

Road Travellers Study

Research Report
Prepared for
Tourism Queensland



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■ Background	2
■ Research Objectives	3
■ Research Methodology	4
■ Learnings from the focus groups	5
■ Quantitative Study - Main Findings	12
● Sample Demographics	13
● Details of the last road trip undertaken	18
● Information sources	32
● Rest Areas	46
● Attitudes to travel	51
■ Summary and Conclusions	57

- The tourist market in Queensland is more likely to access the State via its road network than any other form of transport. Approximately 90% of all tourist movement in Queensland is accounted for by road transport. To maximise the effective use of the road system, a need has been identified to ensure that travellers have access to appropriate information prior to and during their journey.
- The Queensland Department of Main Roads is in the process of examining a system of road signage, establishing rest areas and stopping places and ensuring effective traffic flow across Queensland.
- The plan is to develop an effective and comprehensive Integrated Information Network that provides the tourist with appropriate and effective direction and information while not compromising the safety of all road users.
- In order to establish this information network, Tourism Queensland needs to understand the preferences shown by travellers regarding road usage. This information will then be used to direct Main Roads in their distribution of road traveller information in Queensland.
- This report details the findings to emerge from primary research conducted to ascertain such preferences and information needs from road travellers in Queensland.

The purpose of the research was to identify the means by which road travellers seek to receive information while travelling within Queensland.

- With specific research objectives to:
 - Identify road travellers preferences in terms of how information is distributed to them;
 - Identify road travellers preferences for the location of information bays;
 - Measure traveller interest in an integrated information system;
 - Identify the types and levels of information road travellers would like to see at information bays;
 - Identify road travellers preferences for the presentation of information;
 - Measure traveller perceptions of themed routes;
 - Identify where the travel experience would be enhanced if standardised visitor symbols were adopted throughout the State;
 - Measure the extent to which the provision of this information influences visitor expenditure, length of stay and the participation of more activities.

Two phases of research were conducted :

■ Phase 1

- 2 focus groups with people who had travelled on major routes in Queensland over the past 12 months. These routes encompassed the Bruce Highway, Brisbane to Mt Isa and Mt Isa to Townsville.
- 1 group was conducted in Brisbane (3rd November 1999) and 1 group in Sydney (9 November 1999).
- Respondents included a mix of gender and lifestage including older households and families.
- It was initially intended to sample from a list of those who had contacted Tourism Queensland for the Queensland Motoring Guide, however, due to the logistics of meeting in a central location on one evening, the list was supplemented by our qualitative database.

■ Phase 2

- 313 telephone interviews with people who had travelled on the same major routes in Queensland over the past 12 months.
- 102 in Queensland, 111 in New South Wales and 100 in Victoria.
- The primary source of respondents was people who had contacted Tourism Queensland for the Queensland Motoring Guide (with 10% incidence achieved).
- Interviewing was completed between 18th and 28th November 1999.

Learnings from the focus groups

Learnings from the focus groups

Due to the phased nature of the research, it is relevant to consider results from the focus groups prior to examining the quantitative findings and then integrate learnings from each source. The main findings from the focus groups are summarised in the next few pages.

- There are three broad types of road traveller:
 - Those who travel from A to B in the shortest time, with minimum stops made on way;
 - Those who travel from A to B, and enjoy stopping on the way;
 - Those who travel in a general direction, taking their time and stopping constantly.

“We didn’t plan a thing, we just went. We got side tracked a few times and didn’t organise anything and it was one of the best trips we had.” (Brisbane respondent)

- Prior to travelling, all groups of people are highly likely to access information pertaining to their trip. This can include:
 - Maps/guides such as BP, RACQ, RACV, NRMA;
 - Information from Tourism Queensland (‘Queensland Government Travel Centre’);
 - Word of mouth;
 - The Internet (for a few core users).

Learnings from the focus groups (cont'd)

- Information accessed during the trip includes:
 - Brochures/information from accommodation stops;
 - Local tourist information centres;
 - Word of mouth;
 - There is certainly no shortage of information available for travellers in Queensland.

“We have maps from RACQ which we use before we go and whenever we get to a town we get a map from the local information centre. Quite often you have something planned and when you get there it’s not so great, so we always ask their advice as well.” (Brisbane respondent)

“There is tourist information at every place that you stop. There was that little ‘l’ for the tourist information, even the little hick towns that we went through have information.” (Sydney respondent)

“They are the experts, they have all the information in one spot and let you know the best places to stop.” (Sydney respondent)

“Most of the things you get in brochures are touristy things. Sometimes you are not seeing the real thing. I like to get off the road and meet the real people.” (Brisbane respondent)

Learnings from the focus groups (cont'd)

- Although Queensland is recognised as ‘the tourist state’ there is some criticism regarding signage on Queensland roads:
 - It often comes too late to make the turning;
 - It is rather old and deteriorated;
 - Held as an example of good tourism signage is Victoria which is highly praised for its road signage.

- People do acknowledge information at roadside rest areas however, this provides:
 - Something to read while stopped, and
 - Is rarely followed through by action.

“If you’re stopping for fuel or something to eat, that is when you have a look around.”
(Brisbane respondent)

“I think you are inclined to drive past these signs, normally you are going at a fair leg anyway and you just don’t want to stop.” (Brisbane respondent)

“You know that there are great distances between the places that you want to see and really you don’t deviate that much.” (Sydney respondent)

“I don’t deliberately go up to them all the time, but I do sometimes. I don’t plan by them but if you stop and they are there I will have a look. But you wouldn’t stop just for that.” (Brisbane respondent)

Learnings from the focus groups (cont'd)

- There is an overall preference for manned information centres. People feel comfortable having personal interaction with a 'local' who knows the area. It is all about personal recommendation, the chance to find out 'little known treasures' and cut through the promotional literature.

"It's a different perspective when someone is telling you and they come from the local area." (Brisbane respondent)

- For static information boards to work, there is a preference for them to be located near to towns rather than 'in the middle of nowhere'. There is little incentive to stop along the road, unless the need arises, however, most people will seek out information once they arrive in a populated area.
- One place where information boards really come into their own is at national parks. Here their offering is different to highway driving. People are expecting to receive information about the national park and the walking tracks available, therefore this type of information board offers true 'off the beaten track' experiences.

Learnings from the focus groups (cont'd)

- Respondents in the focus groups were shown an example of the themed road system currently operating in the Northern Territory. Reaction to this concept was extremely positive amongst all age, gender and lifestage groups.
- Both the concept and practical application of themed routes is well received:
 - They allow some degree of pre-planning;
 - Mixed with some degree of adventure and exploration;
 - Therefore catering for different needs from a road holiday;

“My sister would plan the whole trip before she left...I would wake up on the morning and say this looks interesting, let’s go there.” (Brisbane respondent)

- There is safety in the familiarity of a themed route and an expectation of high quality;

“At the moment it’s very haphazard, you may stop at a restaurant or service station and there is nothing there. With this at least you know where the information is and whether it interests you or not.” (Brisbane respondent)

Learnings from the focus groups (cont'd)

- Furthermore, they provide a purposeful reason to stop, break up the journey and enjoy the local environment;

“If I am cruising along and I have a big space between places then I see an information place with the symbol and there is nothing to do then I will stop and check it out.”

“I would like to get that (brochure) before I left and plan where to stop.” (Sydney respondents)

- The information format was well received:

“I think it’s fantastic. It’s clear to follow, attractive and it has all the relevant information.”

“My wife would like that, she does the navigating.”

(Brisbane respondents)

- In terms of format preference, travellers are looking for a good mix of pictorial and text information. The maps themselves should be of adequate size, clearly marked and show the distance between points of significance (including between towns and information sites).

“They should have consistent symbols on them showing birds, trees, knife and fork, information, so you have an idea what is available at each place.”

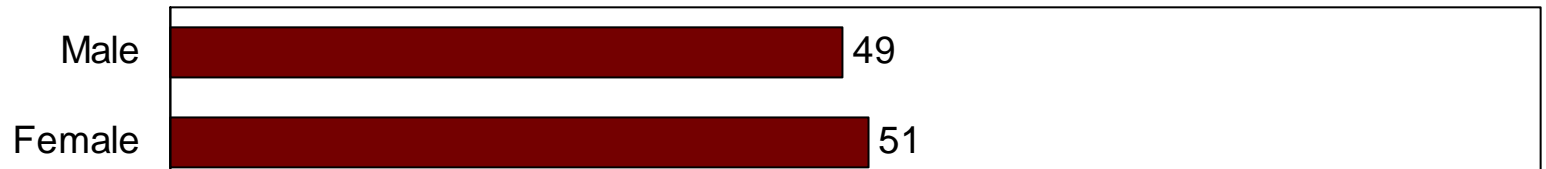
(Brisbane respondent)

Quantitative Study - Main Findings

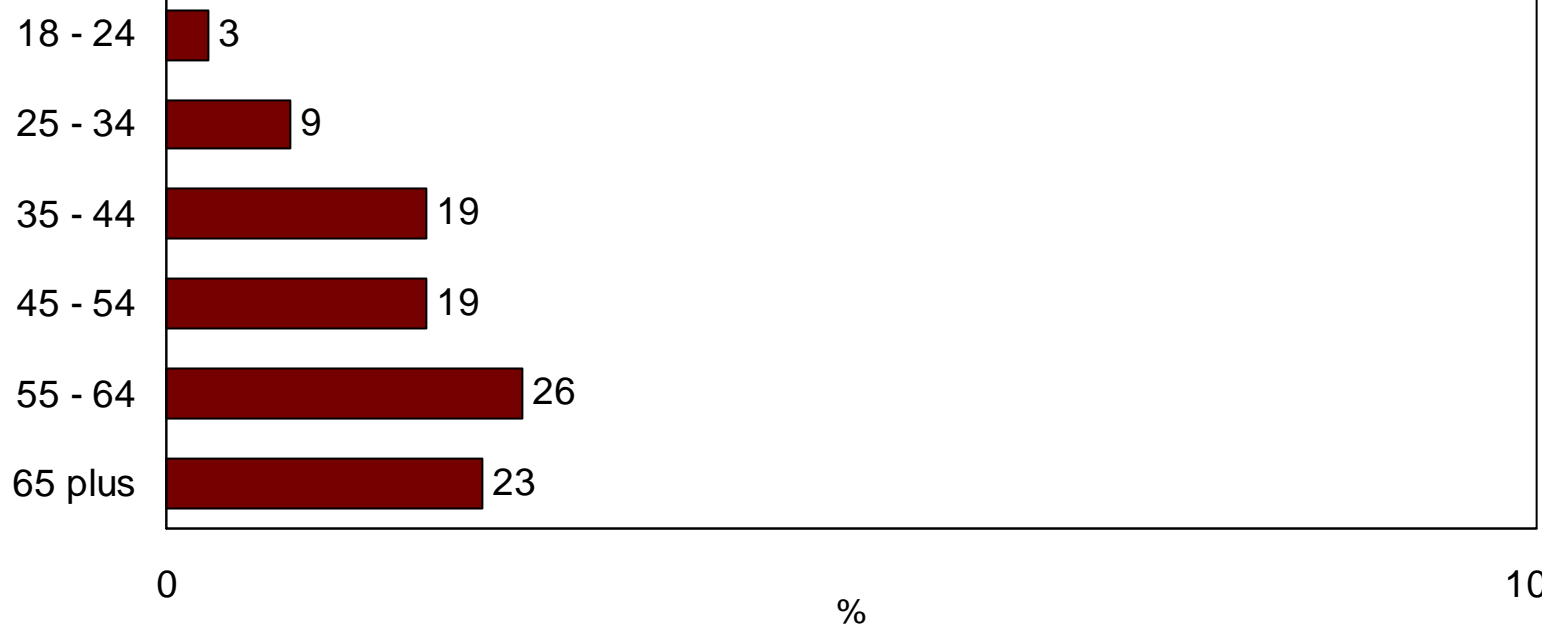
Sample Demographics

- The sample of road travellers who have requested a Queensland Motoring Guide and who have travelled on one of the major roads in Queensland over the past 12 months is skewed towards those aged over 35. Almost nine in ten fall into this age group with half being aged over 55.
- Corresponding to this, the largest group of travellers live within 'empty nester' households (49% of the sample). Followed by 'middle families' with school aged children (18%) and 'later families' with older children still at home (11%).
- There is a split between those who are in retirement (40%) and those in paid employment (43%).
- In terms of geography, those from Victoria are more likely to fall within the middle family bracket while those in New South Wales are more likely to be empty nesters.

Gender

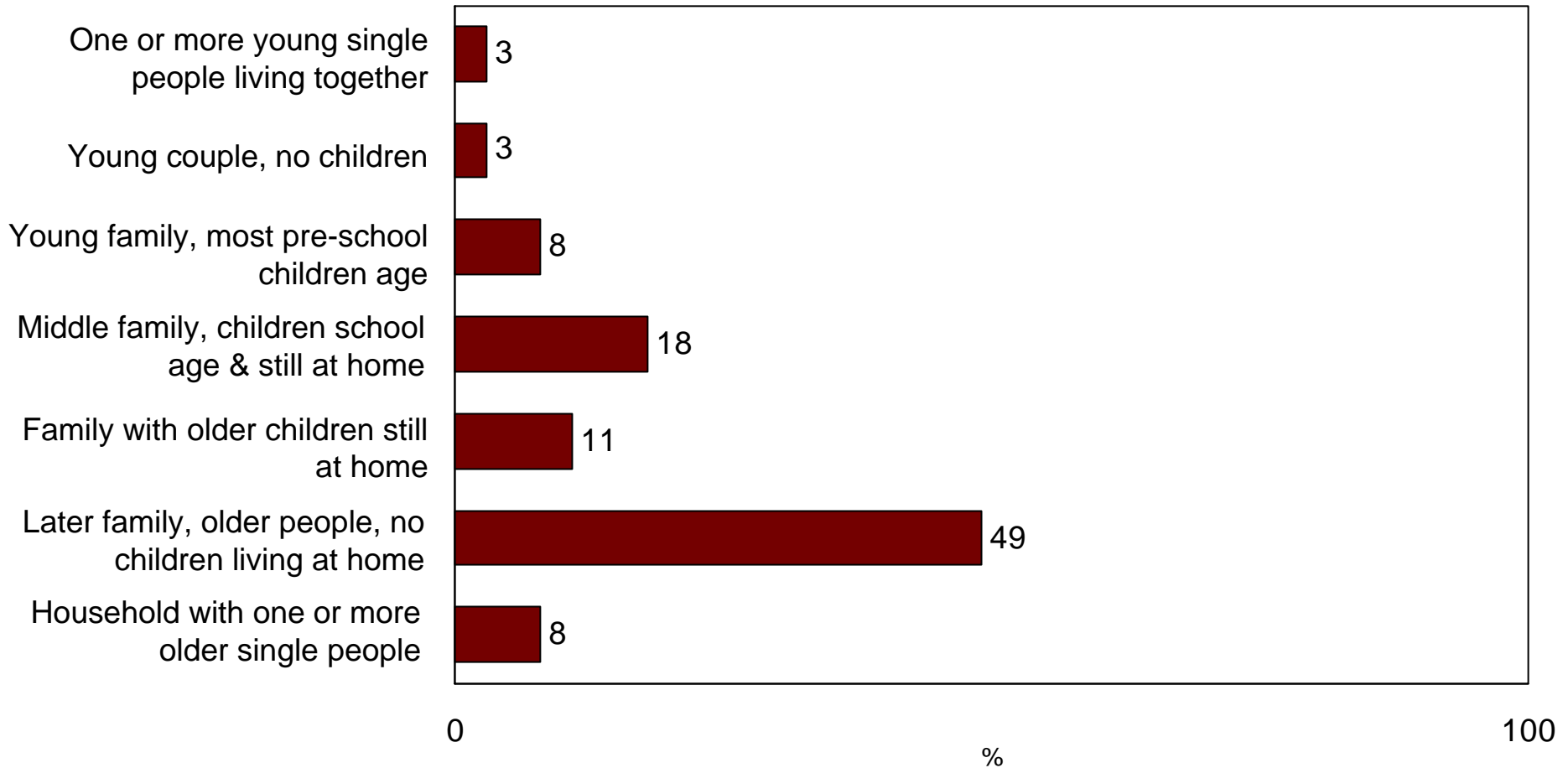


Age



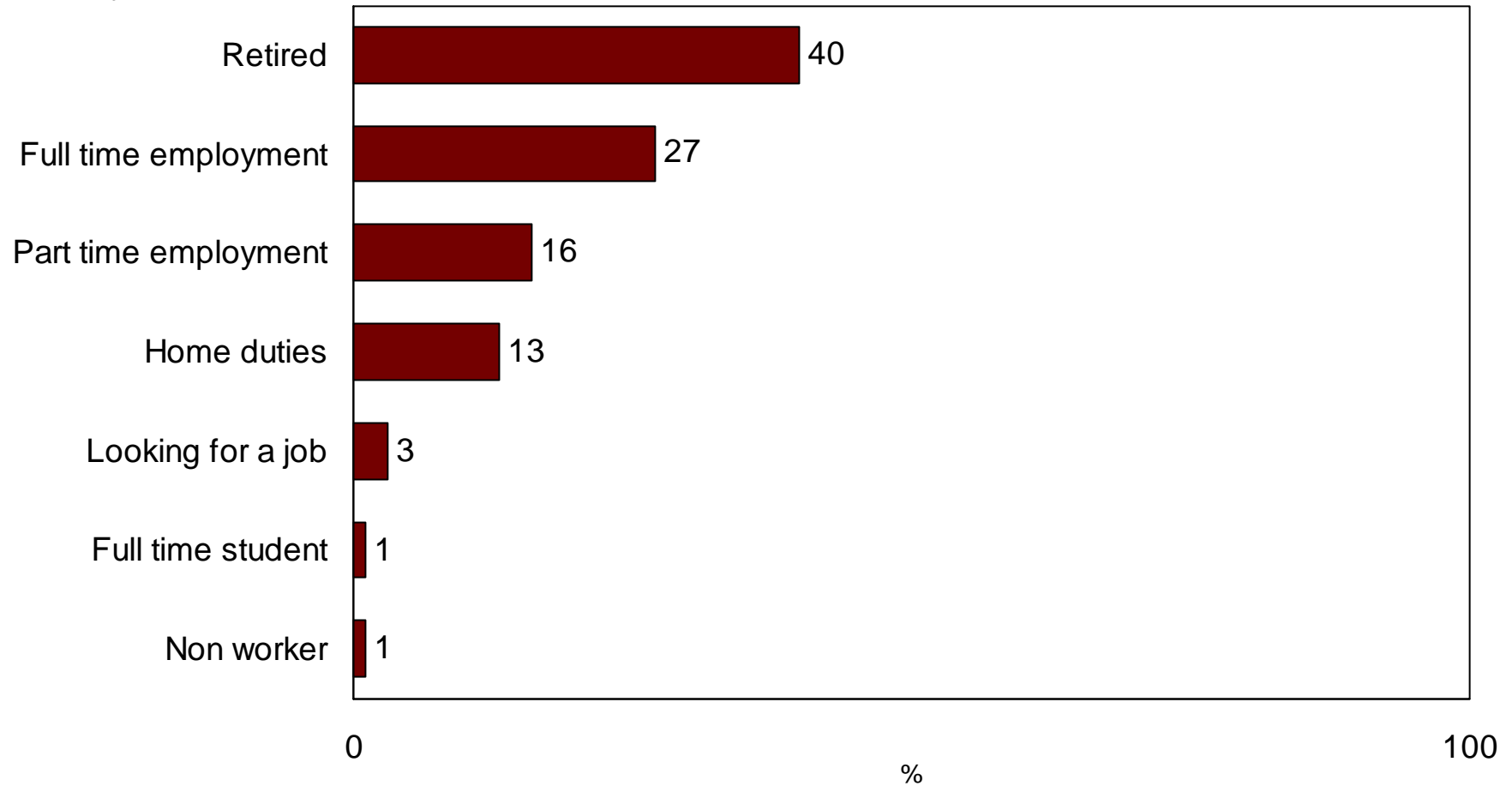
Base: Total sample (n=313)

Household structure



Base: Total sample (n=313)

Employment status



Base: Total sample (n=313)

Details of the last road trip undertaken

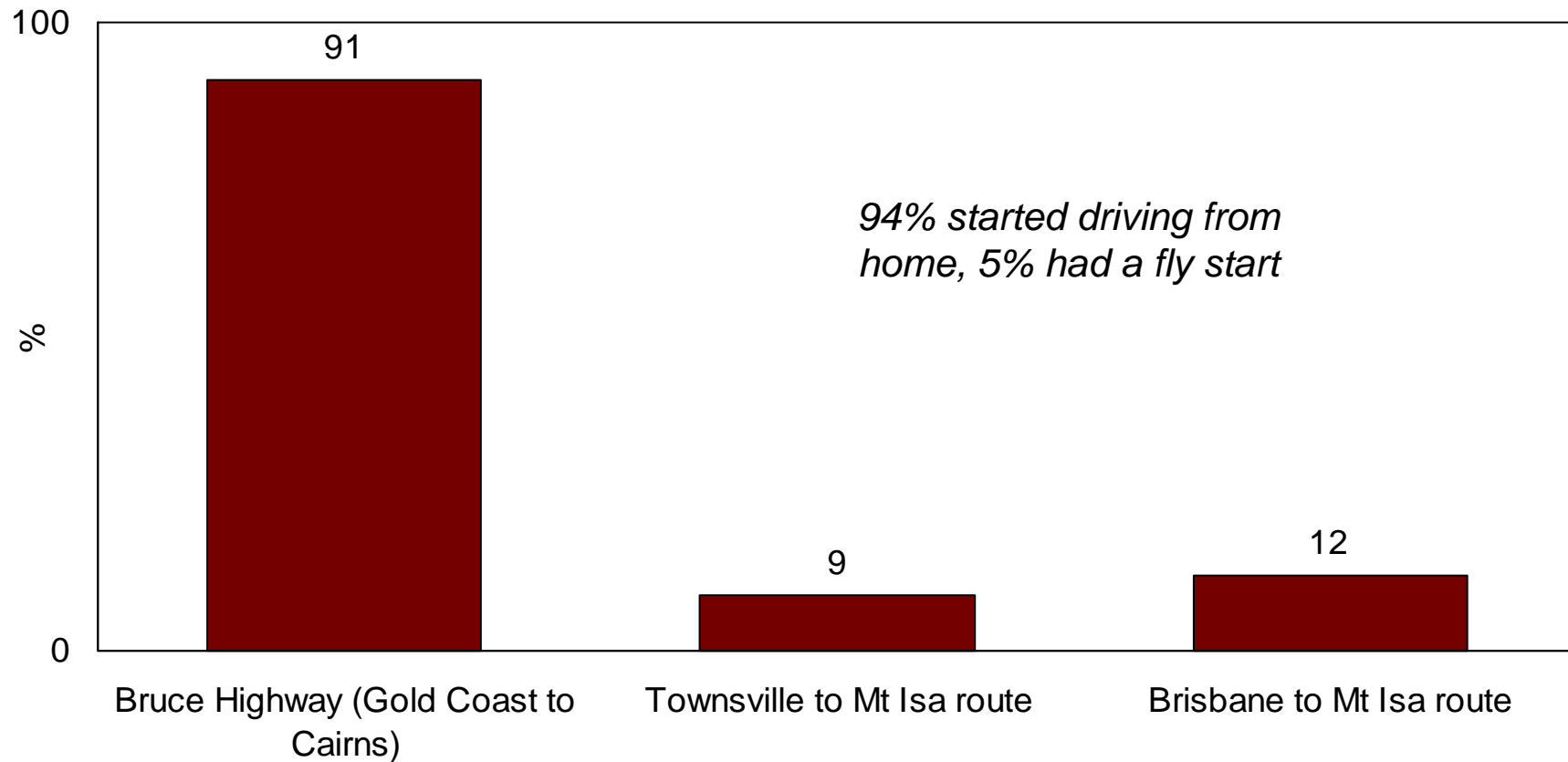
- Nine in ten of our sample had last travelled on the Bruce Highway while around one in ten had travelled either from Brisbane to Mt Isa or Mt Isa to Townsville. Travellers from Brisbane were slightly more likely to have travelled on the Brisbane to Mt Isa road (16% compared to 12% overall).
- Both roads to Mt Isa are more likely to be used by older adults, in particular those aged over 55, rather than families.
- Almost all travellers commence their journey from home and the most common party compositions are couples (56%) followed by families (24%).
- The length of trip varies greatly by State. 62% of Queenslanders take a trip of less than 10 days while the most frequently mentioned duration for Victorians is 11-15 days. There is a significant number of travellers undertaking more substantial journeys with 51% of New South Wales travellers driving for more than 21 days, as do 39% of Victorian travellers.
- Similarly, those travelling on roads other than the Bruce Highway are more likely to spend a longer time on the road, in particular on the road between Townsville and Mt Isa.
- The three types of traveller identified in the focus groups have now been quantified. By far the largest segment is those who 'meander' along the road, stopping off where they please (54%), followed by those who stop merely to break the journey (37%).

- The type of travel undertaken shows a strong correlation with household structure. Young singles and middle families with school aged children are most likely to drive straight from A to B. Young couples and pre-school families are more likely to stop off as a journey break. Older adults and older singles are most likely to take their time and stop wherever they please.
- Almost all travellers used their own car to travel (86%) and 19% towed a caravan on their journey.
- These travellers are experienced at moving around Queensland. Only 9% were experiencing independent road travel in Queensland for the first time while 43% had undertaken this type of trip at least six times before.
- Only 22% of travellers stayed with friends and relatives during their visit to Queensland, the remainder used paid accommodation with a preference for either hotels/motels or camping/caravan parks/cabins.
- Although 44% of travellers spend less than a month planning for their trip, a significant minority (16%) spend more than six months pre-planning.

- A significant proportion of travel decisions are made 'on the road':
 - 41% did not plan their entire route before leaving home;
 - Only 24% booked all their accommodation in advance;
 - Only 29% planned all the towns they wanted to visit;
 - Only 20% planned all the activities they wanted to undertake.

- This obviously has implications in terms of the important part played by tourist information facilities 'on the ground' and the opportunities to influence travellers in their decisions as they move around the State.

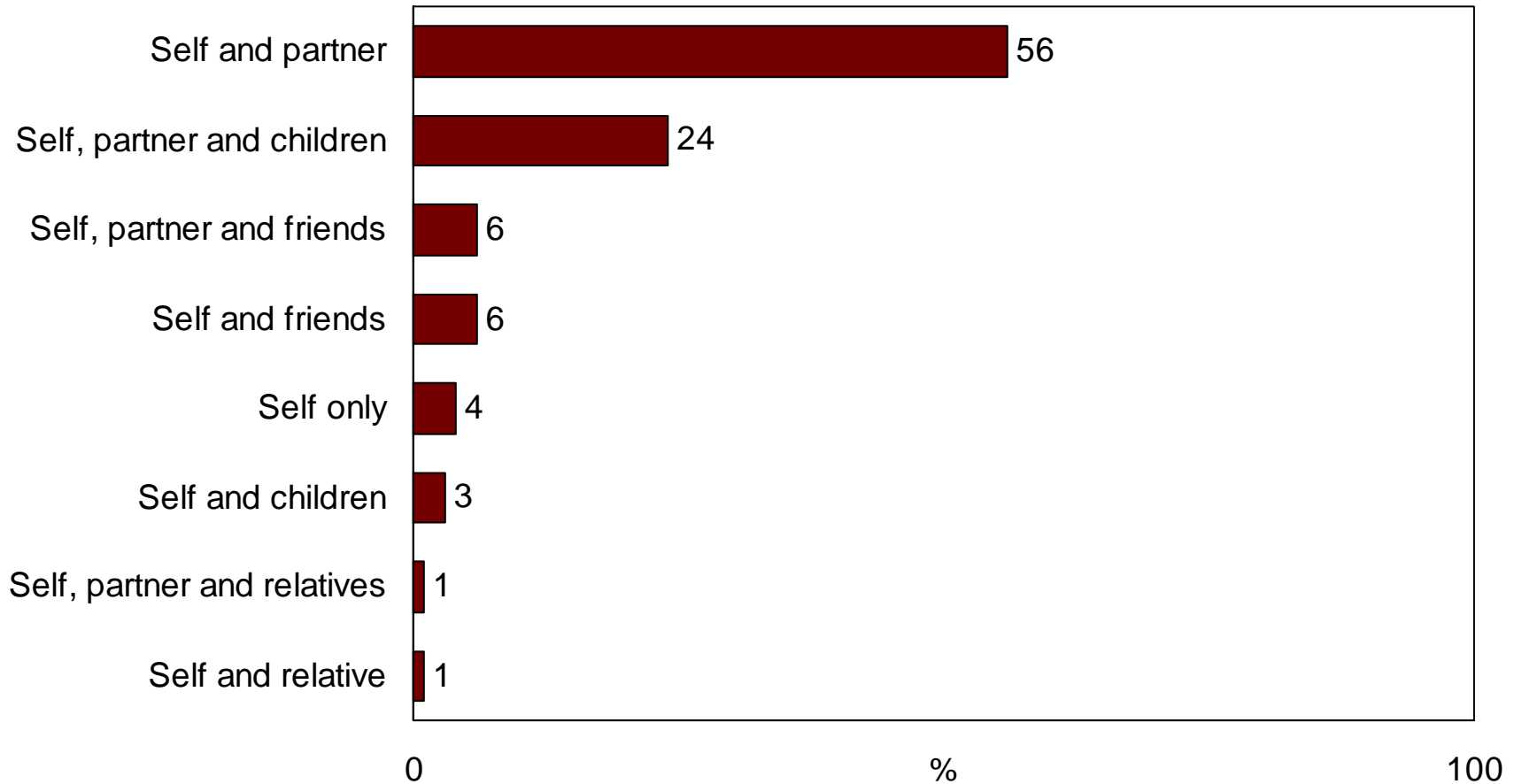
Last holiday road trip - route travelled



Base: Total sample (n=313)

Last road trip - party composition

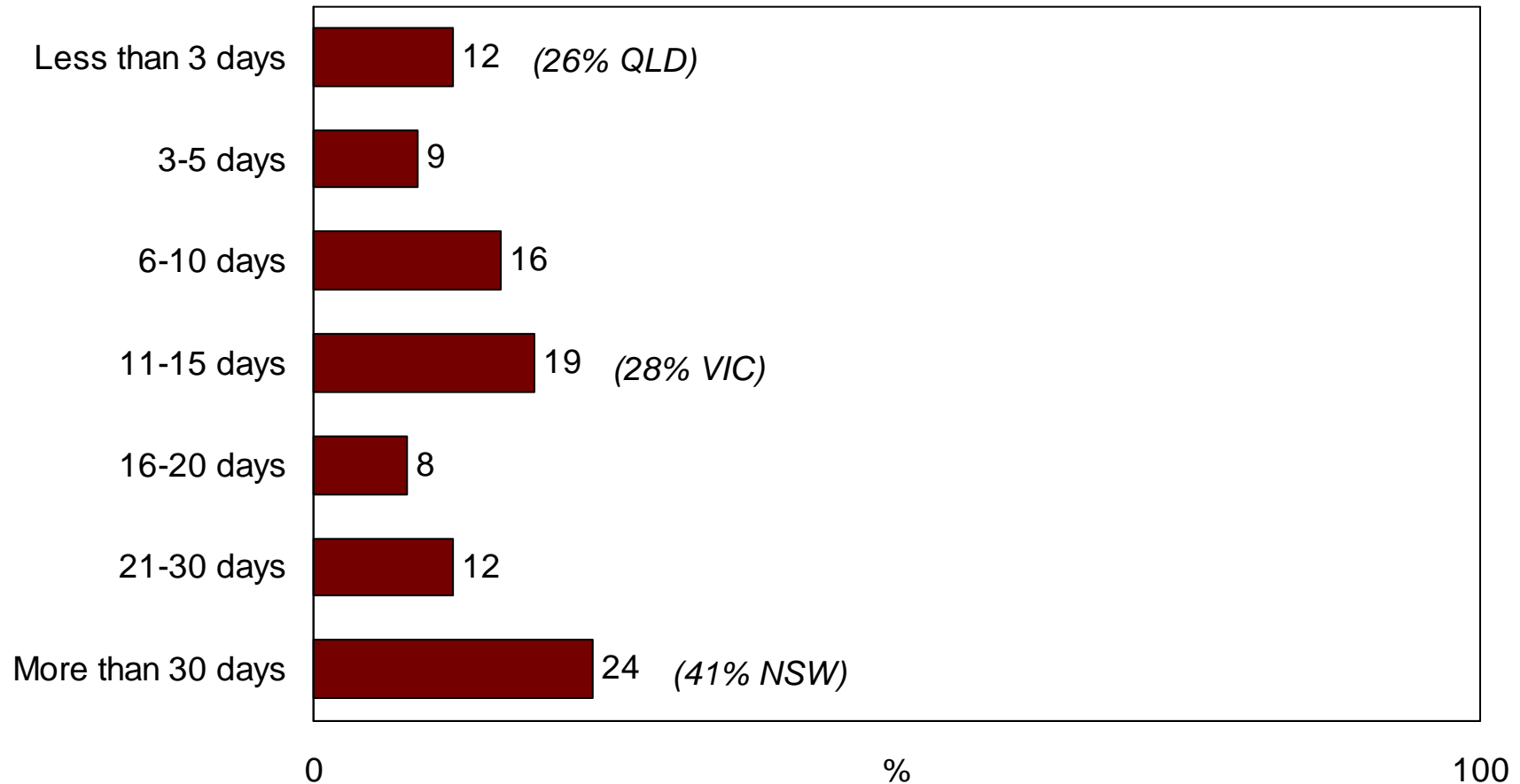
Who did you make this trip with?



Base: Total sample (n=313)

Last road trip - time taken

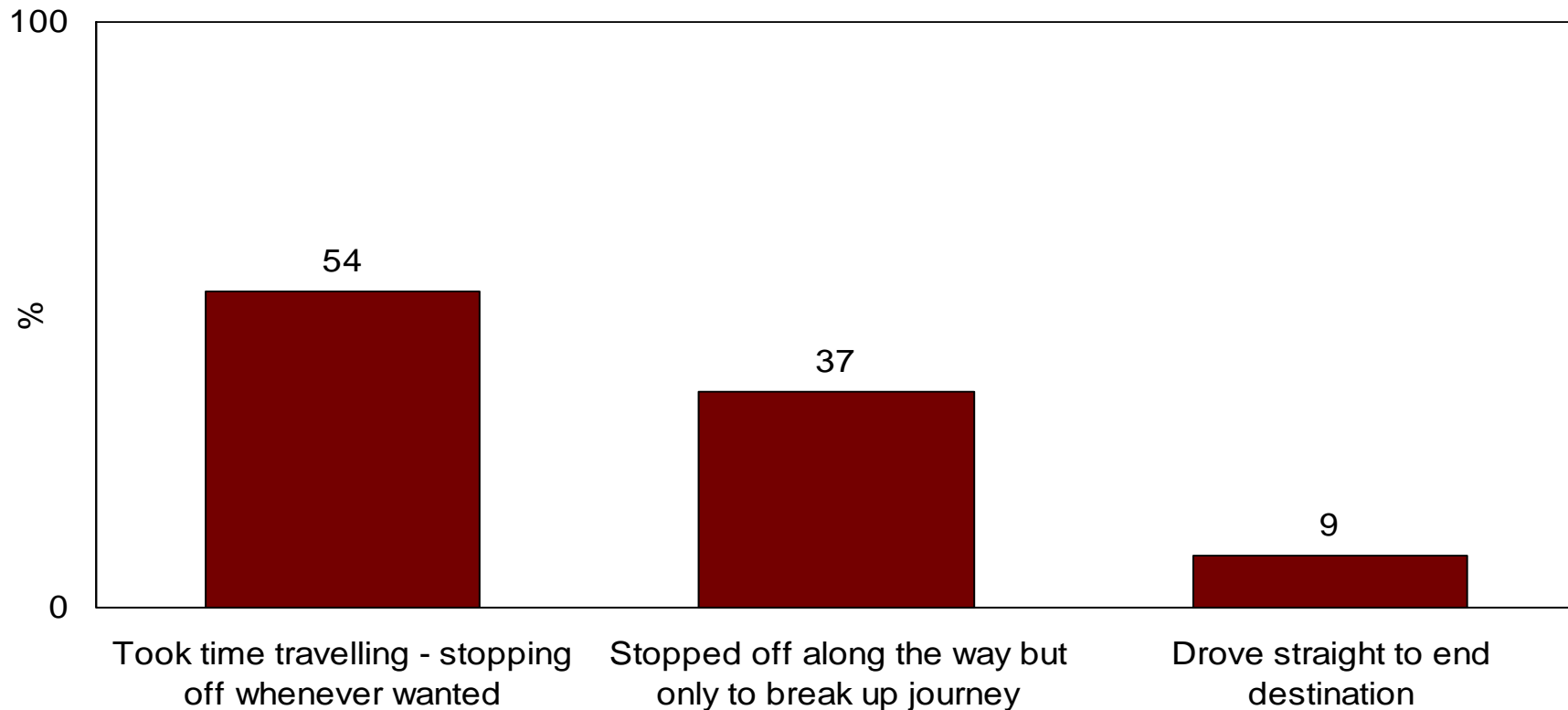
How long did this trip in Queensland take from start to finish?



Base: Total sample (n=313)

Last road trip - description

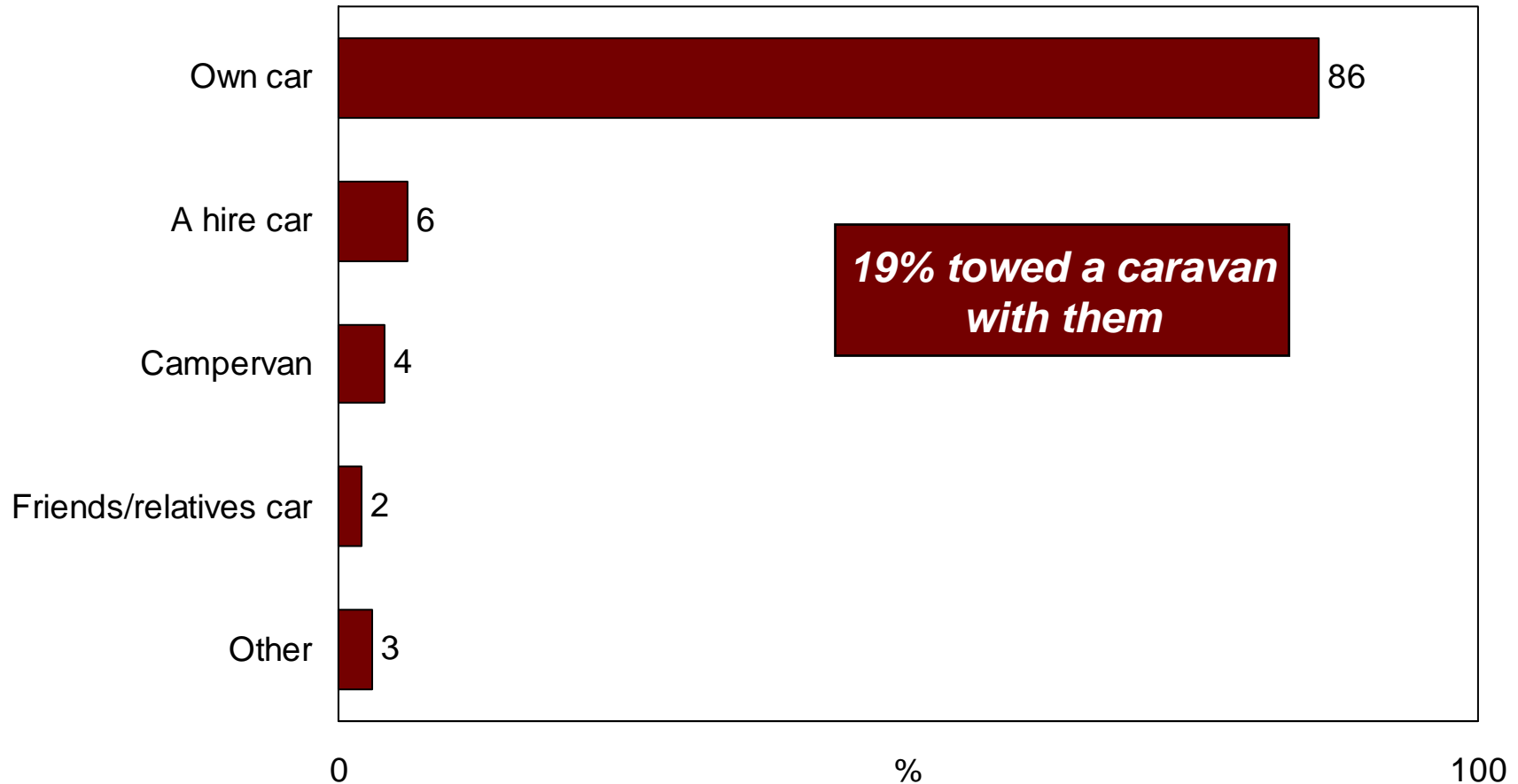
Which of these best describes your trip?



Base: Total sample (n=313)

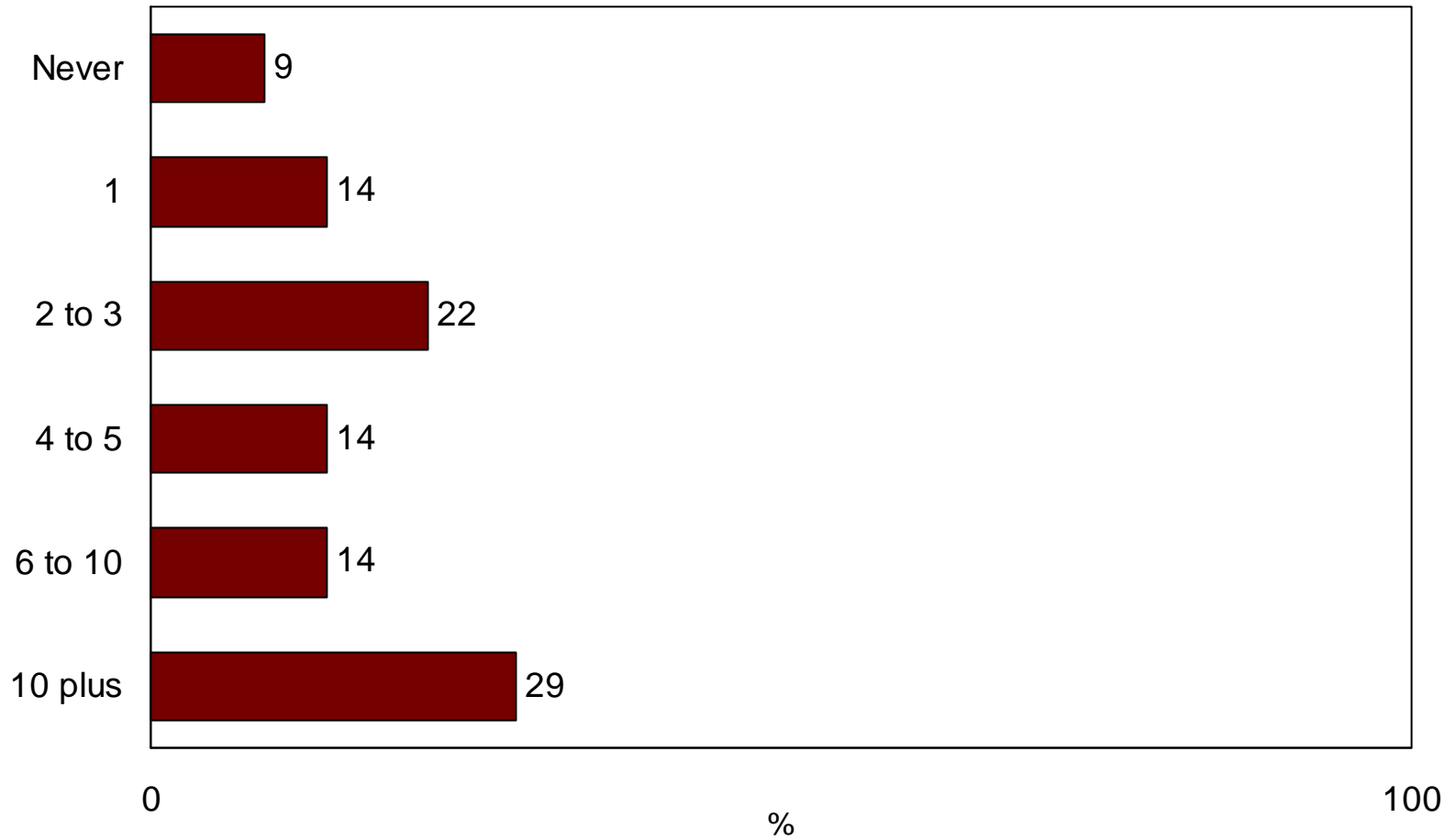
Last road trip - main form of transport

What was the main form of transport you used on this trip in Queensland?



Number of road trips in Queensland

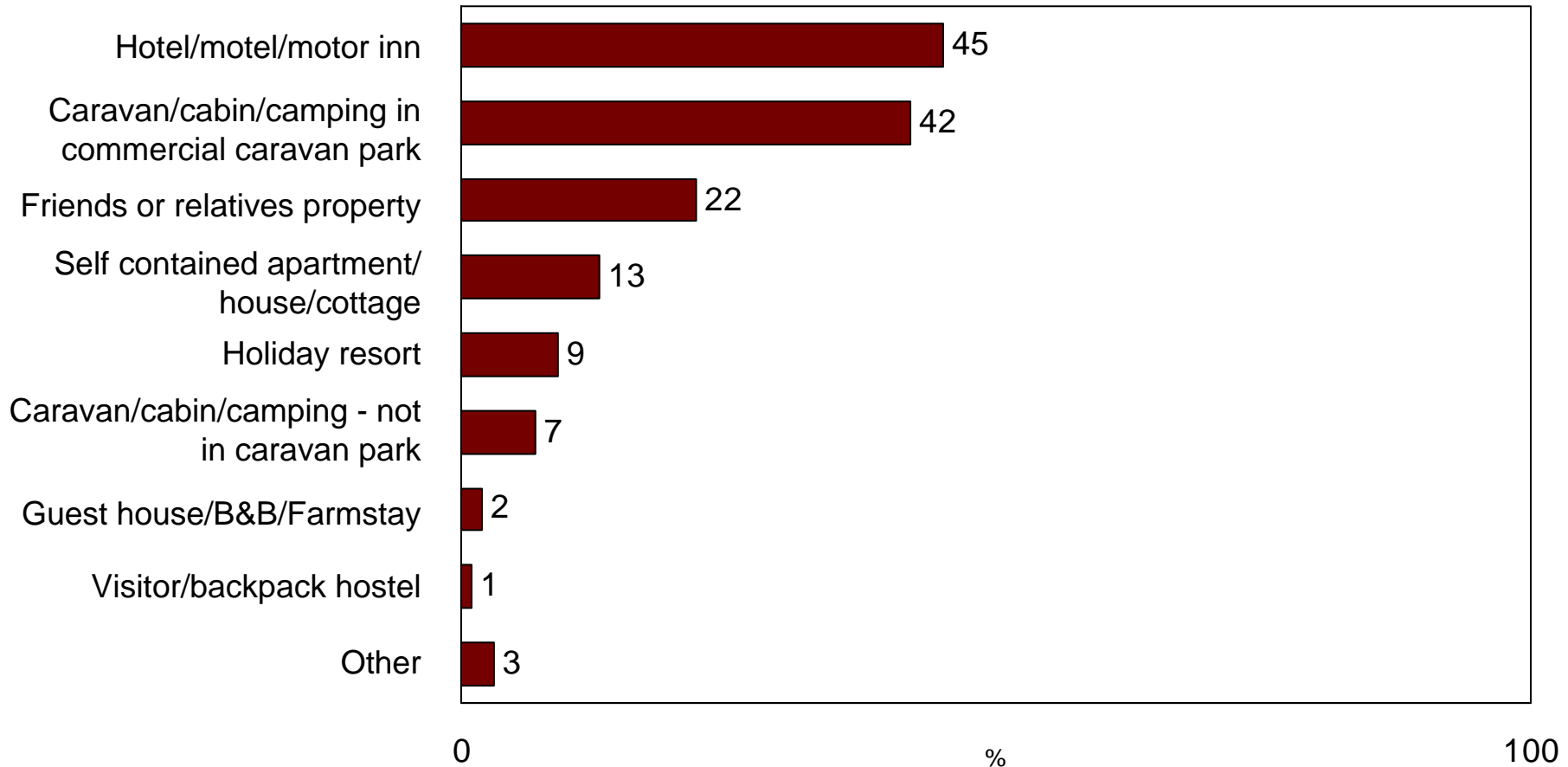
How many times have you taken a trip of this length in Queensland before?



Base: Total sample (n=313)

Last road trip - accommodation

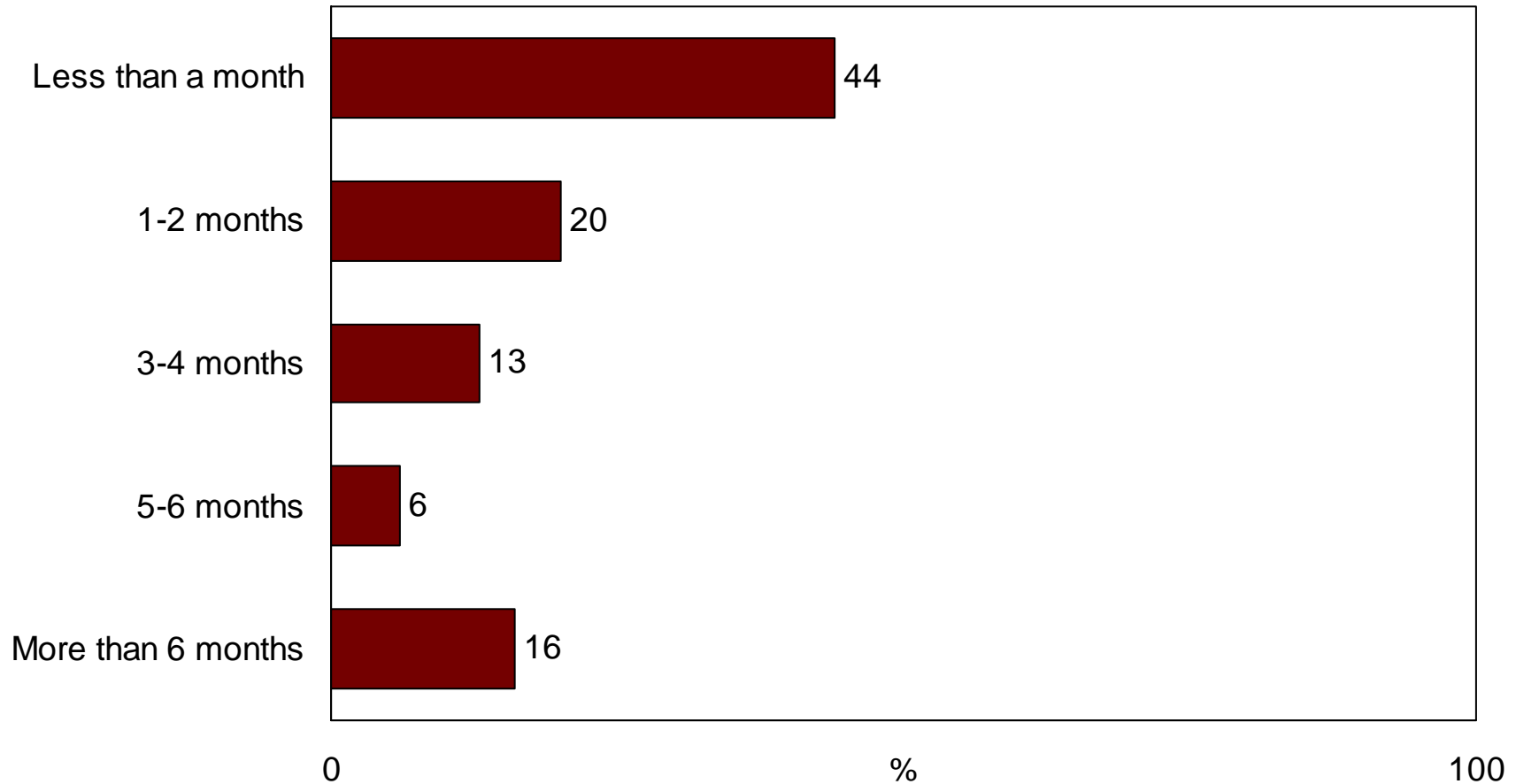
What types of accommodation did you use on your trip?



Base: Total sample (n=313)

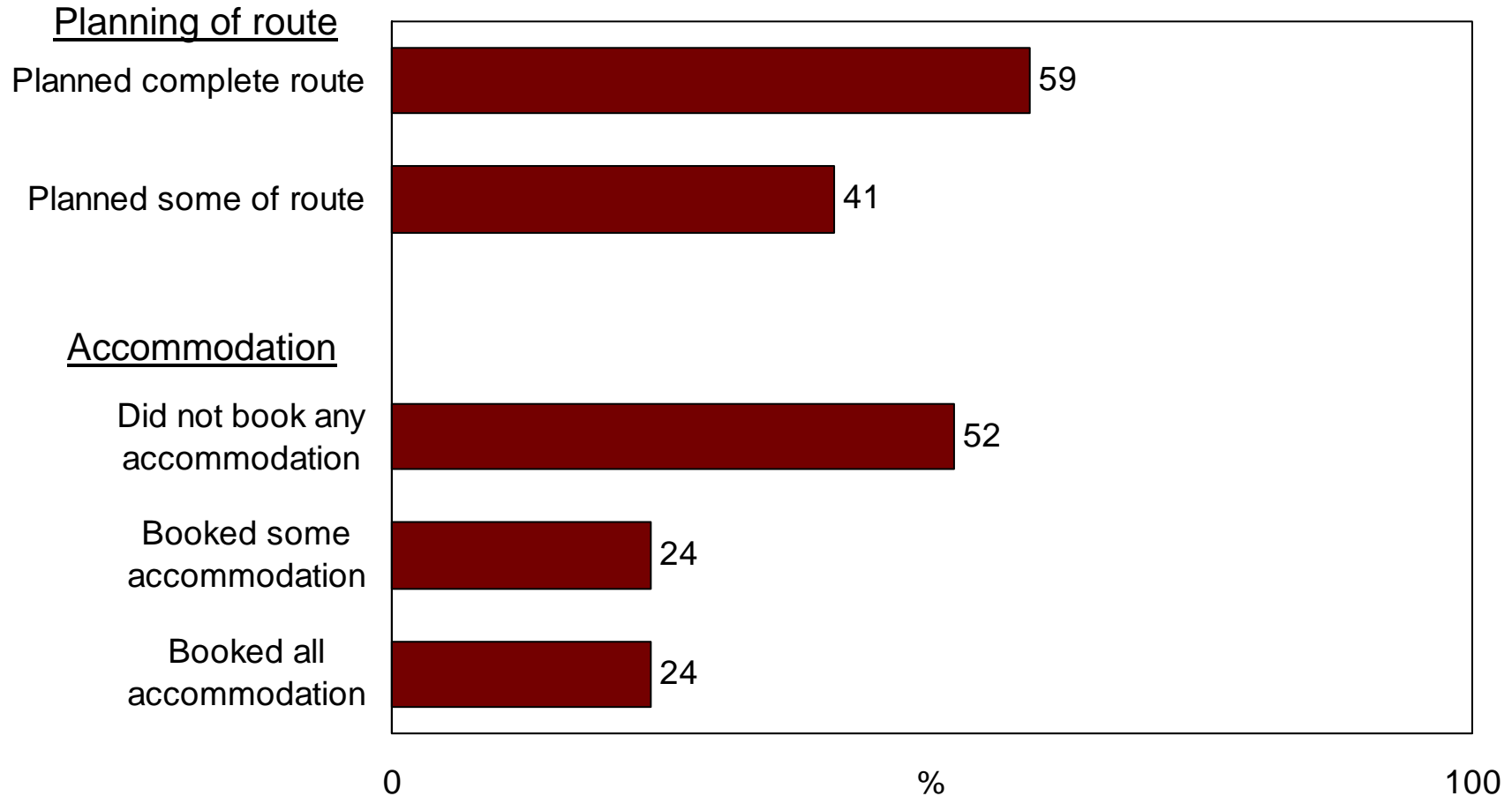
Last road trip - planning time

How long did you spend planning for this trip?



Base: Total sample (n=313)

How much did you organise before you left home on this trip?



Base: Total sample (n=313)

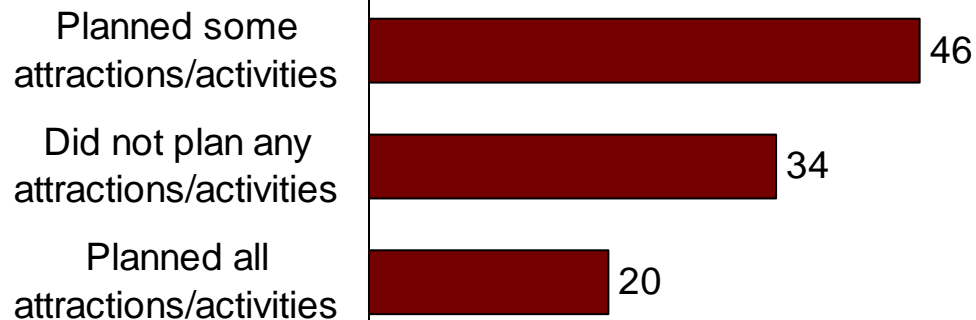
Last road trip - organisation (cont'd)

How much did you organise before you left home on this trip?

Towns to visit



Attractions/activities



0 % 100

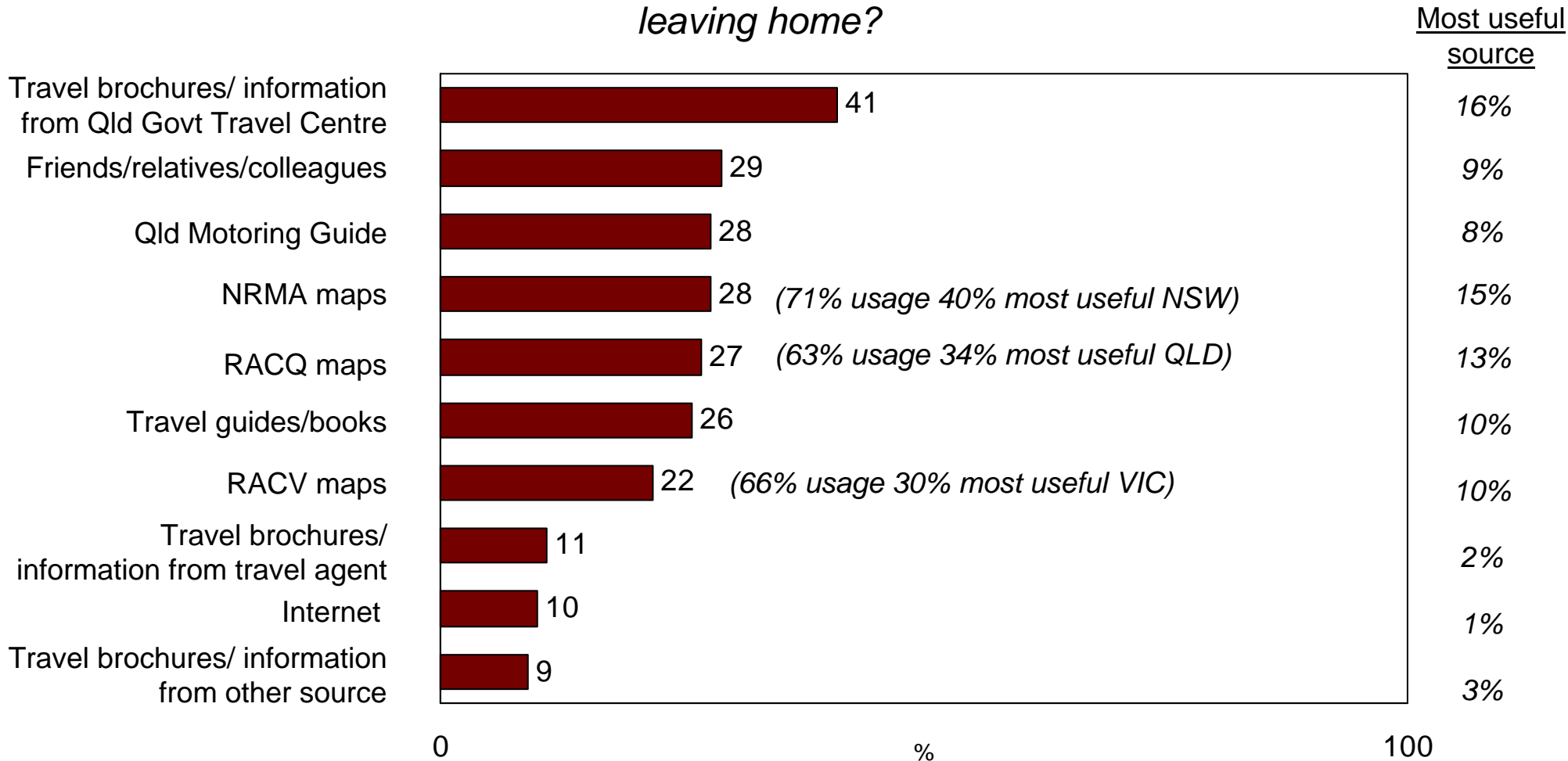
Information Sources

- Before leaving home, travellers use a variety of information sources about Queensland. Top of the list overall is Tourism Queensland (their 'Queensland government travel service'). This is a particular source of information for interstate travellers (53% New South Wales and 41% Victoria) but is also in the top three for Queensland residents (26%).
- The most popular source of pre-travel information across all States are the local motoring organisations' maps (63% RACQ in Queensland, 71% NRMA in New South Wales, 66% RACV in Victoria).
- Word of mouth has a strong influence and is likely to act as a filter to the information read in brochures, guides and maps. The Internet has a core of users but is yet to realise the benefits afforded by physical reference to a map, brochure or guide.
- In terms of sourcing information relating to accommodation during their trip, local presence has a great deal of impact. This includes the property itself, signage leading up to the property and the influence of local tourist information centres. 5% of travellers mentioned information boards as a source of accommodation information.
- When it comes to attractions and activities, the local tourist information centres come into their own. Talking to staff and picking up brochures dominate as sources of information regarding what to do in an area.

- Other important aspects for local attractions include literature at accommodation outlets and positive word of mouth from the locals. Local signage is also likely to play a significant role in attracting people inside the door. Again information boards receive low mention at 6%.
- In terms of finding directions while travelling, motoring authority maps, en-route signage and local information centres provide the key.
- When asked what type of information was missing during their trip, the importance of local knowledge is once again reinforced. Travellers talk about the desire for more personal recommendations and local knowledge during their travels. For many this is what travelling is all about, interacting with the locals and moving away from overt tourism. This can only be achieved through personal interaction at the destination.

Planning trip - information sources used

Which of these information sources did you use to **plan the trip** before leaving home?

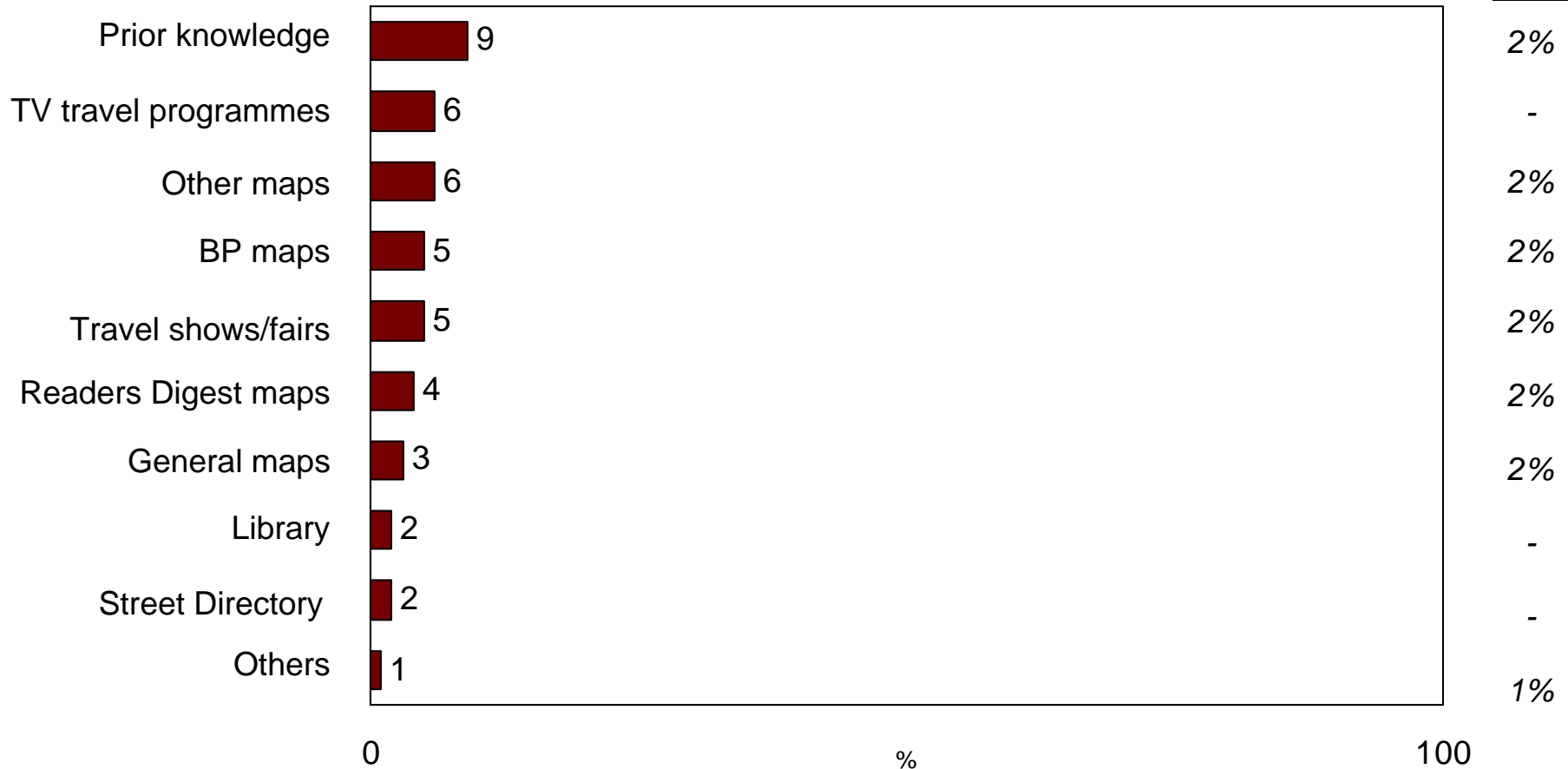


Base: Total sample (n=313)

Planning trip - information sources used (cont'd)

Which of these information sources did you use to **plan the trip** before leaving home?

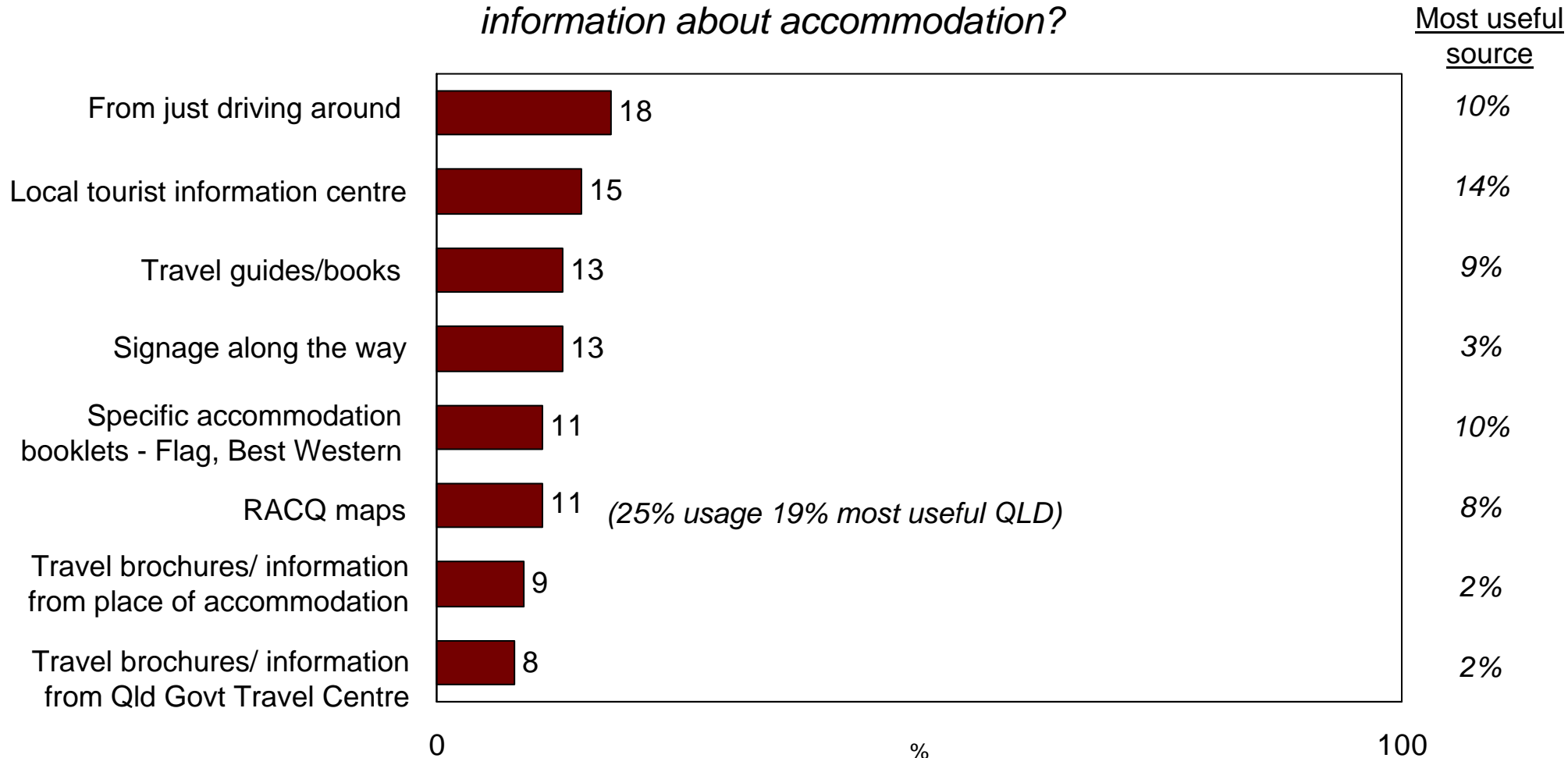
Most useful source



Base: Total sample (n=313)

Accommodation - information sources used

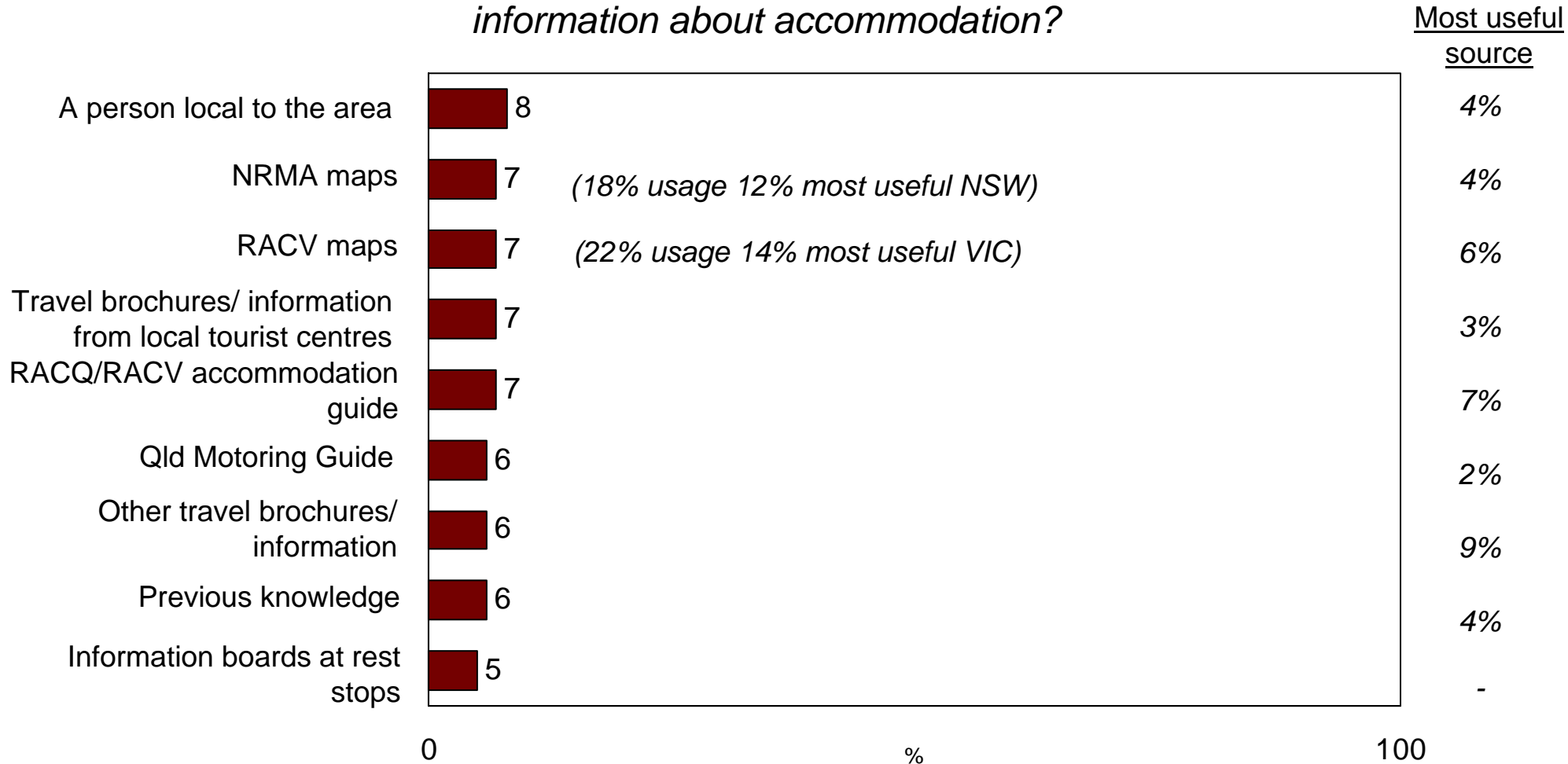
Which of the following information sources did you use **during your trip** to source information about accommodation?



Base: Total sample (n=313)

Accommodation - information sources used (cont'd)

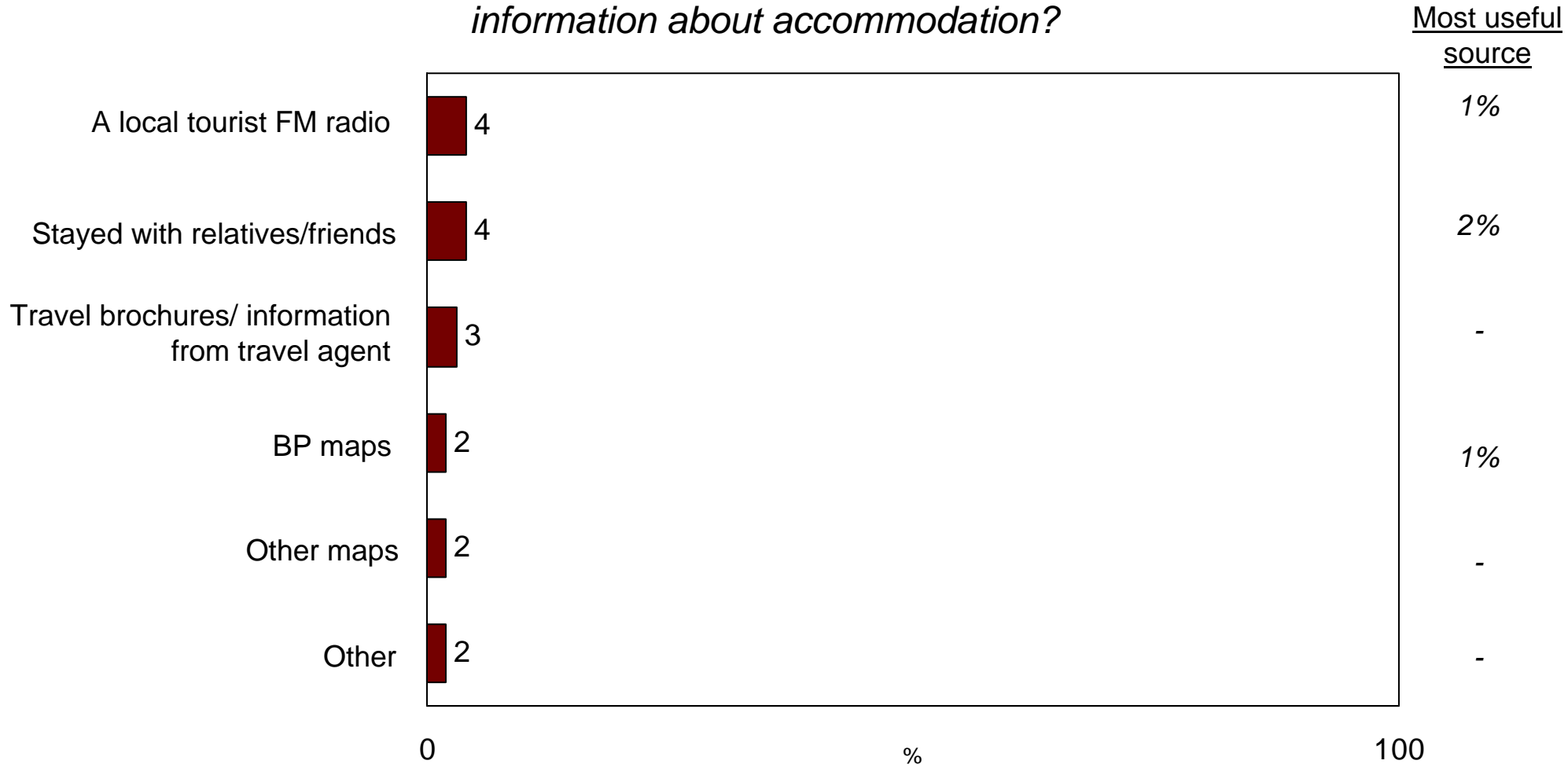
Which of the following information sources did you use **during your trip** to source information about accommodation?



Base: Total sample (n=313)

Accommodation - information sources used (cont'd)

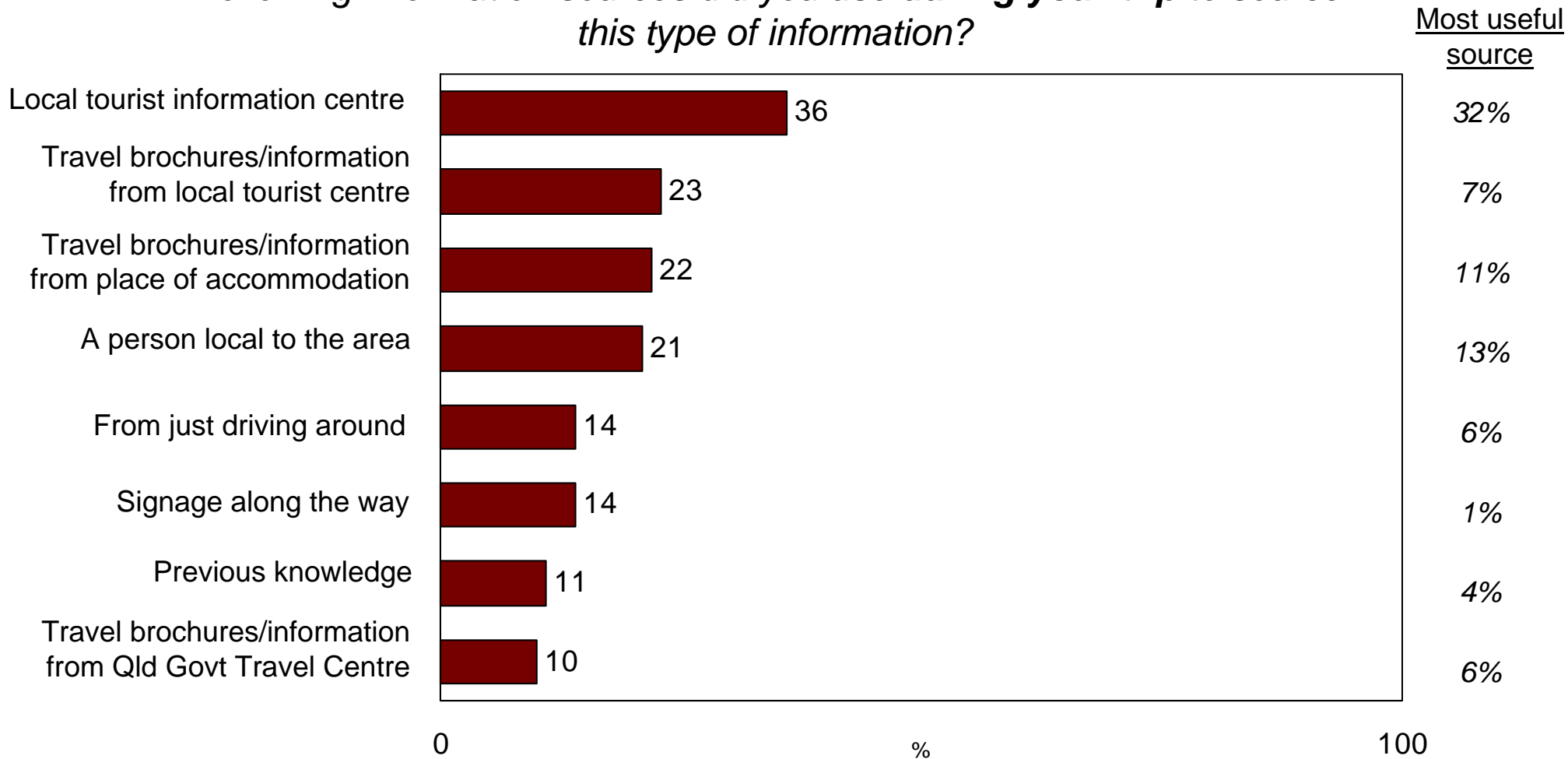
Which of the following information sources did you use **during your trip** to source information about accommodation?



Base: Total sample (n=313)

Attractions/activities/places to visit - information sources used

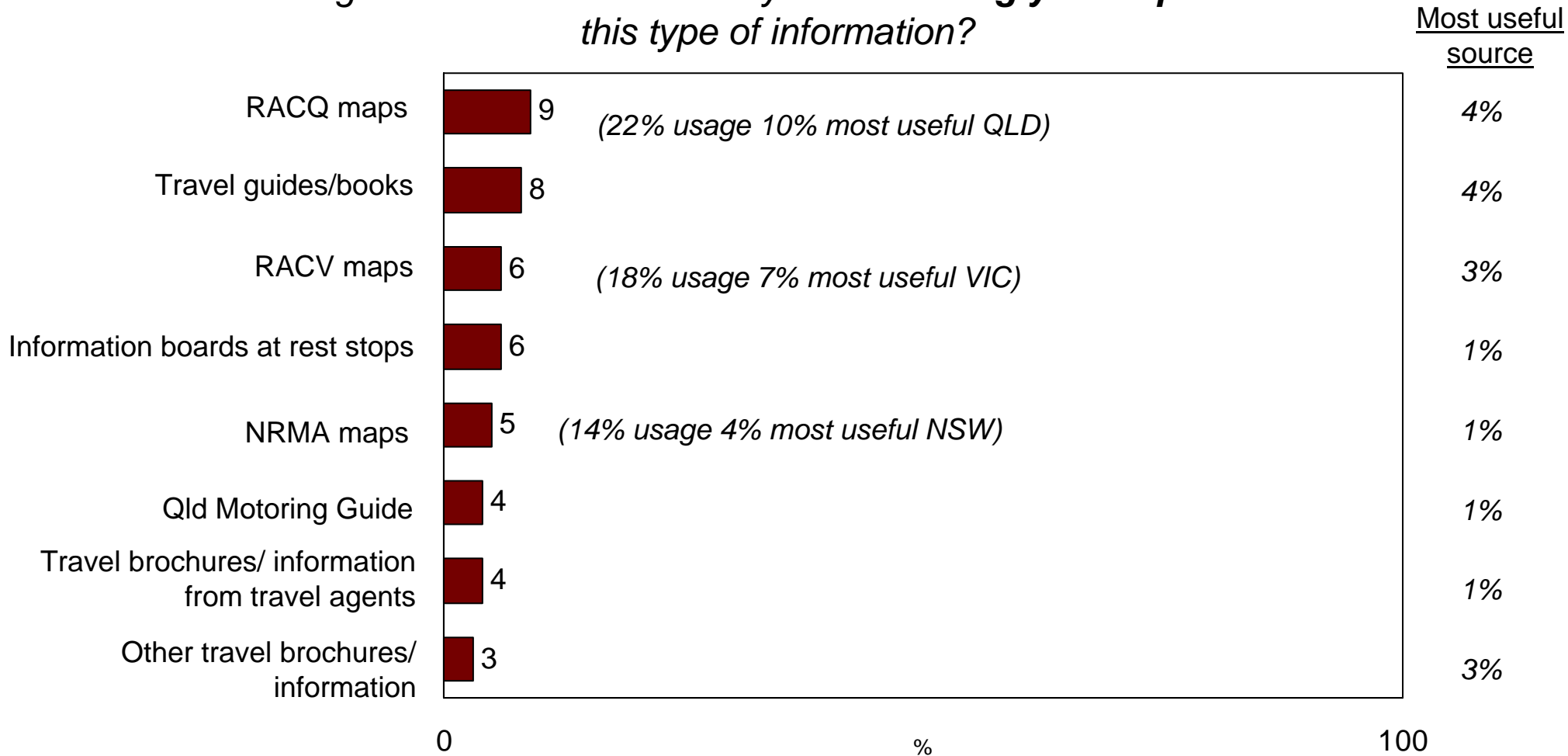
*Thinking now about local attractions, activities and places to visit, which of the following information sources did you use **during your trip** to source this type of information?*



Base: Total sample (n=313)

Attractions/activities/places to visit - information sources used (cont'd)

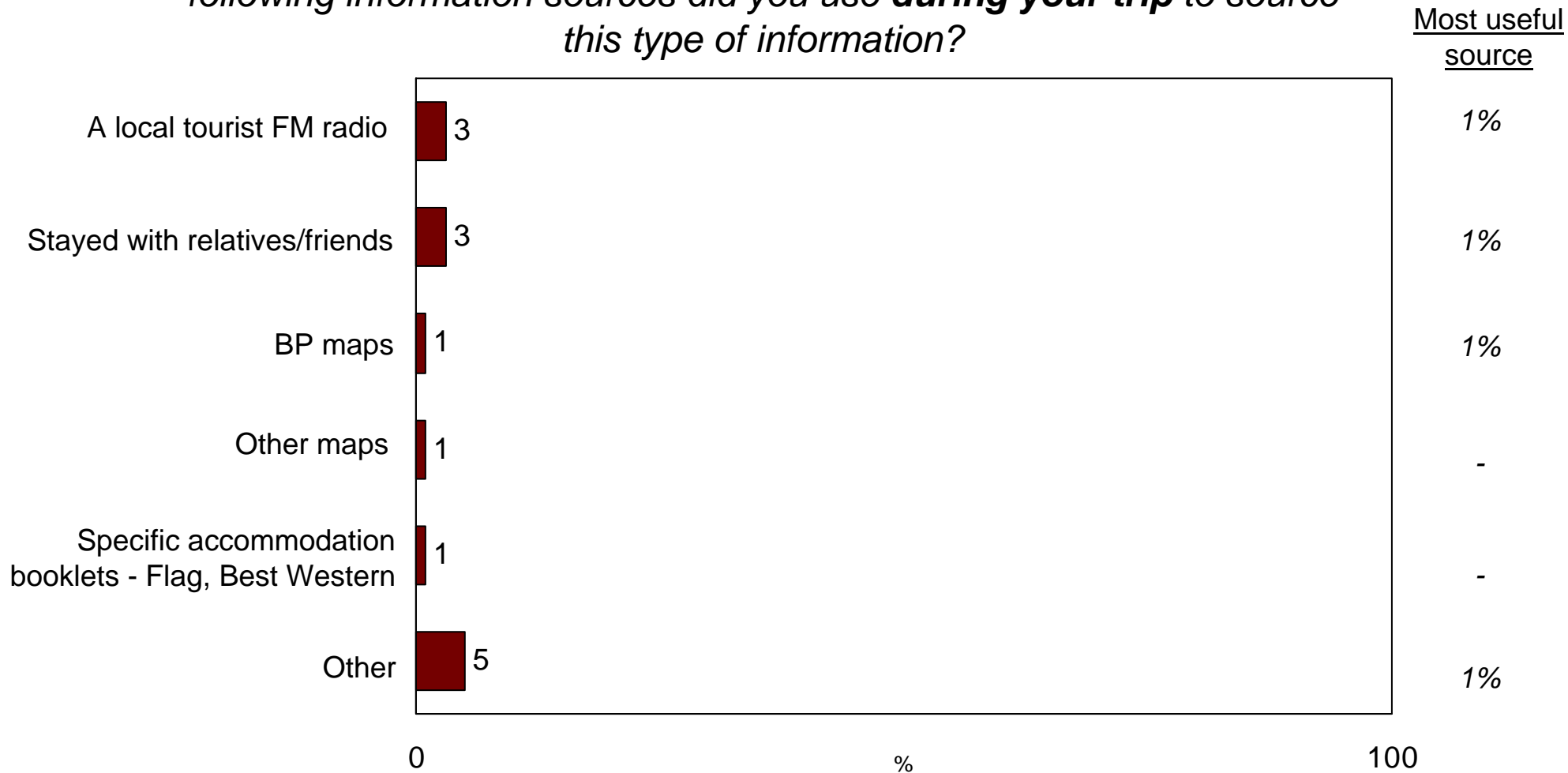
Thinking now about local attractions, activities and places to visit, which of the following information sources did you use **during your trip** to source this type of information?



Base: Total sample (n=313)

Attractions/activities/places to visit - information sources used (cont'd)

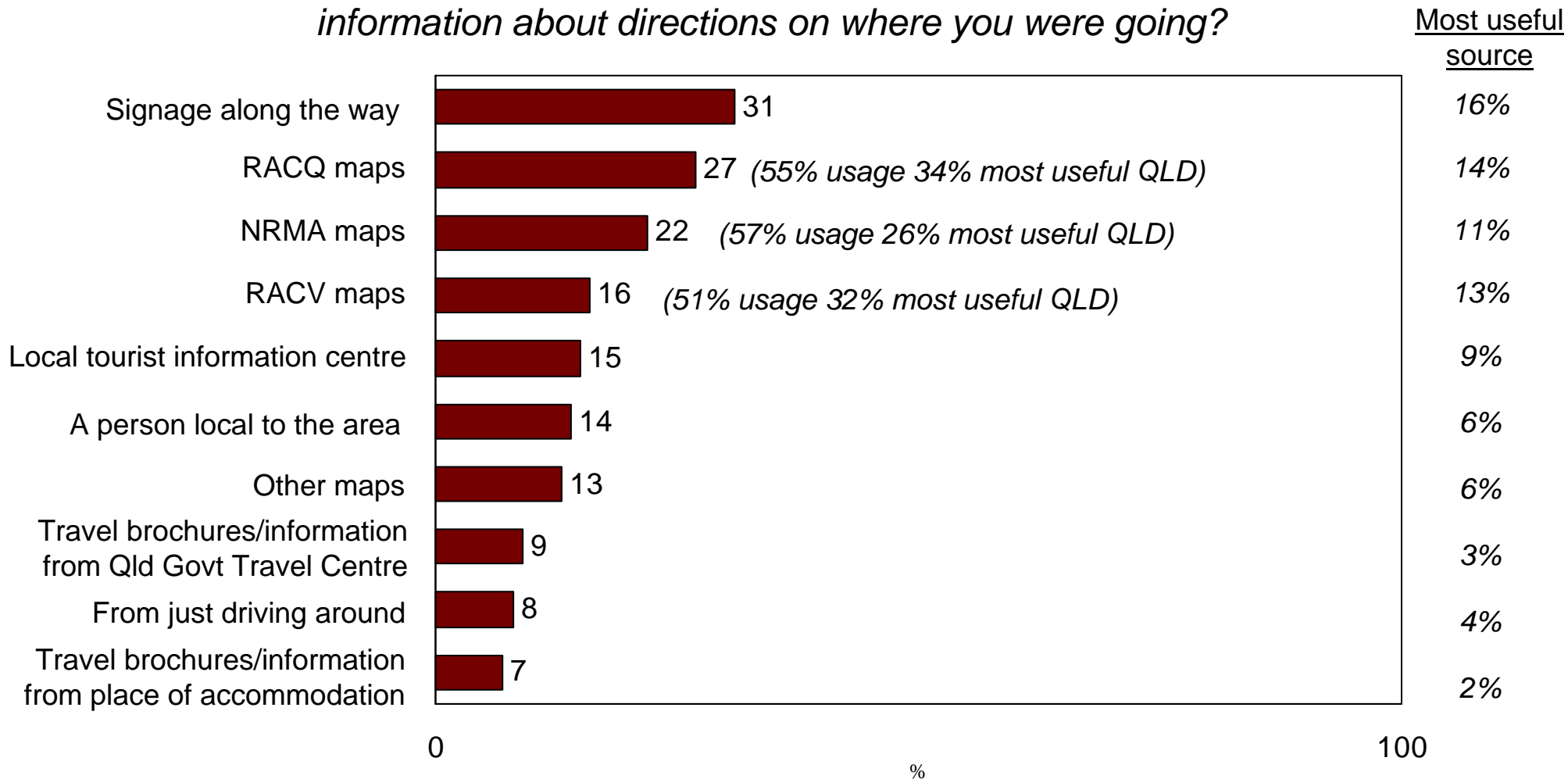
Thinking now about local attractions, activities and places to visit, which of the following information sources did you use **during your trip** to source this type of information?



Base: Total sample (n=313)

Directions - information sources used

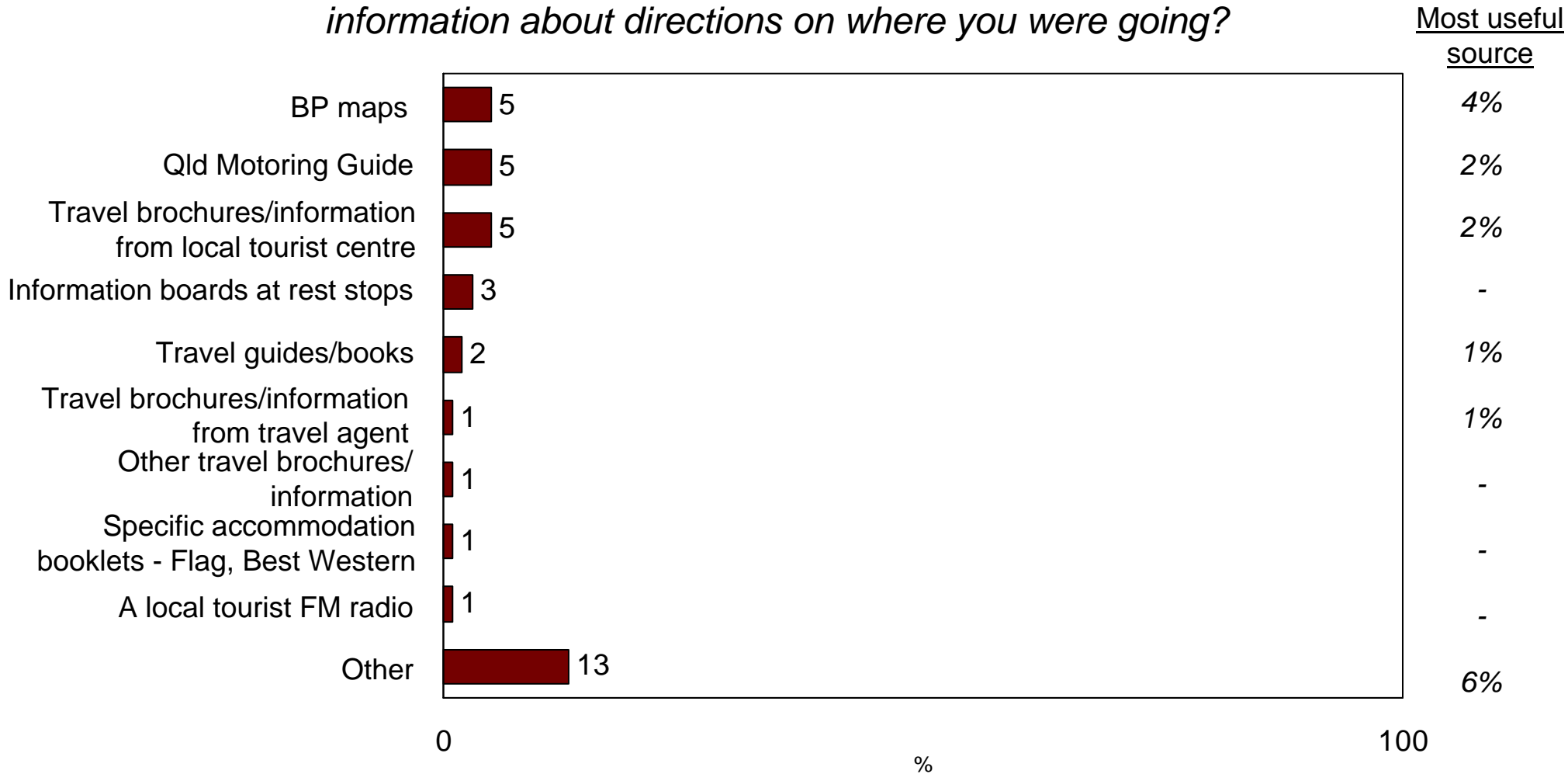
Which of the following information sources did you use **during your trip** to source information about directions on where you were going?



Base: Total sample (n=313)

Directions - information sources used (cont'd)

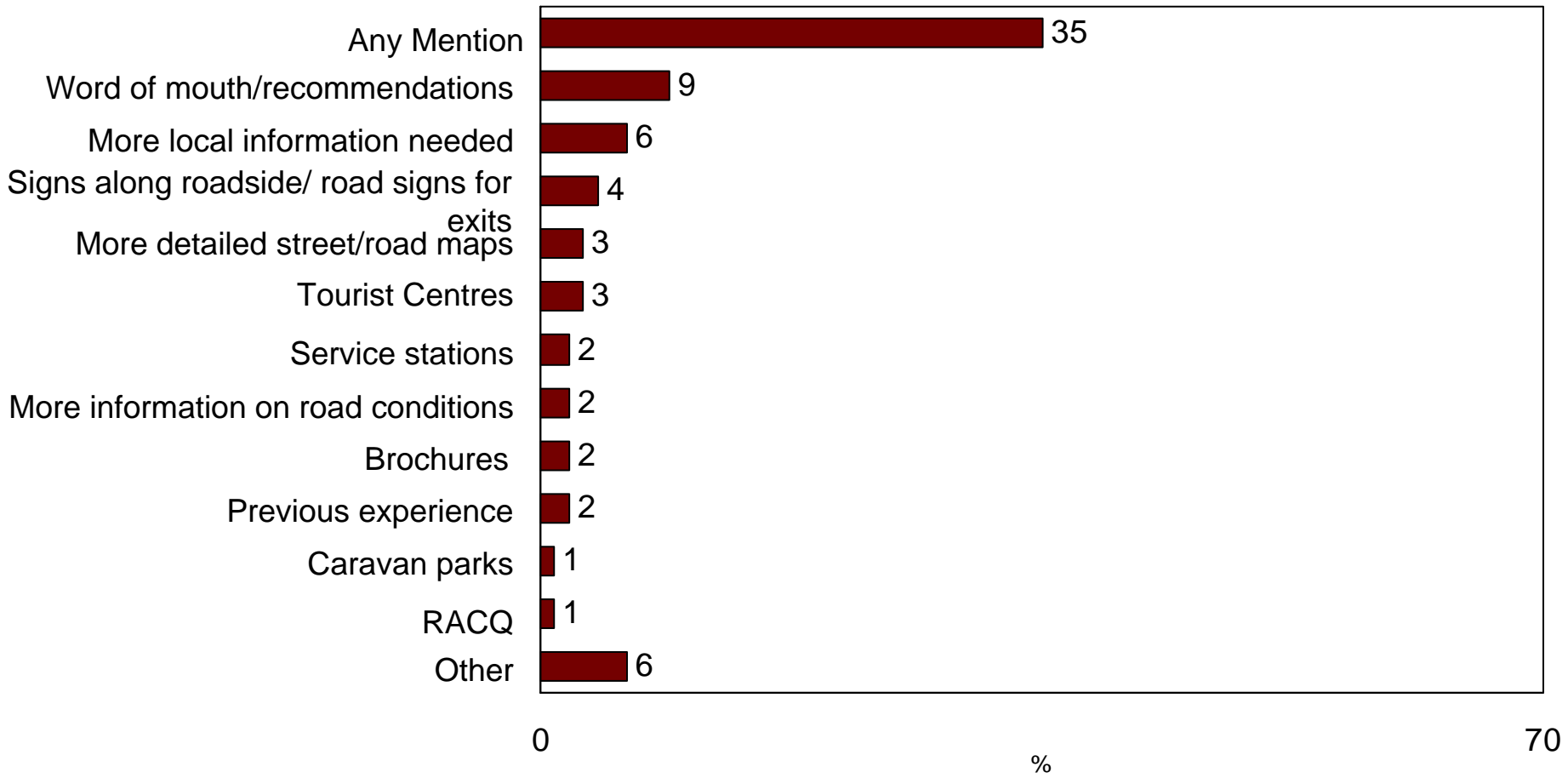
Which of the following information sources did you use **during your trip** to source information about directions on where you were going?



Base: Total sample (n=313)

Other useful sources of information

What other sources of information would you have found useful while on your trip?

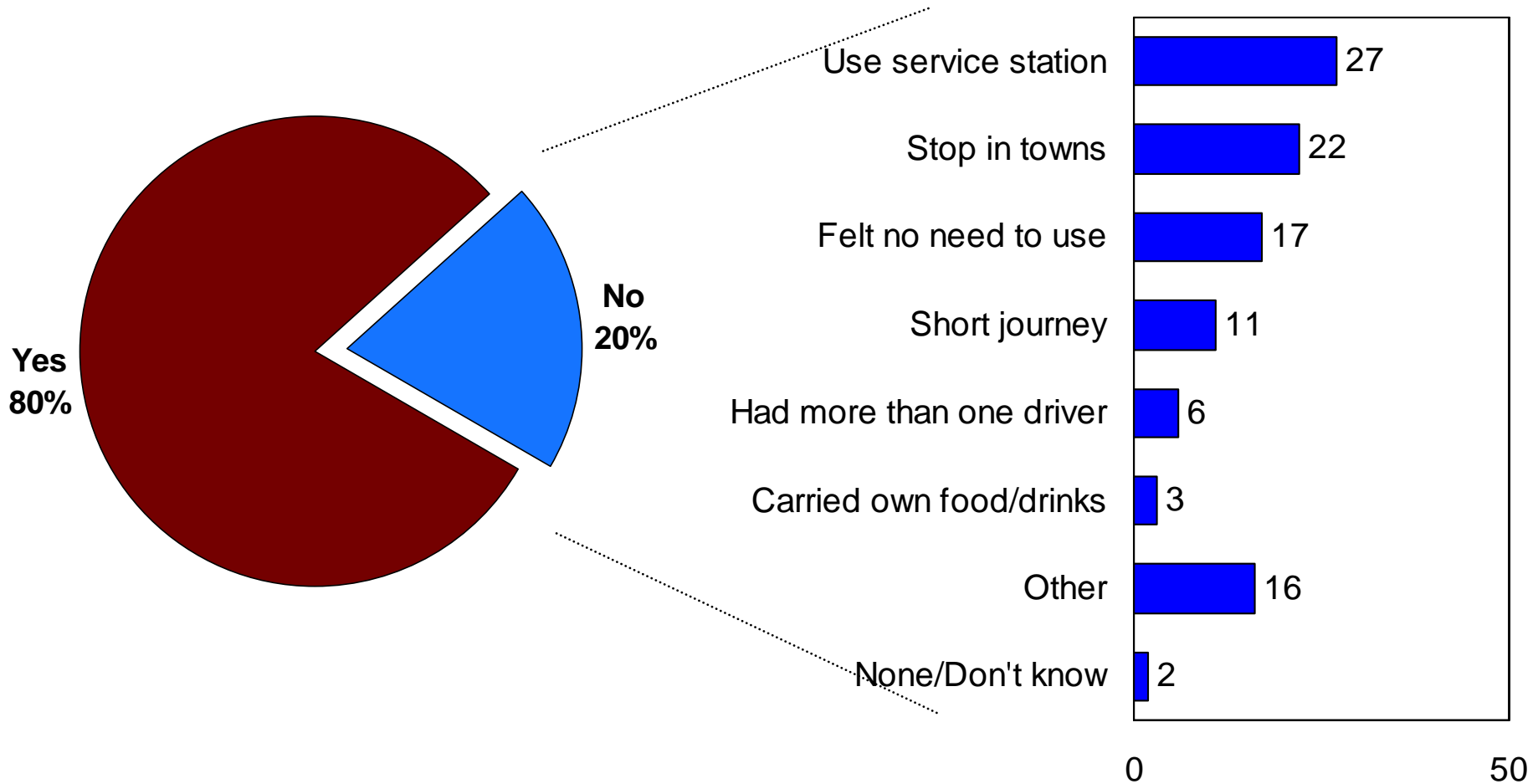


Base: Total sample (n=313)

Rest Areas

- Eight in ten travellers say they use rest areas while travelling and of those, almost nine in ten will read the information boards at rest stops.
- In terms of influencing behaviour, 55% of travellers claim that information boards may have some influence on what they do on a particular day. This level of claimed behaviour should be treated with caution. As we have seen from the qualitative research and current usage of rest stops by the quantitative sample, information boards per se are unlikely to have a significant effect on traveller behaviour. They are a 'nice to have' form of information provision.

Do you use rest areas when you are travelling by road? If not, why not?

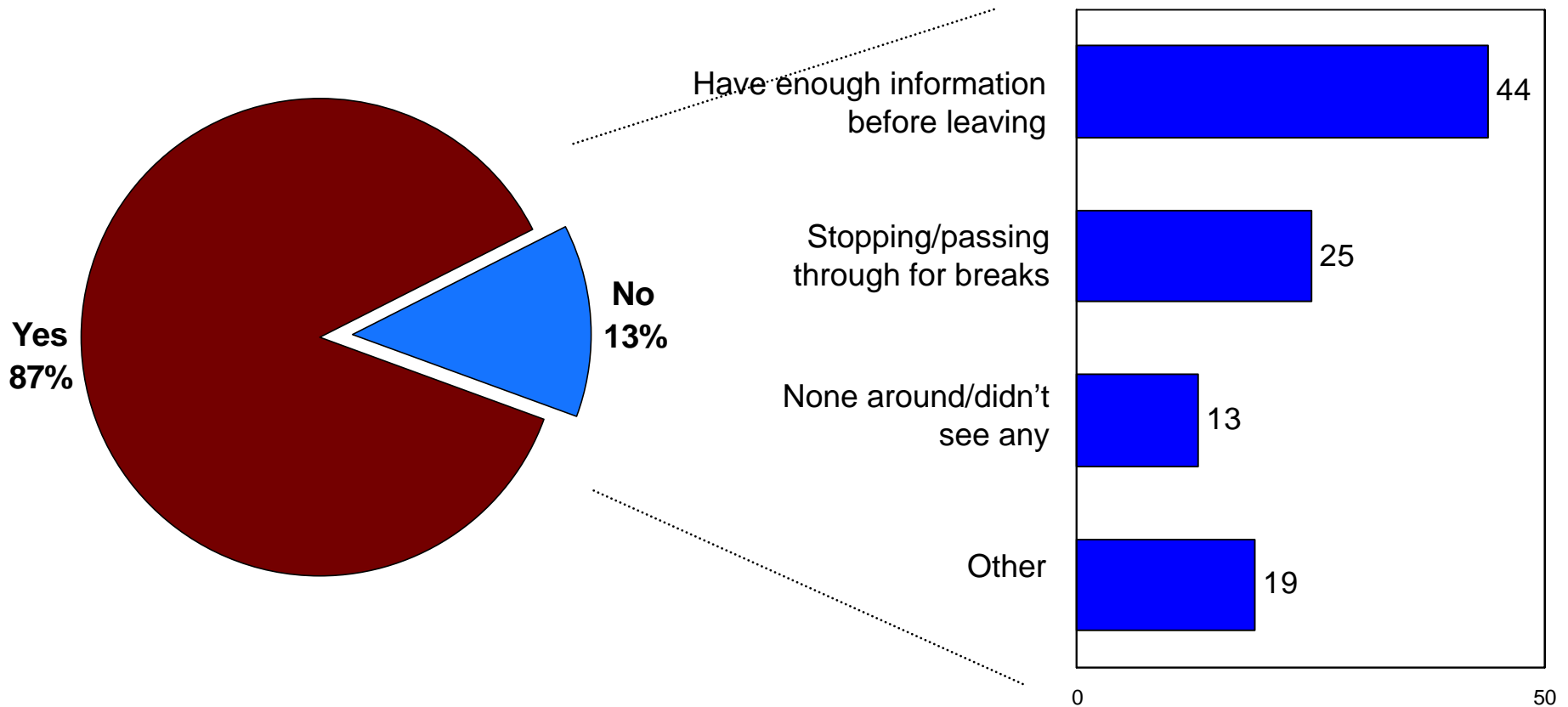


Base: Total sample (n=313)

Base: Those who do not use rest area (n=63)

Use of information boards

Would you read information on an information board about local attractions, activities or accommodation at rest areas? If not, why not?

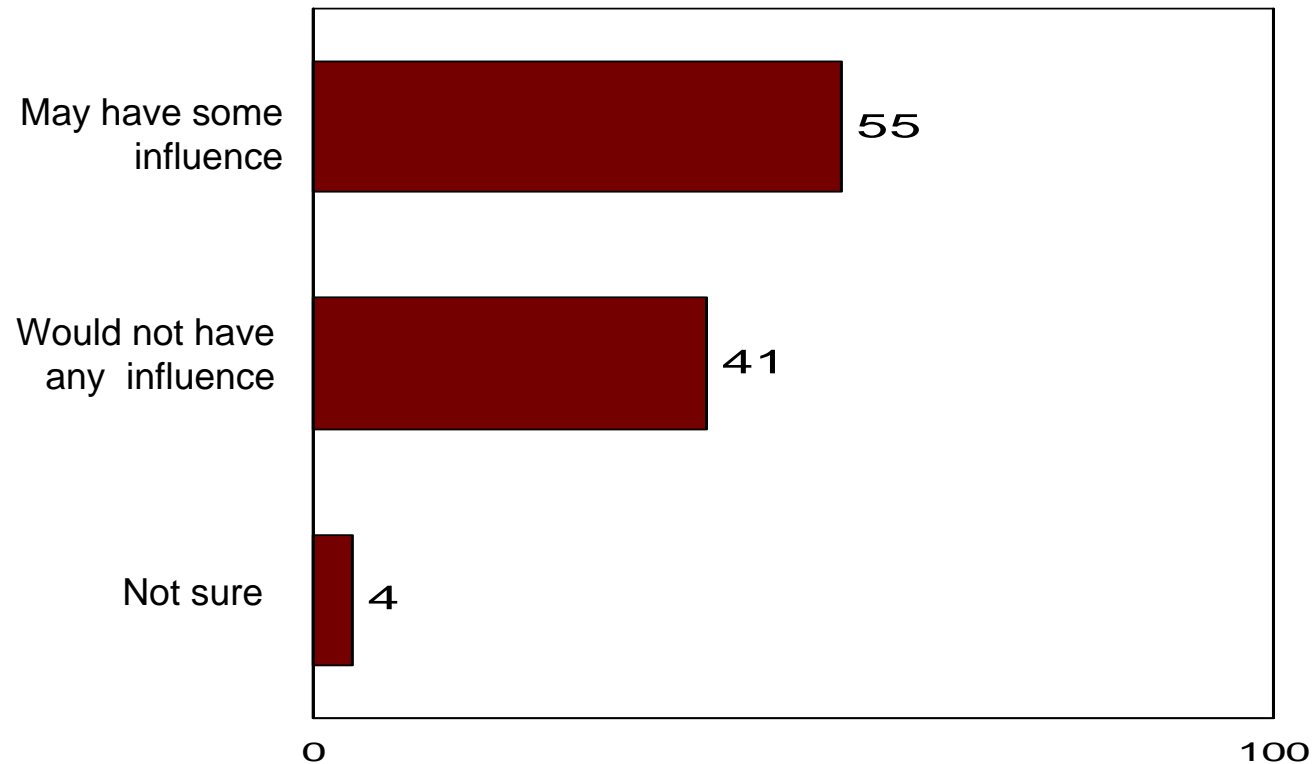


Base: Total sample (n=313)

Base: Those who would not use information boards (n=32)

Influence of information boards

How likely would the information influence your plans for that day?



Base: Total sample (n=313)

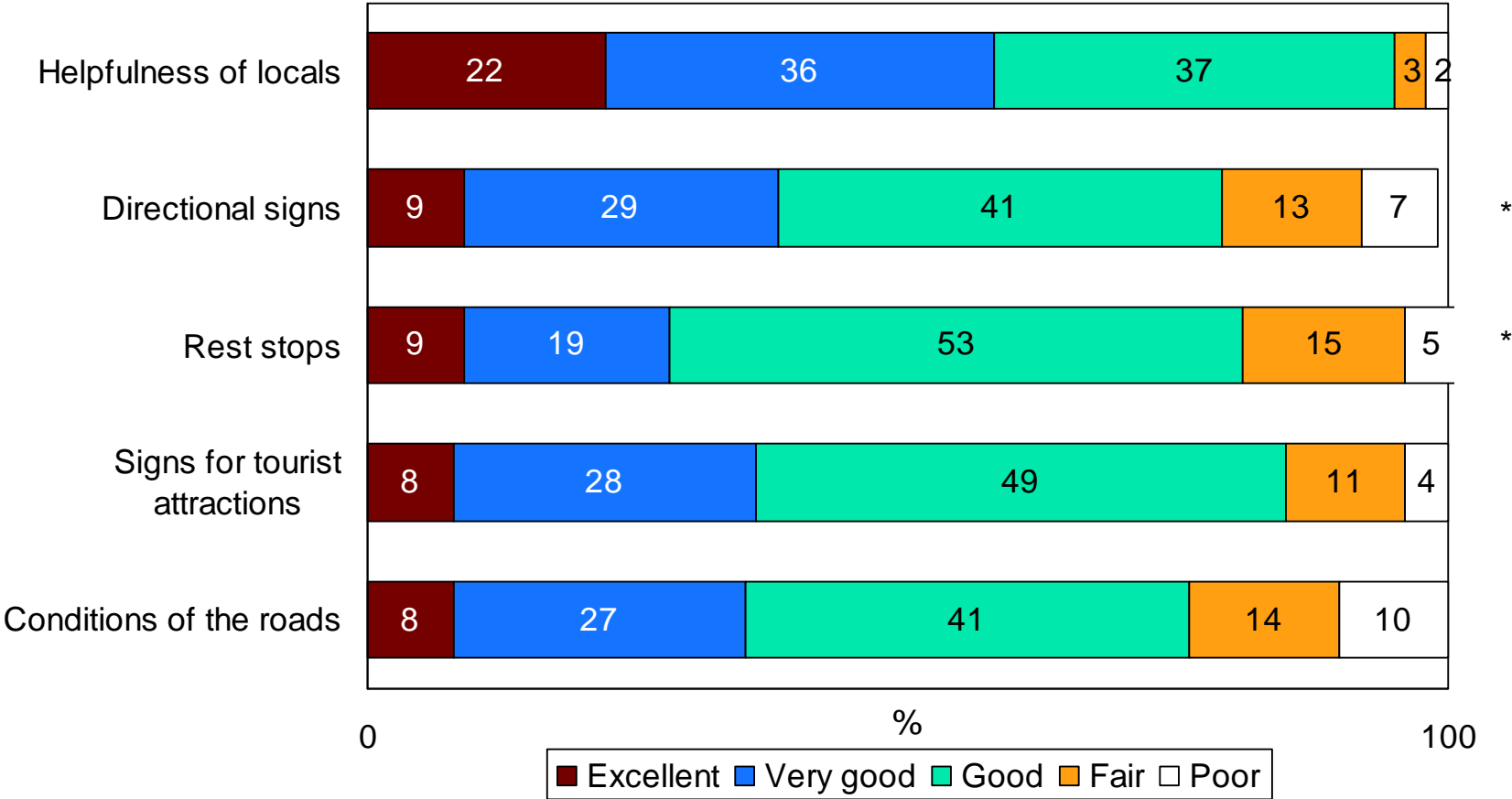
Attitudes to Travel

- The Queensland locals are a major strength for tourism and receive a relatively high rating in terms of their helpfulness towards road travellers.
- What rates less well and more as being average or adequate is the road infrastructure in Queensland including signage (directional and tourist attractions), rest stops and the general condition of the roads.
- Dislikes for signage centre on an inadequacy of supply, unclear signage and lack of warning prior to road turn-offs.
- The majority of road travellers share a common set of attitudes:
 - * They enjoy stopping off along the way during their travels;
 - * They believe there is always something of interest along the way;
 - * They prefer to leave their options open when travelling (this can range from where to have lunch through to which direction to set off on);
 - * They enjoy stopping off, in particular to meet the locals.

- Where the market is more segmented, however, is in relation to four key measures:
 - Those who prefer to pre-plan everything before they leave vs those who are more spontaneous;
 - Those who believe driving is a means to an end vs those who enjoy the driving experience;
 - Those who agree driving can often be boring vs those who will always find something of interest;
 - Those who have more fun travelling than arriving vs those who like to arrive at their destination.
- There are no clear demographic differences to define these segments (although those with pre-school children appear to plan more), rather it is based on the personality and needs of the travellers themselves.
- The key to this is providing an information system which allows an element of pre-planning before leaving home yet follows through with useful and credible information on the ground at the destination. This allows the spontaneity of road travel to be maintained and enjoyed.

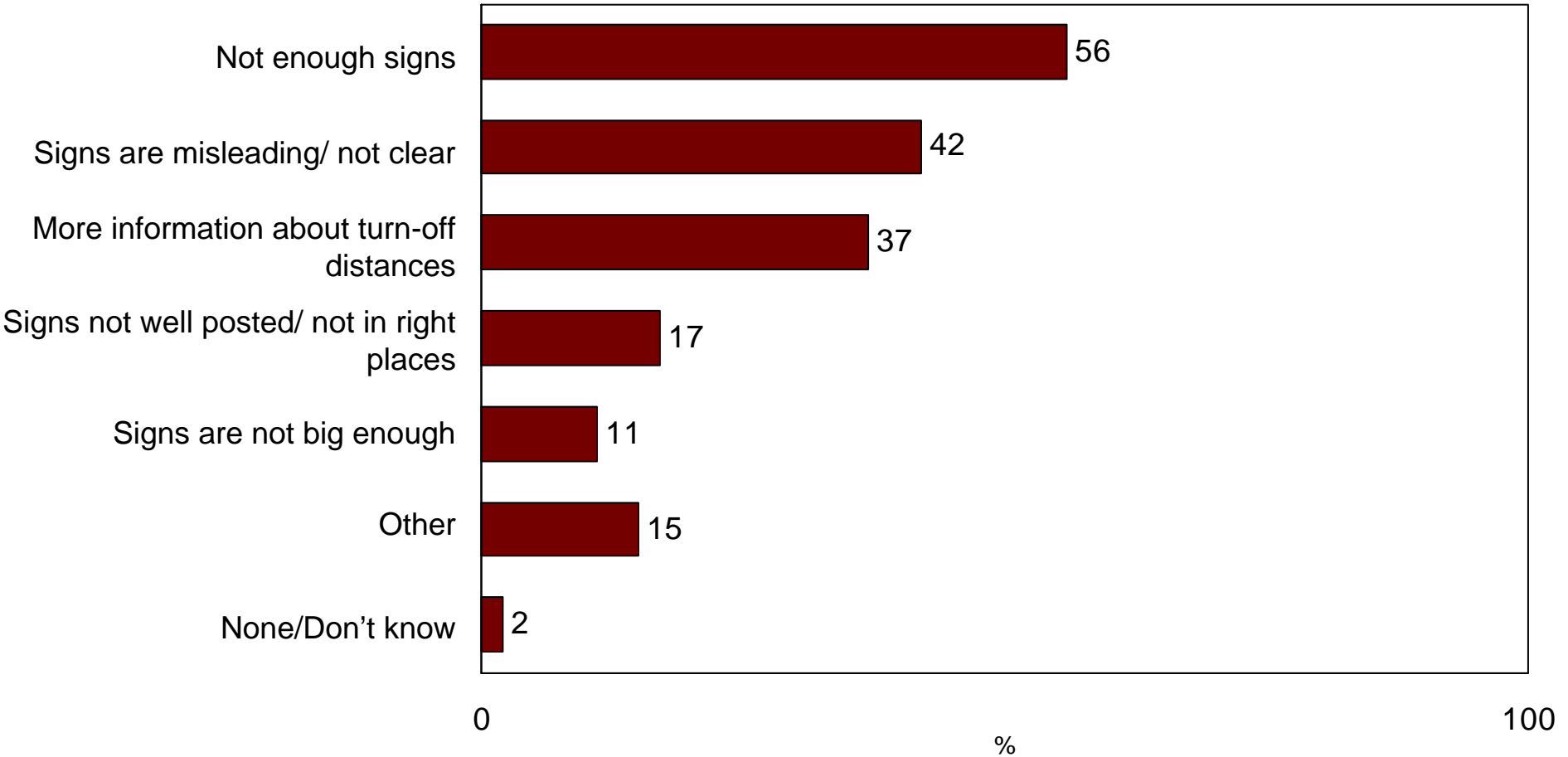
Aspects of travelling in Queensland

I would now like you to rate the following aspects of travelling in Queensland:



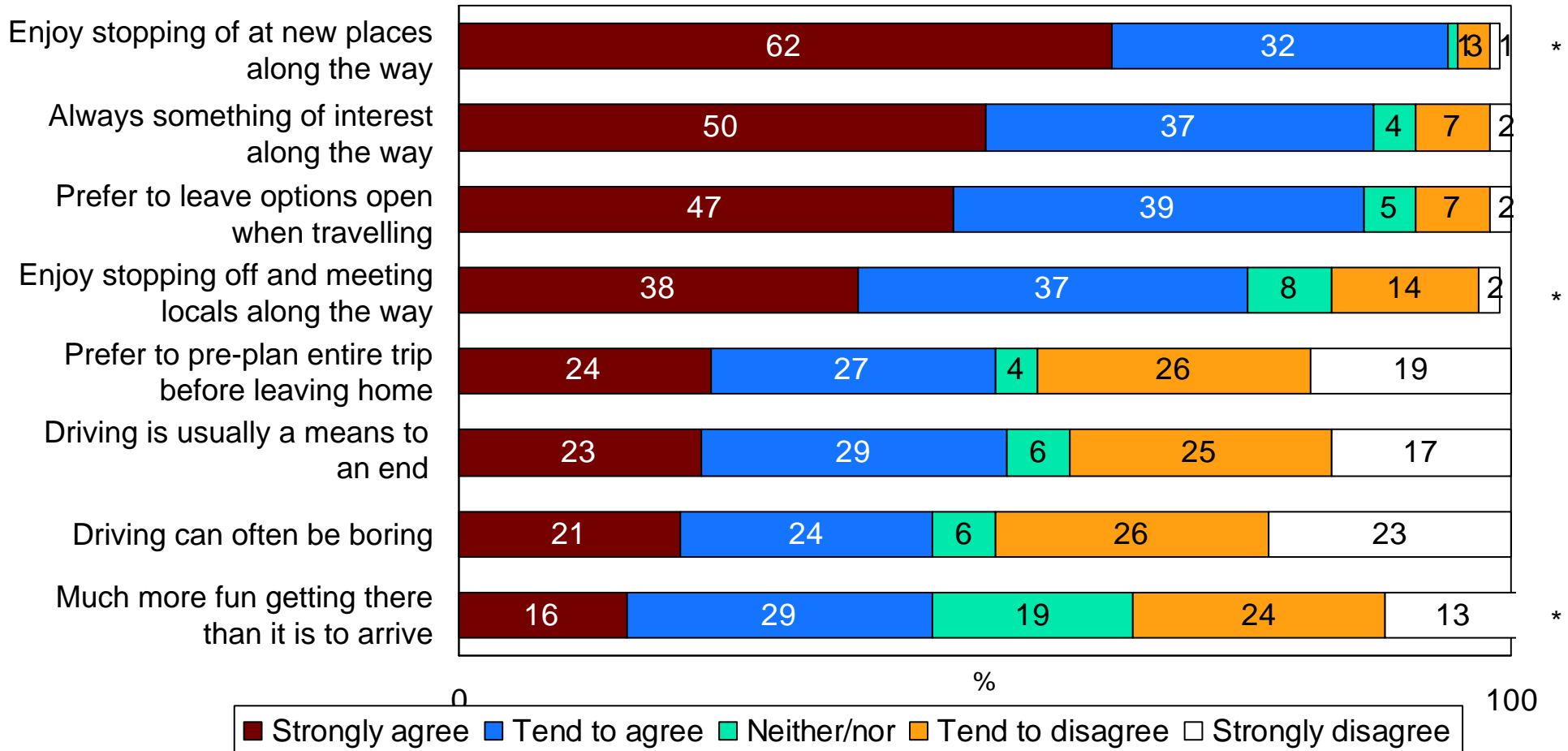
Base: Total sample (n=313) * Data does not add to 100% due to rounding differences

What did you not like about the directional signs/signs for tourist attractions?



Base: Those who rated directional signs/signs for tourist attractions as fair or poor (n=81)

The next statements relate to travelling by road on holiday:



Base: Total sample (n=313) * Data does not add to 100% due to rounding differences

Summary and Conclusions

- People have clear preferences in the amount of pre-planning they do before a road trip - this is based on personality rather than any clear demographic differences, however, road travel information should look to cater for the needs of each market segment.
- Most road travellers do an element of pre-planning with favoured sources of information being:
 - For attractions/places to visit/accommodation: Queensland Tourism, word of mouth, NRMA/RACQ/RACV and travel guides;
 - For route information: Queensland Motoring Guide, NRMA/RACQ/RACV maps, other maps (BP, Readers Digest).
- Once on the road, people are very open to new experiences and information which:
 - Comes from locals and is therefore credible;
 - Looks attractive/quality/interesting (from signage along the way);
 - Is picked up from local sources (accommodation, tourist centres).
- Indeed there is a demand for more 'locally branded' information. There is no replacement for the genuineness of receiving information from a local about their own backyard.

Summary and Conclusions (cont'd)

- People do use rest areas while they are travelling and will read information boards at these areas, HOWEVER,
- Although travellers claim that the boards may have some influence on what they do that day, the reality is that the information boards have a very low impact on ACTUAL behaviour - they are a nice diversion if people are stopping anyway but do not give a reason to stop nor are they likely to change what people do for the day.
- They may, however, give ideas for future places to visit, time permitting.
- It is the locals and those involved in the tourism industry which make the Queensland holiday experience so enjoyable rather than the road infrastructure which receives an 'average' rating at best.
- Local tourist information centres form a critical part of the road travelling experience and have the opportunity to influence decisions at all levels including the decision to stay longer in one place, whether to visit local attractions and which ones, and which accommodation places to use. Ultimately, this will influence people's decision to return to Queensland and what good word of mouth they will spread.

Summary and Conclusions (cont'd)

- What appeals more than random information boards (and in particular unmanned information boards), is a themed information system/route which offers:
 - * Pre-planning before the trip;
 - * Builds expectations;
 - * Provides security;
 - * Yet offers the adventure and exploration many travellers are looking for;
 - * Implies quality standards;
 - * Adds enjoyment to the trip.

- This system appears to merge the benefits of information boards/static displays with a far more interactive system of road signage with higher involvement from travellers while improving perceptions of quality.

- Furthermore, this incorporates the desire for a more local touch to information provision while maintaining a sense of continuity and permanence.