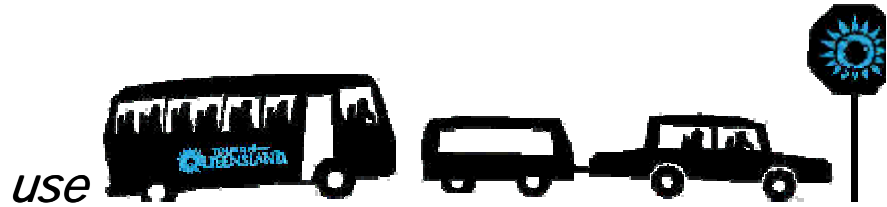


Road Travellers in Queensland

holiday planning and information



 About the Study	 Accommodation used
 Duration of last road trip	 Trip planning
 Types of road travellers	 Information sources
 Main form of transport	 Attitudes to travel
 Summary	 Disclaimer

ABOUT THE STUDY

Visitors travelling independently by road represent a very significant component of Queensland's tourism market. The National Visitor Survey indicates that about 72% of all overnight visitors use a private vehicle at some stage of their travel in Queensland.

The core purpose of this research project was to identify the means by which road travellers seek and use information in pre-trip planning and while travelling in Queensland.

313 telephone interviews were conducted with consumers who had travelled on the major coastal and Outback routes in Queensland. The origin of road travellers who participated in the study is as follows:

- Queensland = 102;
- New South Wales = 111; and

- Victoria = 100.

Interviewing was undertaken during November 1999.

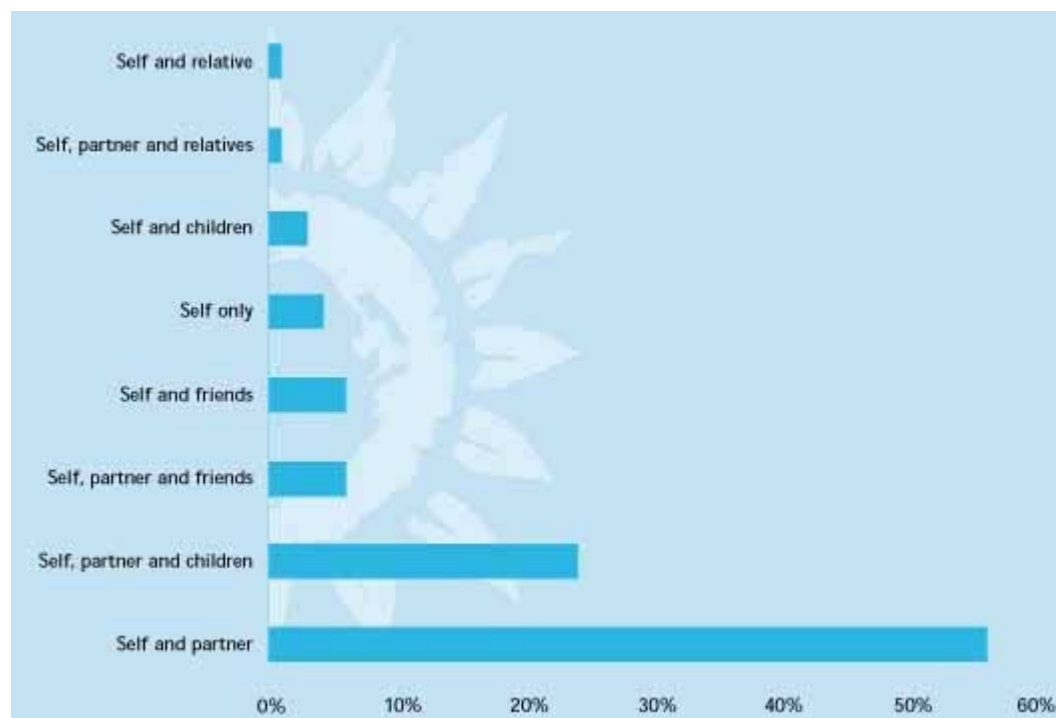


ABOUT THE SURVEY SAMPLE

To be eligible for inclusion in the survey visitors had to have travelled by vehicle along the major coastal (Pacific and Bruce Highways) and Outback Highways (Matilda, Flinders, Warrego, etc) on a trip of 400 kms or more in the last 12 months.

- Males accounted for 49% of the survey group, females 51%.
- 87% of the sample was aged 35 years or over. About half of the sample was aged 55 years and over.
- Older people and older families with no children at home represented 49% of the study group.
- Slightly more than half of the sample undertook their last road trip with a partner, 24% with their partner and children.

Travel Party

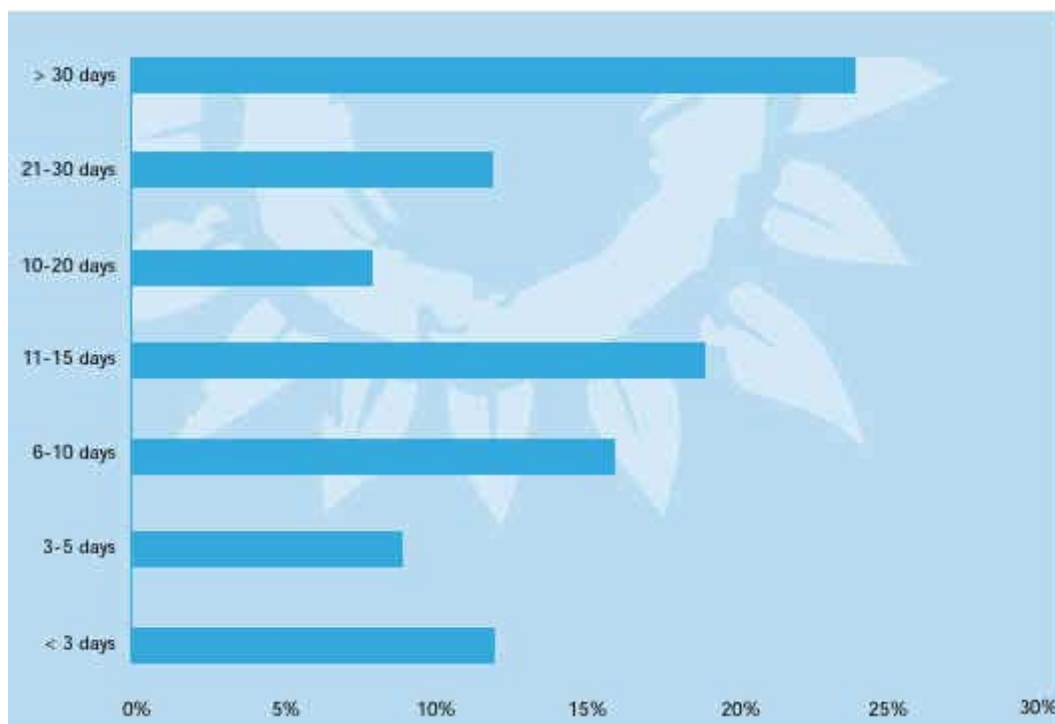


Duration of last road trip

The survey group were asked a series of questions relating to their last road trip in Queensland.

The results of the survey indicate that the average length of trip varies greatly by state of visitor origin:

- 62% of Queensland road travellers were found (on average) to take a trip of less than 10 days;
- 51% of New South Wales travellers undertook a driving holiday of more than 21 days duration; and
- 39% of the Victorian sample nominated a driving holiday of more than 21 days as being the average length of trip.
- 24% of all road travellers were found to have an average trip duration of more than 30 days.



Duration of last road trip (total average)

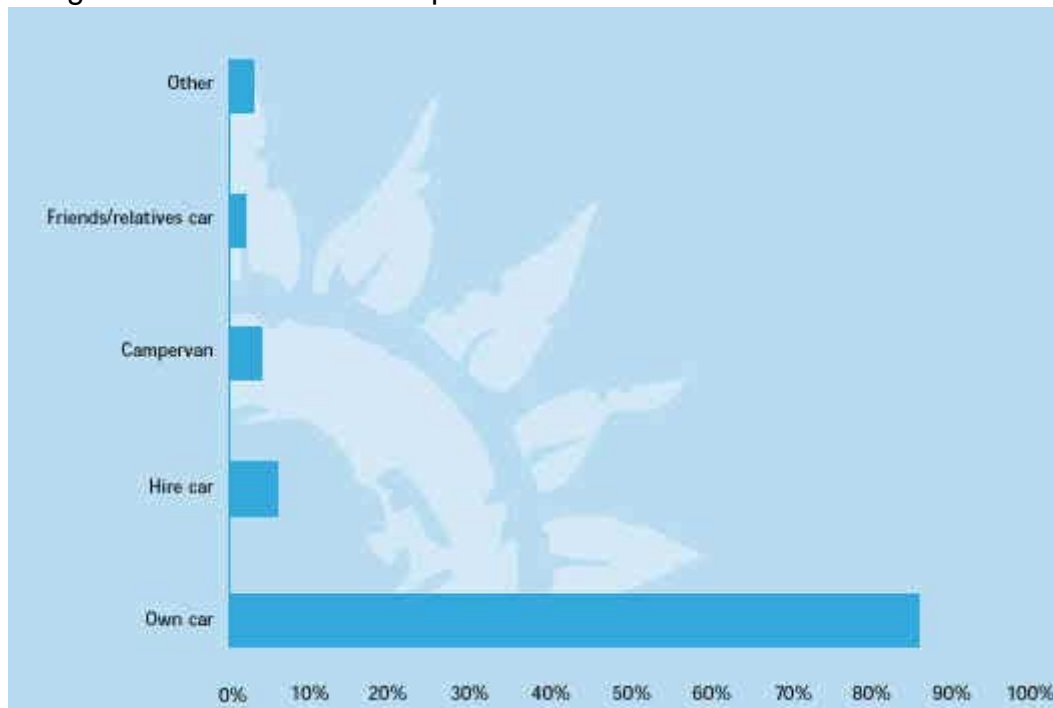
Types of road travellers

Three distinct types of road traveller were identified in the research. By far the largest segment comprises those road travel consumers who 'meander' along the road, stopping off where they please (54%), followed by those who stop merely to break the journey (37%) and those who drive straight to their end destination without stopping (9%).

The type of travel undertaken was shown to have a strong correlation with household structure. Young singles and families with school aged children participating in the study indicated that they would most likely drive straight from A to B. Young couples and pre-school families are more likely to stop off to break the journey. Older adults and older singles are most likely to take their time and stop wherever they please.

Main form of transport

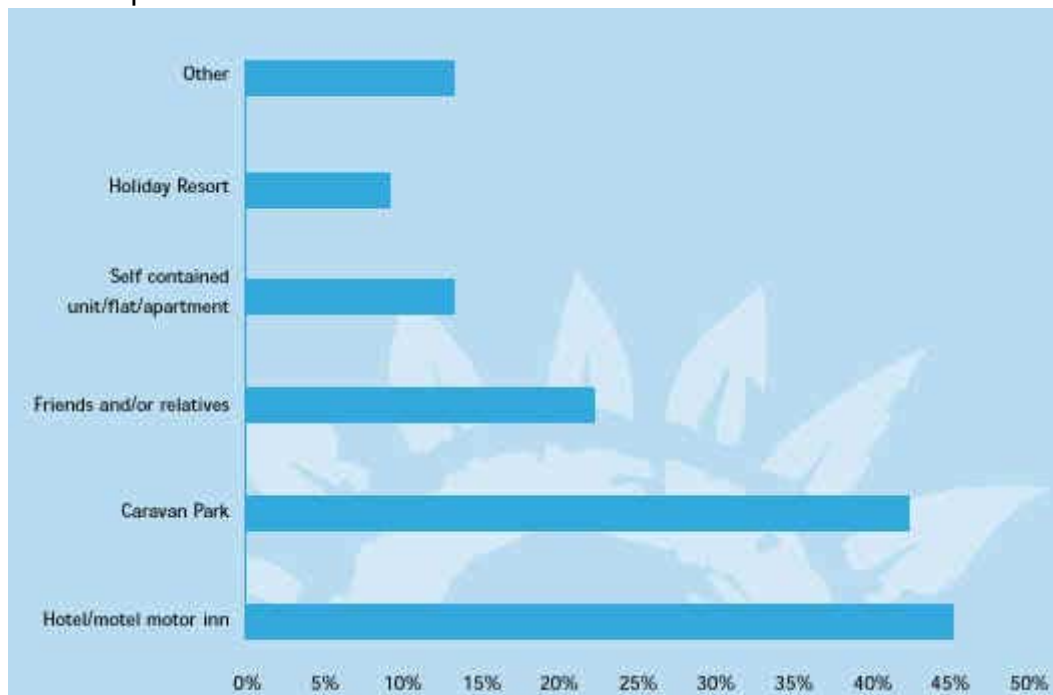
Eighty-six per cent of the those consumers participating in the survey travelled using their own car. Nineteen per cent towed a caravan.



Main Form of Transport

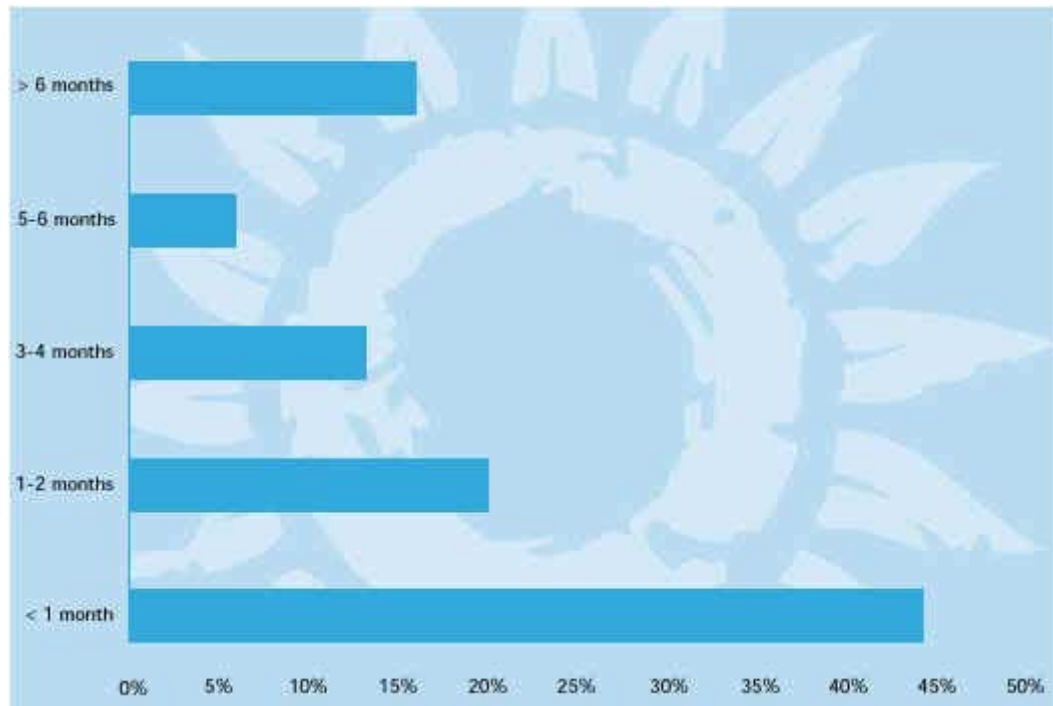
Accommodation used

Only 22% of road travellers surveyed in the study stayed with friends and relatives during their last visit to Queensland, the remainder used paid accommodation with a preference for either hotels/motels or camping, caravan parks/cabins.



Trip planning

Although 44% of road travellers spend less than a month planning for their trip, a significant minority (16%) spend more than six months in pre-planning. Time spent planning trip



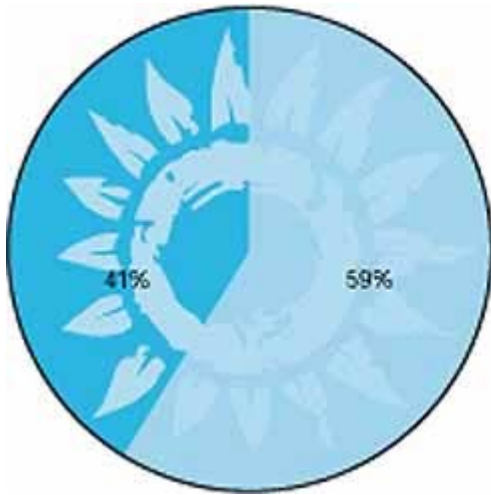
The study found that a large proportion of travel decisions are made 'on the road':

- 41% of the sample group did not plan their entire route before leaving home;
- 24% booked all their accommodation in advance;
- 29% planned all the towns they wanted to visit; and
- 20% planned all the activities they wanted to undertake.

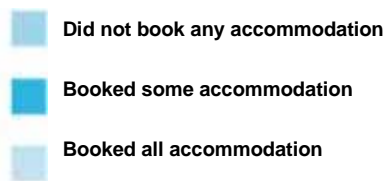
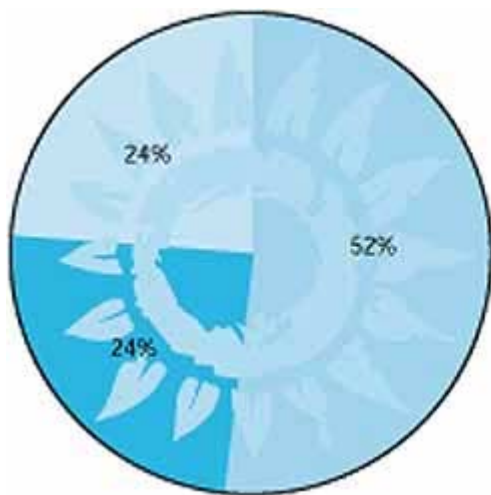
Route planning

Planned complete route

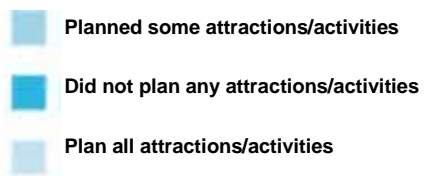
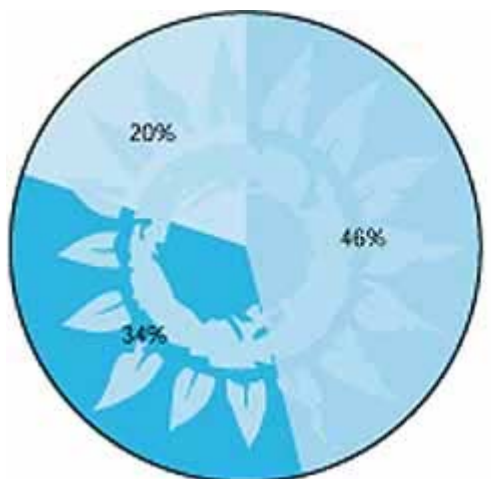
Planned some of the route



Accommodation planning



Attraction/activities planning



Information sources

Pre-trip planning

Before leaving home, road consumers were found to use a variety of information sources about Queensland. Top of the list overall is Tourism Queensland (through the Queensland Travel Centre). This was found to be a strong source of information for interstate road travellers (53% New South Wales and 41% Victoria), and is in the top three sources for Queensland residents (26%).

Another popular source of pre-travel information across all States are local motoring organisation maps:

- 63% of the Queensland sample utilised maps from the RACQ;
- 71% of the New South Wales group had used NRMA maps; and
- 66% of Victorians in the survey nominated RACV maps.

Word of mouth has a strong influence on consumer decision making and was found 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.

During trip

In terms of sourcing information relating to accommodation during the trip, local presence has a very significant impact. This includes the property itself, signage leading up to the property and the influence of local tourist information centres. Only 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 about what there is to do in the local area. Other important sources for local attractions include information materials at accommodation outlets and positive word of mouth from local people. Local signage was identified as being significant in attracting road travellers to an attraction.

In terms of sourcing directions while travelling, motoring authority maps, en-route signage and local information centres were nominated as the key sources.

When asked what type of information was missing during their trip, the importance of local knowledge is reinforced. The travellers surveyed expressed a desire for more personal recommendations and local knowledge during their travels. For many this is what travelling is all about.

Top 10 information sources used in trip planning - before leaving home

Source	%	Most useful source %
Travel brochure/information from Qld Travel Centres	41	16
Friends and relatives/colleagues	29	9
Queensland Motoring Guide	28	8
NRMA maps	28	15
RACQ maps	27	13
Travel guides/books	26	10
RACV maps	22	10
Travel brochures/information from travel agents	11	2
Internet	10	1
Prior knowledge	9	2

Top 10 information sources used during trip - for accommodation

Source	%	Most useful source %
From driving around	18	10
Local tourist information centre	15	14
Travel guides/book	13	
Signage along the way	13	3
Specific accommodations booklet	11	10
RACQ maps	11	8
Travel brochures/information from place of accommodation	9	2
Travel brochures/information from Qld Travel Centre	8	2
A person local to the area	8	4
NRMA maps	7	4

Top 10 information sources used during trip - for local attractions ,activities and places to visit

Source	%	Most useful source %
Local tourist information centre	36	32
Travel brochures collected from local information centres	23	7
Travel brochures collected from place of accommodation	22	11
A person local to the area	21	13
From just driving around	14	6
Signage along the way	14	1
Previous knowledge	11	4
Travel brochures/information from Qld Travel Centre	10	6
Travel guides/books	8	4
NRMA maps	7	4

Attitudes to travel

The majority of road travellers participating in the survey shared 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; and
- they enjoy meeting 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 versus those who are more spontaneous;
- those who believe driving is a means to an end versus those who enjoy the driving experience;
- those who believe driving can often be boring versus those who will always find something of interest; and
- those who have more fun travelling than arriving versus those who like to arrive at their destination.

There are no clear demographic differences to define these segments (although those with pre-school aged children appear to plan more), rather it is based on the personality and needs of the travellers themselves.

Aspects of travelling in Queensland

	Excellent	Very Good	Good	Fair	Poor
Helpfulness of locals	22%	36%	37%	3%	2%
Directional signs	9%	29%	41%	13%	8%
Rest stops	9%	19%	53%	15%	4%
Signs for tourist attractions	8%	28%	49%	11%	4%
Conditions of the road	8%	27%	41%	14%	10%

Summary

The research highlights the importance of 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.

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.

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