

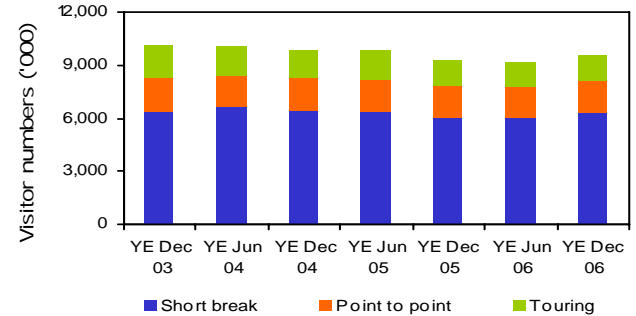
# Drive Market Snapshot

## Year ended December 2006

### Domestic Drive Market

Source: National Visitor Survey, Tourism Research Australia.

### What types of drive holiday are taken in QLD?



- In 2006, 67% of all drive market trips to QLD were short breaks of 1 to 3 nights (6.4 million trips). 19% of all trips were point to point (1.8 million), while domestic visitors took 1.4 million trips of 4 or more nights, making 2 or more stopovers (i.e., were touring QLD).
- Comparing 2005 and 2006, approximately 290,000 more short break drive market holidays were taken in QLD.
- There has been an average annual decline of 8.2% in the touring market to QLD between 2003 and 2006.

	Visitors		Nights	
	Growth (05-06)	Trend (03-06)	Growth (05-06)	Trend (03-06)
<b>QLD</b>				
Short Break	4.8%	0.1%	3.8%	0.1%
Point to Point	0.1%	-3.6%	-2.4%	-7.4%
Touring Market	-5.2%	-8.2%	0.9%	-8.3%
<b>Total Drive Market</b>	<b>2.3%</b>	<b>-2.0%</b>	<b>0.5%</b>	<b>-5.7%</b>

**Australian Drive Market**  
**45,784,000 Visitors, 164,344,000 Visitor Nights**  
 62% of total Visitors to Australia  
 58% of total Visitor Nights in Australia

**Queensland 21%**  
 Visitors  
 9,516,000 (-2.0%)  
 Visitor Nights  
 36,605,000 (-5.7%)  
 ALOS\* 3.8 nights

**NSW 36%**  
 Visitors  
 16,335,000 (-1.7%)  
 Visitor Nights  
 57,112,000 (-0.5%)  
 ALOS\* 3.5 nights

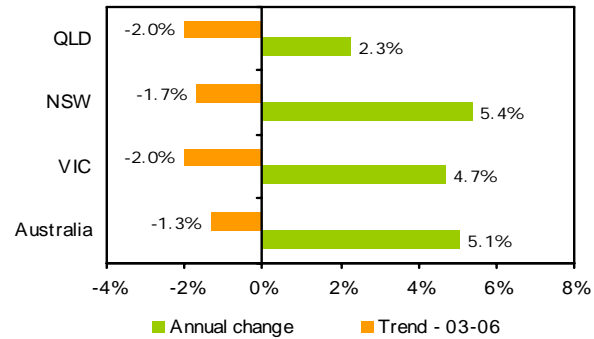
**Victoria 25%**  
 Visitors  
 11,494,000 (-2.0%)  
 Visitor Nights  
 33,841,000 (-1.6%)  
 ALOS\* 2.9 nights

**Other Australia 22%**  
 Visitors  
 9,933,000 (-0.1%)  
 Visitor Nights  
 36,786,000 (-1.3%)  
 ALOS\* 3.7 nights

NB: Growth refers to average annual change between YE Dec 2003 and YE Dec 2006.  
 ALOS – Average length of stay (nights).

- The domestic drive market declined at an average annual rate of 1.3% between 2003 and 2006, with the greatest declines occurring in Queensland and Victoria (588,000 fewer visitors and 727,000 fewer visitors respectively). NSW recorded an average annual decline in visitor numbers of 1.7% over the same period (equating to an overall decrease of 868,000 visitors).
- Queensland claimed 20.8% of the total domestic drive market for the year ended December 2006. QLD's share of the domestic drive market has remained relatively stable over the last three years, having declined by -0.4 percentage points since 2003. NSW also experienced a fall of -0.4 percentage points over the same period and held a market share of 35.7% for the year ended December 2006.
- The average length of stay of drive market visitors in QLD fell to 3.8 nights in 2006 – this is a drop of 0.1 nights from 2005.
- Despite a declining trend over the three years from December 2003 to December 2006, there has been positive growth in both the intrastate and interstate drive markets over the past year.
- In the last year, there was an increase of 6.3% in the number of drive visitors staying 1 night in QLD, but a marginal decrease of 0.9% for those staying from 4 to 7 nights.

### Change in drive visitor numbers



# Drive Market Snapshot

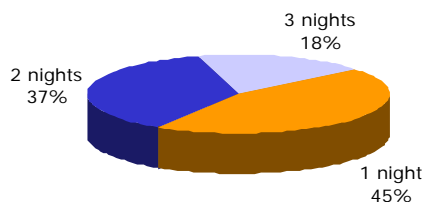
Year ended December 2006

## Domestic Short Break Market

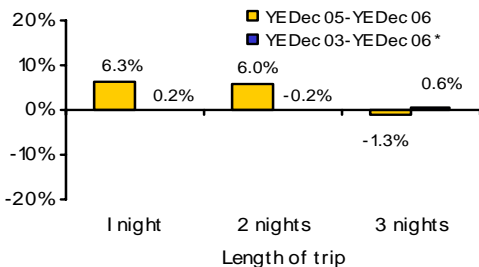
Source: National Visitor Survey, Tourism Research Australia.

- 6,356,000 visitors to QLD, spending 10,889,000 nights (1.7 nights on average per person).

### Length of trip



### Percent change in visitor numbers



\* Average annual growth rate

### Who are they?

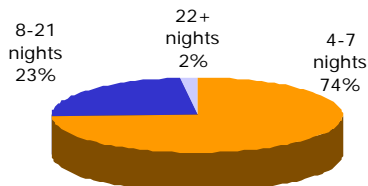
- Aged 25-44 years (38%)
- Travel party - Adult couples (35%)
- From regional QLD (excluding Brisbane, 51%)
- Travel in the early to mid-year (June quarter, 28%)

## Domestic Point to Point Market

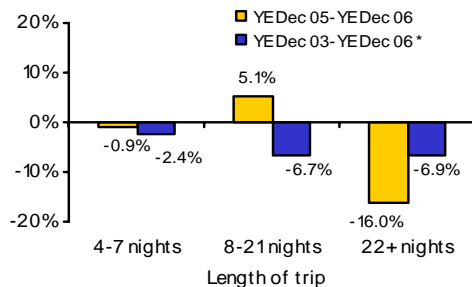
Source: National Visitor Survey, Tourism Research Australia.

- 1,762,000 visitors to QLD, spending 13,154,000 nights (7.5 nights on average per person).

### Length of trip



### Percent change in visitor numbers



\* Average annual growth rate

### Who are they?

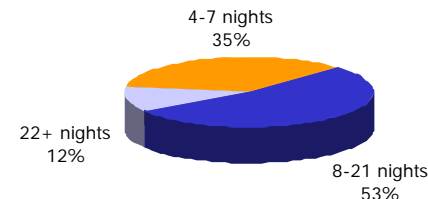
- Aged 25-44 years (34%)
- Travel party - Family groups (parents with children, 37%)
- From regional QLD (excluding Brisbane, 45%)
- Travel later in the year (December quarter, 31%)

## Domestic Touring Market

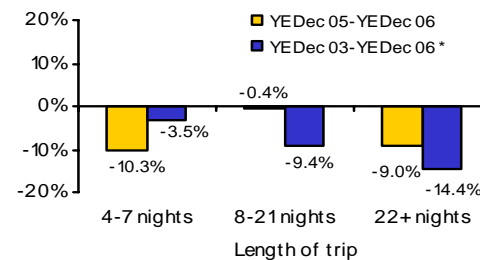
Source: National Visitor Survey, Tourism Research Australia.

- 1,398,000 visitors to QLD, spending 12,562,000 nights (9.0 nights on average per person).

### Length of trip



### Percent change in visitor numbers



\* Average annual growth rate

### Who are they?

- Aged 45-64 years (39%)
- Travel party - Adult couples (42%)
- From NSW (35%)
- Travel mid to late year (September quarter, 29%)

# Drive Market Snapshot

Year ended December 2006

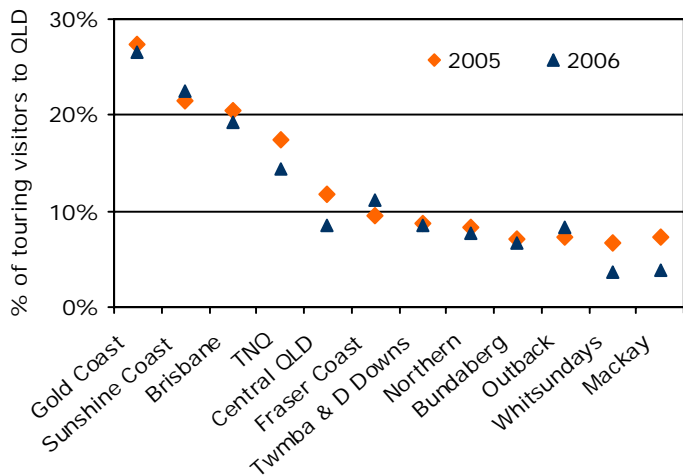
## Who is the self-classified\* domestic touring visitor to Queensland?

Source: Roy Morgan Research, Holiday Tracking Survey.

\* *Holidaymakers / those on business who agreed that on their last long trip of 3+ nights they "toured around by car and discovered things at their own pace".*

- There were 539,000 such visitors to Queensland in the last year (29% share of Australian market), representing 23% of all visitors to the state.
- The touring market to Queensland decreased in size by 4.3% in the 12 months to December 2006.

## Where did they go in Queensland?



- Touring visitors were more likely than the average visitor to Queensland to visit the Sunshine Coast, Brisbane, TNQ, Central QLD, Fraser Coast, Darling Downs, Bundaberg, Townsville, Outback, Whitsundays and Mackay regions.
- Between 2005 and 2006, the Outback, the Fraser Coast region and the Sunshine Coast all experienced increases in the number of touring visitors, while all other regions saw a decline in the number of touring visitors.

## Touring Visitor Profile

Typically, touring visitors to Queensland:

- Were from QLD (37%) and NSW (29%)
- Were aged 50-64 years (33%)
- Were mid-life households (37%)
- Had an annual household income of \$130,000 or more (13%)
- Travelled as a couple (48%)
- Travelled during June, July and October
- Stayed in the state for 8-14 nights (31%)

- Spent \$2,580 on average on last their trip
- Sought information from the internet (29%) in choosing their destination, as well as from friends/relatives (21%).
- Stayed at a friend or relative's home (38%), in a hotel or motel (38%), or in rented accommodation (29%)
- Travelled by own car/4WD (57%), and/or by air (37%)

Between the year ended December 2005 and the year ended December 2006, there was an increase in the number of touring visitors to QLD who:

- were aged 18-24 years (↑ 64%)
- were from NSW (↑ 2%)
- were young singles (↑ 18%)
- earn \$130,000 or more/year (↑ 24%)
- stayed in the state between 8 to 14 nights (↑ 13%)
- stayed in rented accommodation (↑ 20%) or a hotel/motel (↑ 11%)
- travelled by train (↑ 57%)
- The total average cost of a trip to QLD decreased by approximately \$45 over the year (↓ 2%).

	Touring visitors to QLD	All visitors to QLD
<b>Age</b>	50-64 years (33%)	35-49 (32%)
<b>Origin</b>	Queensland (37%)	Queensland (41%)
<b>Lifecycle</b>	Mid-life households (37%)	Mid-life households (29%)
<b>Household income</b>	\$130,000 or more (13%)	\$130,000 or more (13%)
<b>Travel party</b>	Couple (48%)	With a partner/as a couple (33%)
<b>Seasonality</b>	July (12%)	December (11%)
<b>Length of trip (nights)</b>	8-14 nights (31%)	8-14 nights (29%)
<b>Average cost of trip</b>	\$2,580	\$2,454
<b>Accommodation</b>	Hotel/motel (38%) Friend/relative (38%)	Friend/relative's home (37%)
<b>Transport</b>	Own car/4WD (57%)	Own car/4WD (45%)

## Self-Classified Domestic Touring Visitors to QLD – Market Segments

Source: Roy Morgan Research, Holiday Tracking Survey.

### Fly/Drive

Last long trip travelled by air, and own car/4WD OR friend/relative's car/4WD OR hire car/4WD.

- 160,000 visitors (30% of total touring market). 39% were on their trip for 8-14 nights
- Were mainly from NSW (28%)
- The size of this market has grown at an average rate of 10.7% each year from December 2003.

#### Popular QLD Destinations

Brisbane	29%
Gold Coast	27%
Sunshine Coast	26%
TNQ	23%
Fraser Coast	10%

### Accommodated Touring

Last long trip travelled by own car/4WD OR friend/relative's car/4WD OR hire car/4WD, AND stayed in commercial accommodation.

- 192,000 visitors (36% of total touring market). 30% were on their trip for 8-14 nights
- Were mainly from Queensland (52%)
- The size of this market has decreased at an average rate of 9.8% each year from December 2003.

#### Popular QLD Destinations

Gold Coast	28%
Sunshine Coast	23%
Brisbane	14%
Fraser Coast	14%
Outback	12%

### Caravan/Camping

Last long trip stayed in commercial accommodation, AND used a caravan OR a tent as accommodation.

- 84,000 visitors (16% of total touring market). 15% were on their trip for 8-14 nights
- Were mainly from Queensland (40%)
- The size of this market has decreased at an average rate of 9.1% each year from December 2003.

#### Popular QLD Destinations

Outback	27%
Toowoomba	20%
Central QLD	19%
Gold Coast	18%
TNQ	16%

### 4WD Enthusiasts

Last long trip travelled by own car/4WD OR friend/relative's car/4WD OR hire car/4WD, AND read Australian 4WD Monthly OR Overlander 4WD OR 4x4 Australia.

- 53,000 visitors (10% of total touring market). 19% were on their trip for 8-14 nights
- Were mainly from Queensland (56%).

#### Popular QLD Destinations

TNQ	18%
Gold Coast	15%
Sunshine Coast	11%

• Data for 2002 unavailable.  
Sample size restricted list of top QLD destinations.

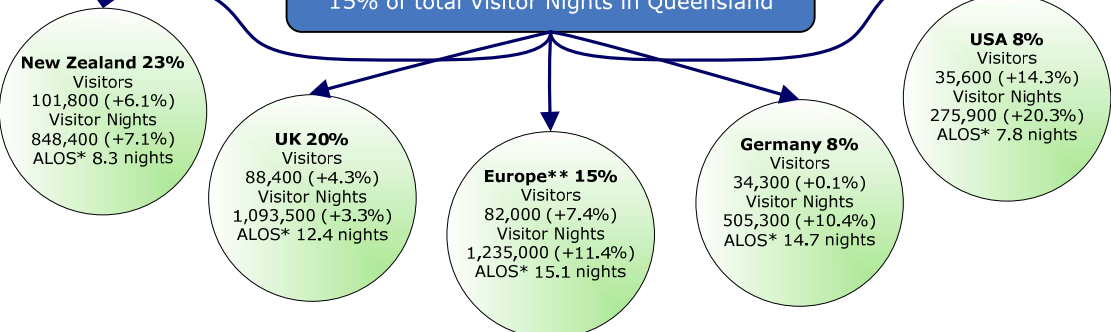
# Drive Market Snapshot

Year ended December 2006

## International Drive Market

Source: International Visitor Survey, Tourism Research Australia.

**Queensland Drive Market**  
**448,700 Visitors, 5,028,700 Visitor Nights**  
 21% of total Visitors to Queensland  
 15% of total Visitor Nights in Queensland



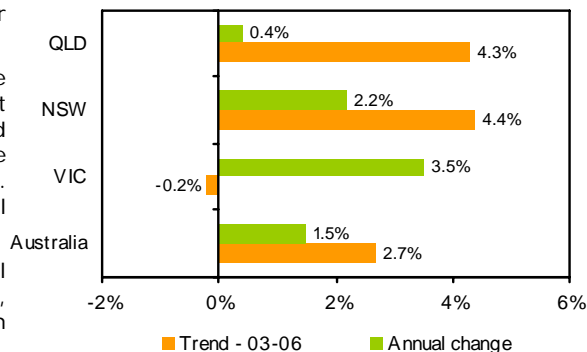
NB: Growth refers to average annual change between YE Dec 2003 and YE Dec 2006.

\* See Appendix for definitions of international drive visitor.

\*\* Excludes the United Kingdom and Germany.

- In 2006, there were 448,700 international drive market visitors to QLD (21% of all inbound visitors to the state). On average, each visitor spent 11.2 nights in QLD.
- Over the last three years, the size of the international drive market to QLD has grown at an average annual rate of 4.3%. This is second only to NSW, which has experienced an average annual growth of 4.4% over the last three years. In comparison, Victoria has exhibited a marginal decline of 0.2%.
- QLD holds the largest share of the total international drive market to Australia (42%), this is an increase of 1.8% in market share from the year ended December 2003.
- 37% of all drive market visitors to the country visited NSW and 26% visited VIC.

### Change in visitor numbers



## Where do international drive market visitors go in Queensland?

### New Zealand visitors

Brisbane	42%
Gold Coast	39%
Sunshine Coast	33%
TNQ	11%
Fitzroy	7%

### United Kingdom visitors

Brisbane	44%
TNQ	36%
Sunshine Coast	31%
Gold Coast	29%
Fraser Coast Sth Burnett	27%

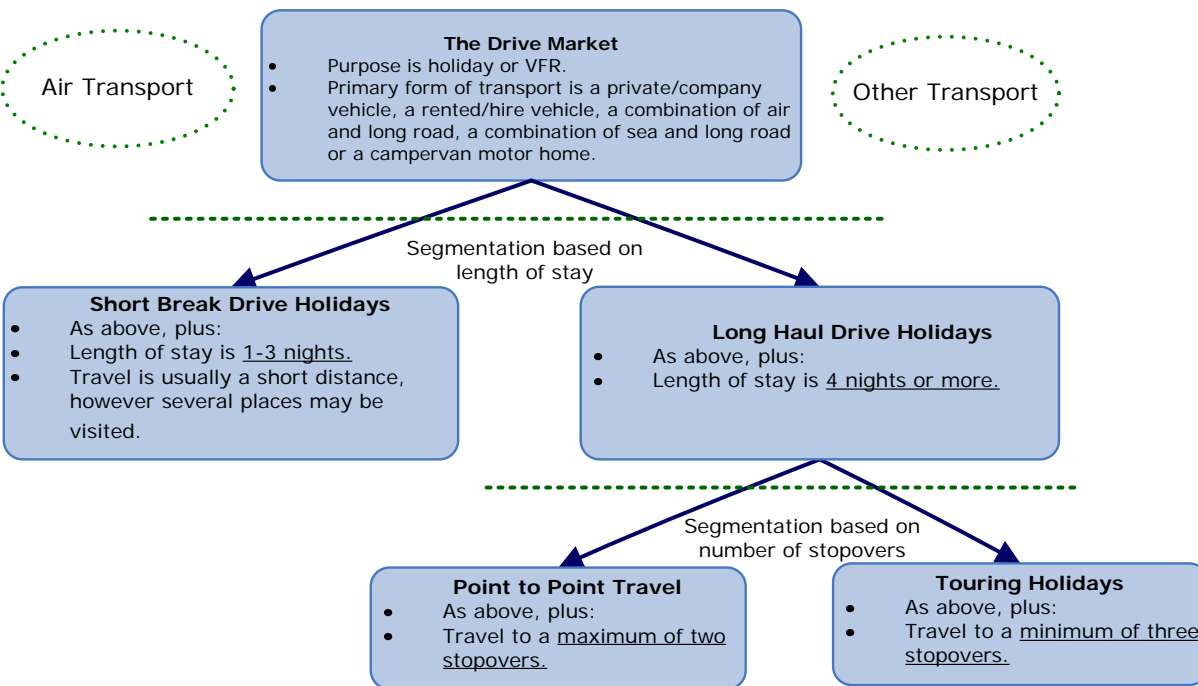
### European visitors

TNQ	49%
Brisbane	40%
Fraser Coast Sth Burnett	34%
Whitsundays	32%
Gold Coast	27%

## Who is the typical international drive market visitor to Queensland?

- Aged 25 to 44 years (39%)
- Travelling alone (43%)
- Stayed in a hotel, motel, resort or motor inn (46%) or at the home of a friend or relative (30%).
- Travelled late in the year (September quarter 28%, December quarter 30%)
- Enjoyed dining out, shopping, going to the beach and visiting national parks and State parks while in Australia.

## APPENDIX 1 – Segmentation of the Domestic and International Drive Markets



### Data Sources:

The **National Visitor Survey (NVS)** is managed by Tourism Research Australia (TRA). Approximately 80,000 Australian residents aged 14 and over comprise the annual national sample.

The **International Visitor Survey (IVS)** is conducted by Newton Wayman Chong Research on behalf of TRA. IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures data and does not include persons aged under 15 years.

Roy Morgan Research's **Holiday Tracking Survey (HTS)** has two components: a face to face interview and a self-completion survey. Surveys are conducted continuously throughout the year. Only one person aged 14 years and over is interviewed per dwelling. Approximately 25,000 questionnaires are processed in each 12 month period, and are weighted by age, sex and area to be representative of the Australian population.

### For Further Information:

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## International Drive Market

- Those on holiday or visiting friends and relatives.
- Main form of transport between stopovers: private or company car; rental car; a self-drive van, motor home or campervan; or a 4WD vehicle.