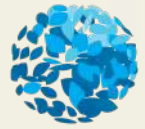


MAY 2020



EARTHCHECK

DRIVING SUCCESS

From Surviving to Thriving

Drive Tourism and COVID-19 Recovery

#WALKTHETALK

ABOUT THIS REPORT

EarthCheck is an international business advisory group which specialises in destination management and sustainable tourism. Through our Total Tourism Management™ platform, we work in partnership with clients to plan for the future and help guide the responsible management of tourism destinations and the design, construction and operation of smart buildings and infrastructure. EarthCheck has extensive experience in the development and marketing of drive tourism programs. This includes all aspects of route design including soft and hard infrastructure, experience delivery and the management of caravanning, camping and RVs.

DRIVING SUCCESS 2020

This report is designed to inspire and stimulate discussion on how to make drive tourism work for your destination in a post-COVID world. It contains some ideas on where to start planning and how to develop drive options that will deliver the best return for your community.

We welcome your feedback, suggestions and collaboration.

AUTHOR

Isabell Unger
Project Manager, EarthCheck

CONTRIBUTORS

Nigel Russell
Dr Natasha Montesalvo
Tramy Ngo

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DRIVE TOURISM

With the gradual easing of travel restrictions across the world people will once again start to leave their homes in search of fresh air and some reconnection with the outside world.

Given that international travel will remain constrained for a considerable period of time (2-3) years local and domestic tourism will provide the green shoots in a post COVID-19 environment. While it can be expected that people will initially start travelling to sites closer to home this will gradually extend to longer day trips, over night stays and then extended breaks as the wider economy opens up .

Within a short period of time drive tourism will once again become the foundation stone for travel to many destinations.

For destination managers and tourism stakeholders, this may mean a critical reassessment of your current target markets. Developing an understanding of who the drive market is within an approximate 300km radius, what the market is now seeking and how their needs can be satisfied by your region and the tourism supply chain.

“VISITORS WHO TRAVEL FOR LEISURE AND USE A VEHICLE TO REACH THEIR DESTINATION. THIS INCLUDES BOTH DAY TRIPS AND OVERNIGHT TRIPS TO ONE OR MORE DESTINATIONS.”

Tourism and Events Queensland

Drive tourism offers an opportunity to capture the imagination of a local market seeking escape from being confined at home and seeking a revived appreciation of both the outdoors and life’s simple pleasures.

As a starting point a number of considerations need to happen to support a drive program. They include revisiting and reviewing drive tourism routes, refreshing drive itineraries and the road network services on offer and providing reassurance and confidence in health and safety for travellers.

Our current research indicates that hygiene, general visitor safety and cleanliness will be front and centre for all destinations and precincts as we move into a reset and recover phase in the next six months. Spending time with family and friends will increase in importance and visiting them will be a key motivator for travel. The great outdoors are likely to boom as travellers shift their preferences and avoid crowded places and the benefits of the outdoors on mental health are realised.

Stewart Moore, CEO and Founder, EarthCheck

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ON THE ROAD AGAIN

“THEY’RE SEARCHING FOR ACCOMMODATION OPTIONS AND DESTINATION-RELATED INFORMATION THAT INCLUDES ATTRACTIONS AND LOCAL RESTAURANTS AND CAFES, SO THEY ARE READY TO TAKE THEIR NEXT TRIP ONCE THEY’RE ABLE TO DO SO,”

*Gabby Walters, Associate Professor ,
University of Queensland*

Taking your own car as the mode of transport aligns with the need for minimising exposure to strangers – this impacts the distance of travel and destinations closer to home may be favoured. Additionally, the caravanning and camping market will see signs of growth with the possibility to enjoy a holiday while keeping the interactions with other people to a minimum limit. Furthermore, the economic downturn leaves the majority of people with less discretionary income to spend on leisure activities, hence, drive tourism is an affordable alternative to long-distance, or even, international travel.

These trends are supported by a recent study from the University of Queensland[1] that reveals that more than half of Australians are keen to travel domestically after COVID-19 restrictions are eased with 50% of the travellers would prefer to drive rather than fly to destinations.

[1]

<https://www.uq.edu.au/news/article/2020/04/sunny-outlook-domestic-tourism-post-covid-19-restrictions>

DRIVE TOURISM: RECOVERY STAGES

*A Queensland
Example*



Day Trips
(radius 100km)



Intrastate
Overnight Trips
& Weekend
Trips
(radius 150km)



Intrastate and
Extended
Overnight trips
(Radius 250km)



Interstate Trips
and Themed
Touring
Routes



EARTHCHECK



ASK YOURSELF

YES NO

- | | | |
|--|--------------------------|--------------------------|
| Have you recently undertaken an audit of what drive routes exist and what services are now open? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have online collateral to support drive tourism in your region? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do your drive routes have engaging local experiences for your target markets ? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there adequate way-finding to direct visitors toward key attractions? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do the experiences and facilities along drives meet the needs of a new post-COVID-19 market who are looking for escape, wellbeing and space? | <input type="checkbox"/> | <input type="checkbox"/> |
| Will the experiences and facilities continue to meet the needs of evolving markets as restrictions ease? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do your drive routes offer products and services that promote local products and produce and are underpinned by sustainable travel values? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do your drive routes offer COVID-19 safe service and accommodation options for hygiene conscious consumers? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there sufficient data to monitor, measure and evaluate your drive campaign / strategy? | <input type="checkbox"/> | <input type="checkbox"/> |

CHALLENGES

- Willingness of consumers to travel longer distances
- In a post COVID-19 environment some attractions and accommodation options will not be available
- Need for quality roadside facilities such as rest areas, toilets and VICs
- Additional investment needed in wayfinding
- Working together with multiple agencies across borders (Key partners include local governments, RTOs, industry associations and individual tourism operators.)
- Collaborative and inclusive online promotion and marketing across borders and provision of visitor information

OPPORTUNITIES

- The Post COVID-19 traveller: domestic, self drive/ride, with campers seeking, quality camp and caravan sites, walking trails, local food and produce and no health and safety worries
- Delivers tourism dollars to regional areas, tourism dispersal
- Strong linkage to local communities
- Potential flow-on impact into the revival of international touring market - especially FIT trans-Tasman travelers
- Data insight through big data can provide specific consumer behaviour and visitation patterns to help tailor and market experiences.

CHALLENGE & OPPORTUNITY

It will be important to provide peace of mind and confidence that travel is not just safe but general community wellbeing can also be protected. There is increasing environmental awareness and demand for more sustainable and responsible travel practices.

The variety, cleanliness and presentation of rest areas, lookouts, feature walks and other drive services are important to the drive experience and comfort.

Destination management teams need to work together with road authorities and local government to undertake corridor planning.

CASE STUDY: THE WILD ATLANTIC WAY

HOW TO PACKAGE AND DELIVER A DRIVE EXPERIENCE

The Wild Atlantic Way, 1600 miles (2600 km) in length, is one of the longest defined coastal route in the world. It winds its way all along the Irish west coast from the Inishowen Peninsula in the north down to the picturesque town of Kinsale, County Cork, in the south.

EarthCheck worked with Fáilte Ireland, the National Tourism Development Authority, to develop their framework for Visitor Experience Development with Plans including the Skellig Coast, Cliffs of Moher and The Burren.

The aim of the partnership was to optimise the visitor experience and provide a framework for a national roll-out of experience plans for their three destination brands.

The plans that were developed in consultation with community, industry and agencies help identify the core 'brand promise', the unique selling points (USPs) that set the region apart and the signature experiences that deliver both the promise and the USPs.

Businesses, communities and agencies have embraced the plan, its stories and structure – generating a wealth of new publicity culminating in the Skellig Coast being recognised by the Lonely Planet as a must see destination.

"OUR RESEARCH SHOWS THAT CONSUMERS NEED BETWEEN 7-11 TOUCH POINTS TO RECALL A MESSAGE OR BRAND. THE BEST JOURNEYS HAVE AN INSPIRING STORY THAT CONNECTS THE ROUTE AND THE PEOPLE WHO LIVE ALONG IT."

Nigel Russell, General Manager, Consulting, EarthCheck



DRIVE TOURISM AT A GLANCE: AUSTRALIA

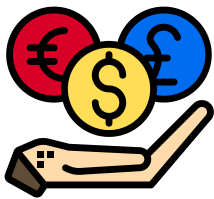


Each **Australian** over 18 yrs conducted 12 daytrips by self-drive vehicles

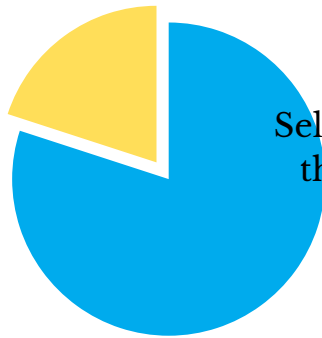
They also conducted over 4 overnight trips by self-drive vehicles



They spend an average of **\$106** for their day trip



The three most purchased items on the daytrip were:



Self-drive visitors contributed 64.3% in the total \$107 Billion consumption of domestic segment



Petrol \$27



They spent an average of **\$169** per night on an overnight trip

Meals \$25



Shopping / gifts / souvenirs \$27

BEAUTIFUL ONE DAY, PERFECT THE NEXT: QUEENSLAND

Queenslanders are the second most popular travellers using self-drive vehicles in daytrips (after Tasmania).

Each Queenslanders undertakes 13 self-drive daytrips annually on an average. They are also the second most popular travellers for overnight trips with an average of 4.5 trips annually.

In Queensland, 97% of self-drive daytrips and 85% of overnight trips are intrastate. Daytrips account for 7 in 10 self-drive trips with 3 of them being overnight.





*"Nothing behind me, everything
ahead of me, as is ever so on
the road."* Jack Kerouac



Contact Us:
info@earthcheck.org