a valued community asset
- Promotion of conservation ideals
- Deliverability, with no insurmountable regulatory hurdles.

Elements of each of the 5 options, determined against the criteria set out above, have been incorporated in developing the preferred concept and vision which is set out in Parts 2 and 3 of the Draft Master Plan.