



Understanding the Connector Market:

How does Central Queensland and the Southern Great Barrier Reef fit with Connectors' ideal domestic holiday?

Research conducted via focus groups and an online survey with Connectors within 400km of Central Queensland and the Southern Great Barrier Reef plus a boost sample of Brisbane Connectors. For further information please contact: Research@tq.com.au

The Overlap between Connectors' holiday needs and wants and what they perceive Central Queensland offers:

Activities and attractions preferred by Connectors on their ideal holiday include: beaches, rainforests, shopping, general sightseeing, markets, activities and attractions for children and day trips. Generally speaking, Connectors envisage that you can currently do these things in Central Queensland.

Holiday experiences sought by Connectors often incorporate: access to natural water, great natural attractions, safety and a great holiday atmosphere. They may also incorporate: exploring the countryside, discovering nature, water based activities, romantic getaways and having locally grown produce. Connectors already associate Central Queensland with these holiday experiences.

Core drivers behind Connectors' ideal holiday include to: rest, relax, unwind, de-stress, have fun, explore and have new experiences. Typically, Connectors think they would be able to achieve this during a trip to Central Queensland.

The Gap between Connectors' holiday needs and wants and what they perceive Central Queensland offers:

Other activities and attractions preferred by Connectors perceived to be unavailable on a trip to Central Queensland include: zoos, wildlife parks and festivals.

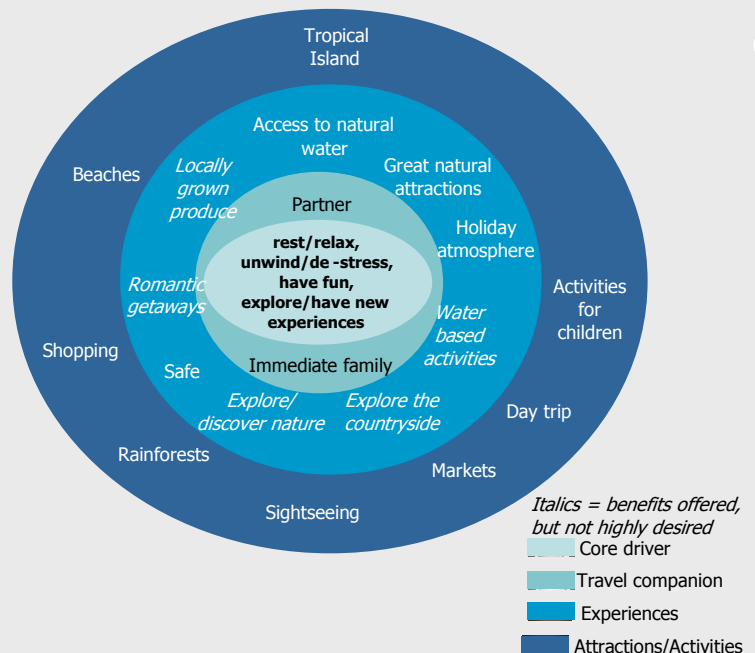
Other holiday experiences Connectors look for include: value for money, easy access, something for the kids and to escape the crowds (It is noteworthy that Connectors often associate value with an ability to exceed their expectations, opposed to just the dollar value). These experiences are not strongly associated with Central Queensland at present.

Another core driver behind Connectors' ideal holiday is to leave the cares of the world behind. This need is not strongly linked with Central Queensland.

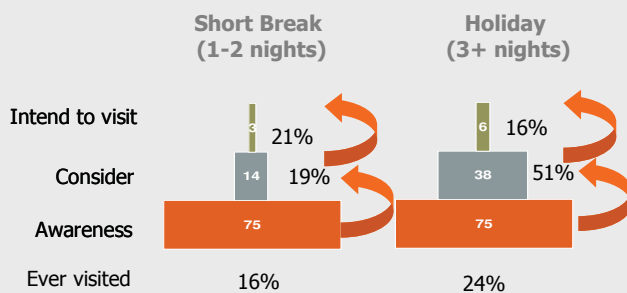
Current synopsis

Three in four Connectors are aware of Central Queensland as a destination for taking either a short break or a holiday. However, they are more likely to "consider" Central Queensland a place to visit for a holiday (three nights or more) than for a shorter break.

This diagram summarises how Connectors' ideal holiday needs and wants overlap with what they perceive Central Queensland offers. Highlighting these attributes can help motivate Connectors to "consider" or "intend" to take a trip to region.



Conversion of the model below is key to increasing visitation by Connectors to Central Queensland. This involves motivating Connectors who are aware of Central Queensland to "consider" or "intend" to take a trip there. To assist with this endeavour the research has focussed on how the region fits with Connector's ideal holiday.



Awareness is a foundation measure



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Considerations for the future...

Central Queensland is well positioned as a holiday destination. Most Connectors are aware of Central Queensland, and for most of those aware of the destination, it is in their holiday consideration set. The challenge is to convert Connectors who would consider visiting the region to actually take a trip there.

Three quarters of Connectors indicated that they are aware of Central Queensland, yet knowledge of specific places and attractions is low. This includes many with high appeal such as the Capricorn Caves, Sapphire Gem Fields, Lady Musgrave Island, Lady Elliot Island, Heron Island, Cania Gorge and Carnarvon Gorge.

Connectors perceive that Central Queensland has much to offer in terms of attractions and activities due to the large geographic region it encompasses. Therefore Connectors also tend to view the region as being more suitable for longer trips, opposed to short breaks. However, it lacks a compelling holiday proposition (experiences) which would give Connectors a stronger emotional reason to visit.

Identifying and promoting Central Queensland's unique selling points may help identify a compelling holiday proposition. While Central Queensland offers experiences that are highly appealing to Connectors such as beach and nature based experiences, perceptions of distance (size of region) and being seen as having a similar offering to home are issues to be overcome.

Key hurdles include overcoming consumers perceptions of the region as being too large and lacking in comfortable accommodation options in inland localities. Therefore communications about Central Queensland need to:

- Recommend destinations to use as a base from which daytrips could be taken;
- Reinforce the short distance between towns and attractions; and
- Raise awareness of more comfortable accommodation options available inland, those beyond camping and caravanning.

In communications reinforce where Central Queensland matches Connector's ideal holiday

