

# Research Report

## Cooly Rocks On 2013

Prepared for the  
Cooly Rocks On Festival Committee

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## *EXECUTIVE SUMMARY*

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The research report provides a summary of the research conducted at the Cooly Rocks On festival held in the Southern Gold Coast region of Queensland, and the Tweed Shire of NSW from May 31 to June 10, 2013. The research was commissioned by the festival managers to provide a market research study describing the characteristics and expenditure patterns of visitors, and to report on their experiences.

The report provides an estimated economic assessment of the contribution of the event to the local economy and compares results to two previous years of research. Data was collected during and after the event, using paper-based survey from a sample of 990 spectators and participants. This data was entered by Cooly Rocks On volunteers and analysed by the qualified staff at Destination Research & Development to provide this report.

The event attracts a consistent audience of increasingly older age groups predominantly in the older 40-55yrs and 56+yrs segments. The research suggests that while most visitors (62%) came from QLD, a significant proportion also came from interstate and overseas. Furthermore, 25% came from NSW, and an increasing number came from further afield including Victoria, Western Australia and New Zealand. More than 82% of visitors came to the Southern Gold Coast specifically for the event. They stayed for an average of 6.0 nights and many utilised rented houses and apartments, with less people returning to their own homes and choosing to stay in commercial accommodation. The total estimated economic impact to the region from visitors outside the Southern Gold Coast region was over \$33 million.

Many event visitors have returned to the event, with most respondents indicating they were aware of the event from previous participation (43%), word of mouth (31%) or the internet (15%). This high incidence of repeat visitation (and word of mouth promotion) makes the quality of experience even more important to event managers. In this respect it is pleasing that satisfaction levels remain very high with all aspects of the event including the 'organisation' and 'atmosphere'. The social opportunities for enthusiasts and their clubs are key to the event's success. A range of suggestions were collected relating mainly to entertainment options, programming or scheduling and facilities. These have been categorised and are detailed in the Appendix.

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## DEMOGRAPHIC PROFILE

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The demographic profile of visitors highlights the attraction of the event to a consistent audience of older adults who are avid enthusiasts of the rock'n'roll era. Visitors came from both local and visiting regions, attending the event in small groups of around 5 people, but also in larger recreational car and dance clubs of between 10 and 50 people.

### AGE AND CHILDREN

The event attracts a consistent audience of increasingly older age groups. The age profile of this audience is predominantly in the older 40-55yrs (28%) and 56+yrs segments (45%). These two segments make up 73% of all the audience.

TABLE 1: AGE GROUPS

Age	2011	2012	2013
Under 12	8%	7%	6%
13-17 yrs	5%	3%	5%
18-39 yrs	22%	15%	17%
40-55 yrs	36%	32%	28%
56+ yrs	29%	43%	45%

### GROUP SIZE

Special interest groups including recreational dance and car clubs are an important part of the audience. The average group size of event attendees in 2013 was similar to previous years at 5.0, with a number of larger groups recorded between 29 and 50 persons coming from New Zealand, South Australia, Victoria, Sydney, and the regions. The similarities between group size and point of origin suggest that many of these are clubs annually travel to the event.

### SPECIAL INTEREST GROUPS

Many event visitors enjoy participating in activities as either dancers or 'rodders' in the many contests, workshops, cruises and show'n'shine. Approximately **40%** of the respondents classifying themselves as participants and **55%** as spectators (5% were other such as volunteers). Participants are an important group who, in turn, increase the enjoyment of spectators. Participants of car and dance clubs are prepared to travel long distances to attend. They are very proud of their social identity, and belong to social clubs, and are therefore interested in buying merchandise and retail items that are authentic to the era of their interest.

## PLACE OF RESIDENCE

The event attracted visitors from a wide range of generating regions in Queensland as well as in NSW. There was an increase in visitors from other states of Australia as well as from Overseas. Two forms of analysis are provided to assess the place of residence; a postcode analysis, and annular analysis, as shown below.

### POSTCODE ANALYSIS

The postcodes of respondents were coded into regions and States as shown in Table 2. and compared to results from previous years. Visitors came from the same 17 regions throughout Australia including QLD, NSW, VIC, SA, WA, TAS and the ACT to see the event. Other notable results include:

- 96% came from outside the Southern Gold Coast area.
- A slight decrease in visitors from Victoria.
- Brisbane, Toowoomba and the Gold Coast remain the main geographic markets providing 46.5% of visitors.
- Interstate visitors accounted for a total of 35.2% including NSW.
- International visitors from NZ and the USA continued to increase in 2013 from 2.4% to 3.1%.

TABLE 2: PLACE OF RESIDENCE

State	Region	2011	2012	2013
<b>QLD</b>		<b>68.5%</b>	<b>63.5%</b>	<b>61.7%</b>
	Brisbane	25.7%	23.8%	22.6%
	Other Gold Coast	19.3%	14.2%	14.8%
	Toowoomba	11.0%	8.2%	9.1%
	Sunshine Coast	5.2%	7.9%	7.0%
	Southern Gold Coast	5.1%	4.0%	3.8%
	Central & Nth QLD	2.0%	5.5%	4.4%
<b>NSW</b>		<b>21.3%</b>	<b>21.8%</b>	<b>25.5%</b>
	Tweed Shire	10.2%	6.1%	8.2%
	Northern Rivers	4.6%	2.5%	3.3%
	Sydney	3.0%	5.2%	4.7%
	Hunter Region	2.9%	3.1%	2.9%
	North Coast NSW		2.4%	2.7%
	South Coast NSW	0.6%	1.8%	2.2%
	Other NSW		0.6%	1.5%
<b>VIC</b>		<b>6.2%</b>	<b>8.3%</b>	<b>6.8%</b>
<b>OS</b>	NZ and overseas	<b>0.8%</b>	<b>2.4%</b>	<b>3.1%</b>
<b>SA</b>		<b>1.9%</b>	<b>1.5%</b>	<b>1.4%</b>
<b>ACT</b>		<b>0.7%</b>	<b>0.4%</b>	<b>0.5%</b>
<b>TAS</b>		<b>0.5%</b>	<b>0.3%</b>	<b>0.5%</b>
<b>WA</b>		<b>0.2%</b>	<b>1.3%</b>	<b>0.5%</b>
<b>Total</b>		<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

## ANNULAR REGION ANALYSIS

An annular region analysis provides an alternate method of analysing the distances audiences have travelled to the event, by plotting their postcodes on an annular map. The results (illustrated in Table 3) show that approximately 73% of the audience were attracted from more than 50 kilometres away. Consistent with the results of 2012, almost 24% of the audience travelled more than 600km to attend the event from Sydney, Victoria, ACT and Western Australia

TABLE 3: PLACE OF RESIDENCE – ANNULAR ANALYSIS

Region	2011	2012	2013
Less than 50kms	34.6%	24.4%	26.8%
51 -100km	30.2%	26.4%	26.0%
101-200km	10.8%	8.2%	9.1%
201-600km	5.2%	10.3%	9.7%
600+km	9.0%	16.4%	15.4%
Interstate (non- NSW)	9.5%	11.9%	9.9%
International	0.8%	2.4%	3.1%

## ACCOMMODATION USE AND LENGTH OF STAY

Day trippers comprised 20% of the audience, with these people returning to their own home. However, an increasing proportion of visitors choose to stay in the area, utilising the commercial accommodation including rented houses or apartments (33%), hotels/motels 32% and caravan parks. As shown in Table 4, the number of people returning to their homes is decreasing each year, with more visitors staying for longer in commercial accommodation.

Of the **80%** of respondents who stayed overnight or longer the average night stay was 6.0 nights. Stays ranged from 1 night to 30 nights, with most people choosing 7 nights (mode = 7) and of these, 83% of overnighters stayed in QLD, 17% in NSW.

More visitors utilised all forms of commercial accommodation (rented houses and apartments, hotels) as well as an increased number indicating they were using Timeshare.

FIGURE 1: ACCOMMODATION USE

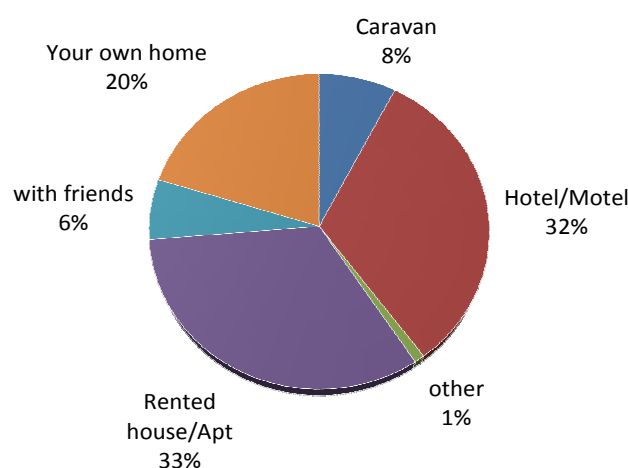


TABLE 4: TYPE OF ACCOMMODATION USED

Type of Accommodation	2011	2012	2013
Rented house or apartment	22%	31%	33%
Hotel/Motel	26%	30%	32%
Your own home	39%	22%	20%
Caravan/campsite/motor home	5%	8%	8%
With friends	5%	7%	6%
Other	3%	2%	1%

The places where visitors stayed were consistent with previous years, as shown in Table 5. Coolangatta (including Rainbow Bay) was the most highly used area for accommodation; with 53% of the audience choosing to stay in this area, a slight increase from previous years. Other areas around the event such as Kirra and Tweed Heads and other parts of Tweed Shire are also utilised for accommodation. The number of people using accommodation in other parts of the Gold Coast continues to fall.

TABLE 5: LOCATION OF ACCOMMODATION USED

Accommodation Location	2011	2012	2013
<b>NSW</b>	<b>18%</b>	<b>20%</b>	<b>17%</b>
Tweed Shire	18%	20%	17%
<b>QLD</b>	<b>76%</b>	<b>79%</b>	<b>83%</b>
Coolangatta	47%	48%	53%
Gold Coast & Surfers	11%	9%	7%
Other Southern Gold Coast	17%	22%	19%
<b>Unknown</b>	<b>6%</b>	<b>1%</b>	<b>0%</b>

## PURPOSE OF VISIT

Survey respondents were asked two questions with regards to the purpose of their visit. Firstly whether they were in the area specifically for the event, and secondly, in what capacity they were attending the event.

82.8% of the audience came to Coolangatta specifically for the event, including most interstate and international visitors. There are very few people in the area on holidays (2.7%) or just passing through 0.1%, which shows the great strength of the event to attract visitors at this time of year.

TABLE 6: PURPOSE OF VISIT

Purpose of Visit	2011	2012	2013
<b>Live or work here</b>	14.3%	8.5%	14.4%
<b>Other</b>	0.4%	0.6%	0.1%
<b>On holidays</b>	1.3%	0.6%	2.7%
<b>For the event specifically</b>	84.1%	90.2%	82.8%
<b>Total</b>	100.0%	100.0%	100.0%

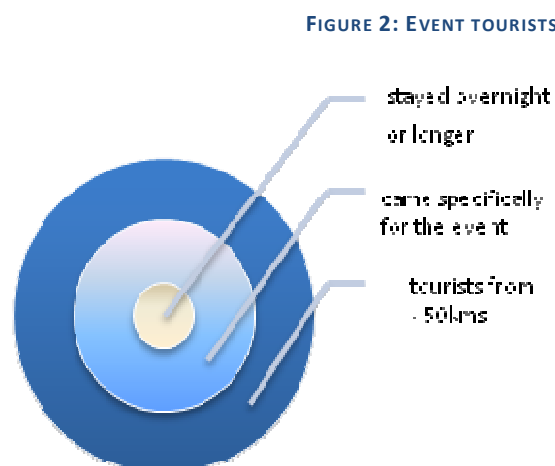
Table 7 further breaks down the purpose of visit figures according to the States and regions from which visitors are especially attracted.

TABLE 7: PURPOSE OF VISIT BY REGION

	QLD	NSW	VIC	OS	SA	WA	ACT	TAS	Total
<b>Live or work in the area</b>	6.3%	8.1%							14.4%
<b>On holidays</b>	1.0%	0.8%	0.2%	0.2%	0.1%				3.0%
<b>Passing through</b>	0.1%								0.1%
<b>For the event only</b>	52.8%	15.5%	6.6%	2.9%	1.3%	0.5%	0.5%	0.5%	82.0%
<b>Total</b>	61.8%	24.4%	6.8%	3.1%	1.4%	0.5%	0.5%	0.5%	100.0%

## EVENT TOURISM RATIO

Based on the analysis of postcodes and purpose of visit, it is estimated that **66% of visitors to the event are “event specific tourists”**- that is, they travelled into the region (from more than 50kms away), and stayed overnight or longer, with the intention of visiting the event. This ratio is used to calculate the overnight visitors in the economic calculations below.



## DIRECT VISITOR EXPENDITURE

Based on the results of the survey, the direct impact of consumer spending during the event is estimated to be approximately **\$33.3 million**. As shown below, the expenditure is calculated on visitors to the event who are bringing “new money” to the region, including both overnight visitors and day trippers who have come to the area specifically for the event (event specific visitors). It does not include visitors to the event who reside in the local region (Southern Gold Coast) as that money was assumed to exist in the local economy, nor does it include those in the region for other reasons such as holidays or business.

### AVERAGE EVENT EXPENDITURE

The average event expenditure for the duration of the event was \$613 per person however there were significant differences between the expenditure of day trippers and event tourists as follows. The overall average expenditure for event tourists continues to increase.

**TABLE 8: AVERAGE VISITOR EXPENDITURE BY TYPE**

Average per person	All visitors	Event tourists only	Day trippers
2011	\$508	\$655	\$90
2012	\$616	\$680	\$114
2013	\$613	\$777	\$107

Average expenditure includes purchases made in the area on accommodation, food, retail – including merchandise, entertainment and transport, as well as “big items” such as car parts and accessories. Where respondents have indicated they made major purchases (e.g \$20,000 on a car) these have been omitted from the calculations of average expenditure.



The estimated expenditure for overnight visitors and for day trippers is calculated as follows, using the event tourism ratio of 66% described above, and the average expenditure of overnight and day trippers shown in Table 8.

**TABLE 9: DIRECT VISITOR EXPENDITURE**

Visitor expenditure	2011	2012	2013
Unique visitors	49,413	60,840	<b>62,250*</b>
Event specific tourist %	51%	69%	<b>66%</b>
Overnight event tourist #'s	25,201	41,980	<b>41,085</b>
PP tourist spend per event	\$655	\$680	<b>\$777</b>
	\$16,506,413	\$28,546,128	<b>\$31,923,045</b>
<b>Day Visitors</b>			
unique visitors	49,413	60,840	<b>62,250</b>
Day trippers % (excludes SGC)	36%	11%	<b>20.5%</b>
Day tripper #'s	17,789	6,692	<b>12,761</b>
PP spend per event	\$90	\$114	<b>\$107</b>
	\$1,600,981	\$762,934	<b>\$1,365,454</b>
<b>Total estimated economic impact to the Southern Gold Coast region</b>	<b>\$18,107,655</b>	<b>\$29,309,062</b>	<b>\$33,288,499</b>

*\*The total attendance was estimated by QLD Police to be approximately 90,000. The 'unique visitor' figure used here allows for overnight visitors to attend on multiple days, and has been calculated using the crowd estimate figures shown in Appendix 1.*

The total visitor expenditure increased substantially each year of the event. The increase in overall economic expenditure is the result of:

1. Increased total attendance,
2. A shift from day trippers to accommodated visitors,
3. Increase in average expenditure of accommodated visitors.

## EXPENDITURE BY LOCATION

Visitors were asked to estimate the ratio of their expenditure in the two main locations of the event, and other surrounding areas. The results suggest that the majority of spending is made in the Southern Gold Coast area (77%), with the Tweed Shire receiving around 19% of visitor expenditure and other areas 4%.

**TABLE 10: EXPENDITURE BY LOCATION**

Southern Gold Coast	Tweed Shire	Other Gold Coast
77%	19%	4%
\$25,632,144	\$6,324,814	\$1,664,424

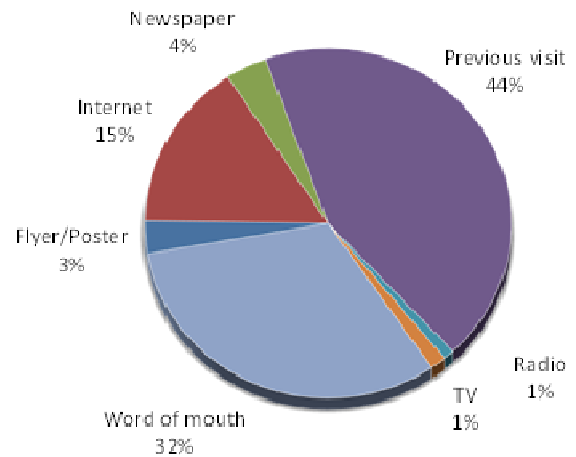
## PROMOTION ANALYSIS

Respondents were asked to identify the sources they had used to obtain information about Cooly Rocks On. As shown in Table 11, the survey results in 2013 are consistent with 2012, with 43.6% of the respondents to the 2013 survey indicating they knew about the event from a previous experience, 31.8% from Word of Mouth and 15.6% knew about the event from the internet

TABLE 11: PROMOTION ANALYSIS

	2012	2013
Previous visit	43%	44%
Word of mouth	28%	32%
Internet	19%	15%
Newspaper	3%	4%
Flyer/Poster	1%	3%
TV	1%	1%
Radio	-	1%
Walked into it	-	1%

FIGURE 3: ADVERTISING EFFECTIVENESS



## OPINIONS OF THE EVENT EXPERIENCE

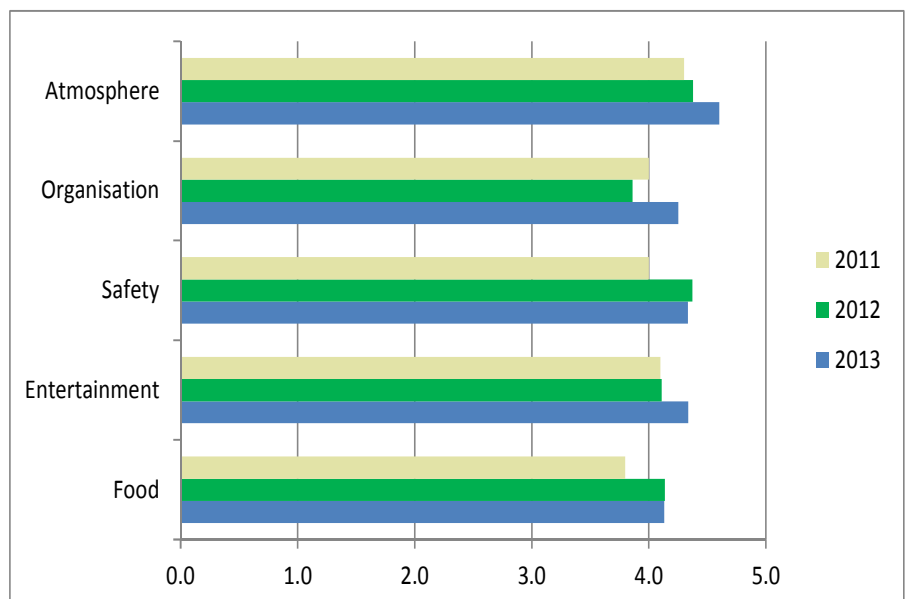
Survey respondents were asked to rate their event experience, both on a rating scale and by providing their comments in open-ended responses.

### EVENT EXPERIENCE RATINGS

Respondents were asked to rate a number of aspects from the event from 1 to 5, with 1 being 'poor' and 5 being 'excellent'.

FIGURE 4: EVENT EXPERIENCE RATING

As illustrated in Figure 4, 'atmosphere' received the highest rating of 4.5 and 'food' received the lowest average rating with 4.1. Overall, all aspects of the event rated highly, with all aspects of the event receiving a 'very good' or 'excellent' response and with most aspect rating higher than previous years.



## ASPECTS MOST ENJOYED

Respondents were asked to provide further comments on aspects they most enjoyed. A comprehensive list of over 883 comments was compiled regarding what they enjoyed most about the Cooly Rocks On. These comments were coded and themed into categories shown in Table 11. The highest response was 'cars' as the main aspect followed the 'music', 'entertainment' and 'everything', the latter category reflecting responses that listed more than 3 items 'most enjoyed'.

**TABLE 11: MOST ENJOYED COMMENTS**

Most Enjoy	2011	2012	2013
<b>Cars</b>	26.2%	25.0%	30.2%
<b>Music</b>	21.6%	12.3%	19.1%
<b>Everything</b>	11.6%	21.2%	15.0%
<b>Venue</b>	9.0%	2.2%	1%
<b>Atmosphere</b>	8.6%	11.9%	11%
<b>People</b>	7.3%	7.0%	3.7%
<b>Entertainment</b>	6.6%	8.5%	13.3%
<b>Dancing</b>	5.0%	3.6%	5.3%
<b>Markets</b>	4.0%	2.4%	1.1%

Several respondents noted that the weather made it difficult for them to fully enjoy all aspects of the event although many of these were grateful for the entertainment provided by the clubs and hotels. A full list of all comments is provided in Appendix 2.

## SUGGESTIONS FOR IMPROVEMENTS

Overall Cooly Rocks On received very positive feedback with 13.7% of the respondents stating no change was required. Most suggestions for improvement for the event were related to the entertainment with 17.4% of the respondents making suggestions regarding the type of entertainment they would like to see at future events. A further 13% of the respondents suggested changes to programming or scheduling, with suggestions mostly related to changing aspects of the parade or entry and display of cars and cruise times - similar to comments and feedback made in previous years.

**TABLE 12 – SUGGESTIONS FOR IMPROVEMENT**

Improvements	2011	2012	2013
<b>Nothing</b>	24.4%	9.8%	13.7%
<b>Entertainment</b>	18.8%	12.9%	17.4%
<b>Weather</b>	15.9%	17.2%	10.9%
<b>Facilities</b>	9.7%	10.2%	14.3%
<b>Parking</b>	9.1%	6.2%	7.9%
<b>Other</b>	6.8%	8.0%	6.6%
<b>Program/scheduling</b>	5.1%	19.1%	13.0%
<b>Advertising/signage/information</b>	6.8%	8.3%	6.9%
<b>Entry fee</b>	1.7%	1.2%	2.2%
<b>Food</b>	1.7%	0.4%	2.0%
<b>Merchandise</b>	N/A	4.3%	2.2%
<b>Security</b>	-	-	2.5%

Fewer people made comment about the weather in 2013 (10.9%) although suggestions were made weather-proofing the event or perhaps changing the dates. A new category emerged in the research in 2013 with suggestions relating to security, which was consistent with media reports on the event.

## *CONCLUSIONS AND RECOMMENDATIONS*

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The results from the visitor research suggest that Cooly Rocks On is a signature event for Coolangatta, attracting over 60,000 visitors from many regions to the area. Visitors are attracted to the event from interstate and overseas, with an increase in interest from New Zealand and the USA. They are attracted by the atmosphere and the nostalgic experience that the event can engender, and by the opportunities to spend time with like-minded people from the same era.

The results from the surveys suggest that the event generated more than \$33 million in direct visitor expenditure, the majority of which is made in the Southern Gold Coast area (77%), with the Tweed receiving around 19% of visitor expenditure and other areas 4%. Consistent with the research of 2012, the increase in visitor expenditure can be attributed to a larger proportion of visitors staying overnight or longer, with many visitors stay for the week of celebrations and entertainment - as opposed to coming for a day trip. The ability to keep visitors in the area for this amount of time is not achieved by many events in Australia, and is an achieved through attention to programming and to tending to the needs of the special groups of enthusiasts and fanatics.

The results indicate that the audience were again highly satisfied with most aspects of the event, including the unique mix of cars, dancing and music in the atmosphere of Coolangatta. This has led to strong repeat visitation with repeat visitors (43%) and word of mouth (31%) accounting for much of the ways in which people found out about this year's event. This form of promotion suits the age group of the audience, with less acceptance of social media and internet technologies.

Nonetheless, numerous recommendations were put forward by passionate participants as suggestions for improvement which have the ability to improve the accessibility and appeal of Cooly Rocks On including changes to entertainment and facilities such as toilets and dance floors. Attention to these aspects - as well as recognition of their contribution, will continue to develop the relationship with the audience.