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Abstract

This paper contributes to the literature on tourism distribution by examining the distribution behaviour of 547 New Zealand outbound travellers segmented by the way in which they have made their travel arrangements: package tourists, independent travellers and an intermediate group, package plus. The results reveal differences among the three segments in terms of travel characteristics, information search, booking, and purchase, but not profile attributes or the influence of distribution on destination or product choice. Variations are also found in channel behaviour across the four different sectors examined: transport to and at the destination, accommodation, and attractions and activities.

Key words: booking, distribution, independent travellers, information search, package tourists, purchase, travel agencies, travel arrangements.

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Introduction

'Designing the distribution channel starts with determining the services that consumers in various target sectors want…' (Kotler, Bowens & Makens, 1996, p.473). This fundamental proposition is also echoed in the broader channel design literature (Stern, Sturdivant & Getz, 1993; Schoenbacher & Gordon 2002). It is therefore surprising that the consumer's voice in the rapidly growing literature on tourism distribution is relatively mute. Researchers in this field have tended to examine the roles, interests and relationships of other channel members, notably the suppliers and intermediaries (Pearce & Schott, 2005). Where research has focused on distribution related aspects of consumer behaviour, this has generally been set in related literatures, particularly those on information search and travel planning behaviour (e.g. Gursoy & McCleary, 2003; Bieger & Laesser, 2001, 2004; Fesenmaier & Jeng 2004). However, faced with an increasingly competitive environment, rapid technological change and an expanding range of available distribution channels, tourism suppliers and intermediaries need to pay closer attention to the distribution needs of their customers if they are to develop effective distribution strategies (Pearce, 2007).

It is in this context that this paper analyses the distribution channels for outbound tourism from New Zealand from the travellers' perspective. The analysis focuses on the distribution behaviour of three categories of outbound travellers based on the way in which they have made their travel arrangements: package tourists, independent travellers and an intermediate group, package plus, who combine a package with other travel. In particular, the research addresses the following questions:

- What channels are being used by these three segments?
- How are they being used?
- Why have they been selected?

- What influence has channel choice had on the destinations and products selected?

The results are drawn from a specially commissioned household survey undertaken in late 2006.

This focus on outbound travel constitutes the last phase of a major five year project examining distribution channels for New Zealand tourism. Earlier parts of the project have focused on inbound and domestic tourism (Pearce & Schott, 2005; Pearce, Tan & Schott 2007; Pearce, 2008), the sectors that have attracted the most attention from policy-makers and researchers (Pearce & Simmons, 1997; Tourism Strategy Group, 2001). However, New Zealand has also experienced a significant increase in outbound tourism in recent years due to generally favourable economic conditions, lower international airfares and population increase (Ministry of Tourism, 2006; O'Donovan & Purdue 2006). Over the period 1995-2005 short-term departures doubled to reach 1.8 million, a twofold increase on expenditure on overseas travel was recorded, and gross travel propensity increased from 25% to 45%. Increased understanding of the distribution behaviour of these travellers is thus of value to both the outbound industry in New Zealand and the destinations visited. Analysis of the patterns of use and behaviour of outbound travellers will also subsequently allow comparison with that in the other sectors and thereby contribute to broadening our knowledge of distribution from the travellers' perspective.

Literature Review

Conventionally, distribution has been thought of as either direct or indirect. Direct distribution occurs when suppliers handle all aspects of the process themselves, that is they deal directly with their customers in terms of information provision, booking and purchase.

Conversely, indirect distribution involves the use of an intermediary such as a travel agent or wholesaler to handle part or all of these functions. More recently, the advent of new technologies has also given rise to channels being classified as offline or online. Pavlides (2006) encapsulates the two approaches in a two by two matrix: direct/indirect and online/offline. Though a useful summary framework, such a matrix tends to conceal the diversity of channels used today: research has highlighted the mix of direct and indirect offline channels available (Pearce & Tan, 2006; Pearce & Sahli, 2007) and technological innovations have widened the scope of online functions and channels (Hewitt, 2006).

While certain commonalities are to be found, particularly in terms of package tourism, the studies dealing with tourism suppliers and intermediaries reveal different types of distribution mixes between and within sectors, for example accommodation, attractions, transport or events (Pearce, Tan & Schott, 2004, 2007; Pearce & Tan, 2006; Pearce & Sahli, 2007; Schott 2007; Smith, 2007). In other words, it is often no longer sufficient to refer to tourism distribution in general terms; rather, consideration must be given to the distribution of different travel products. The empirical work dealing with different facets of distribution from the demand side – information search, booking and purchase- also highlights travellers' use of varying forms of distribution depending on the type of information sought and the variety of travel products booked and purchased (Card, Chen & Cole; 2003; Wolfe, Hsu & Kang, 2004; Pearce & Schott, 2005; DiPietro, Wang, Rompf & Stewart, 2007; Jun, Vogt & Mackay, 2007; Kamarulzaman, 2007). Air tickets and accommodation are generally the most frequently purchased travel product online, attractions and activities are still commonly distributed through conventional channels.

The increasingly diverse range of direct and indirect channels available to channel members for different functions has meant tourism distribution is becoming more complex. The spatial and temporal complexity of distribution has also been highlighted by recent supply and demand side studies that draw attention to issues of the timing and location of distribution functions, differentiating activities that occur before and in transit from those carried out at the destination (Dellaert, Ettema & Lindh, 1998; Hyde & Lawson, 2003; Bieger & Laesser, 2004; Fesenmaier & Jeng 2004; Pearce & Tan, 2004; DiPietro, Wang, Rompf & Stewart, 2007; Jun, Vogt & Mackay, 2007). Particularly for independent travellers, travel decision-making is seen to be an ongoing process, though the nature and extent of the travel decisions made and the associated distribution functions required may vary throughout the different phases of the trip.

By synthesizing and re-interpreting the empirical findings from the New Zealand project in the light of the fundamental principles of distribution, Pearce (2008) developed a generalized model of tourism distribution structured around the needs (expressed in terms of time, place, form and possession utilities) of three segments of leisure travellers (independent, customized and package) and the functions (information provision, assortment, bundling and booking and purchase) required to fulfil those needs for a range of travel products (transport to and at the destination, accommodation and attractions) in three locations (in the market, en route and at the destination). Considerable scope exists to extend the ideas contained in Pearce's model by detailed empirical studies which explore in a more comprehensive fashion the patterns of distribution behaviour exhibited by market segments for a range of travel products.

To date, many demand side studies have been limited in scope, focusing on particular segments, functions, channels or products. Goldsmith, Reinecke Flynn and Bonn (1994), for example, considered heavy users of travel agents; Kamarulzaman (2007) examined the adoption of travel e-shopping; Snepenger, Meged, Snelling and Worrall (1990) and Hyde (2006) studied the information search strategies of destination-naïve travellers; while Pearce and Schott (2005) compared the information search, booking and purchase behaviour of international and domestic tourists. The studies by Hyde (2006) and Pearce and Schott (2005) dealt with independent travellers. In contrast with other parts of the distribution literature where the role of intermediaries in package tourism has been explored extensively, especially in Europe (Buhalis and Laws, 2001; Alcázar Martínez, 2002), package tourists have received less attention in terms of their distribution behaviour (Heung & Chu. 2000; Wang, Chen & Chou, 2007). Few distribution studies so far have considered multiple segments, for example, comparing domestic and international tourists or independent and package travellers.

Travel style or mode is a term used in many demand studies to classify respondents on the basis of whether they are package or independent travellers and is particularly relevant to the present research. Such classifications are typically dichotomous and subsequent analysis is usually undertaken in terms of a range of different socio-demographic variables, trip characteristics and activities (see Mehmetoglu (2006) for a useful overview). Other writers use different threefold classifications: Morrison, Hsieh and O'Leary (1994) distinguish between independent travel, escorted tours and non-escorted packages; Zhang, Qu and Tang (2004) segment according to all inclusive package, basic package tour (hotel plus air ticket) and independent travel (non-package tour).

In these studies travel style is generally treated as just another traveller attribute and distribution issues, with the exception of information search, are usually ignored. However, travel style or mode can be very useful in terms of product usage segmentation for understanding markets and how they buy. Product usage should be treated as both a primary tool and a complementary means for segmenting markets that can extend other segmentation findings (Weinstein 1994). Targeting by usage category can increase consumption by converting users from one category into another. In addition, by looking at the most frequently cited benefits, it is possible to attract nonusers or neglected segments (Weinstein, 1994).

More detailed travel style analyses of selected aspects of distribution have been carried out on Japanese travellers. Yamamoto and Gill (1999) compared the travel behaviour of Japanese package and non-package travellers and found major differences in the information sources used in planning overseas travel: tour brochures and travel agents were ranked the most important for package tourists; friends and family and travel agents were the two leading sources for non-package travellers. Yamamoto and Gill also considered the channels through which the two groups booked accommodation (but not other travel components); travel agents (93%) were overwhelmingly dominant for the package tourists and also the leading channel for the non-package travellers although to a lesser extent (37%). Direct bookings and bookings made by friends were also important. In introducing their study, Yamamoto and Gill (p.134) noted 'the categorization of tourism types is by no means straight forward'. While initially recognizing three types (escorted tours, package tours and fully independent travel), they subsequently opted for a twofold classification on the grounds that escorted tours and package tours are not necessarily exclusive and because the secondary survey data set they used did not make this distinction. Later, Nishimura, King & Waryszak (2007) examined the use of travel guidebooks by packaged and non-packaged Japanese travellers. They hypothesized that the use of guidebooks would be a function of the degree of freedom exercised in travel decision-making and classified respondents into three groups: comprehensive package tour participant, flexible package tour participant and independent traveller. Their findings supported their hypothesis, with independent travellers being more reliant on guidebooks both prior to and during travel than flexible or comprehensive package tour participants who also drew heavily on travel agents and brochures.

Bieger and Laesser (2001) took a different approach in their study of Swiss pleasure travellers, first deriving different clusters of information sources and then analysing the travel attributes of each cluster. The degree of trip packaging was found to be related to the sources of information used: those using tour operator brochures and information from travel agencies were package tourists on international trips; those using the least information were predominantly non packaged domestic travellers and those visiting friends and relatives.

In many of these demand side distribution or travel-decision making studies the emphasis is on the patterns of behaviour rather than on the underlying reasons which are usually just inferred or speculated upon rather than addressed explicitly (DiPietro, Wang, Rompf & Stewart, 2007; Jun, Vogt & Mackay, 2007). The degree of freedom in Nishimura, King and Waryszak's (2007) study, for example, was inferred from travel type (independent travellers were seen to have a greater freedom of choice) and they appear not to have questioned respondents directly on why they used one source of information over another. In contrast, Pearce and Schott (2005) explicitly examined the factors underlying aspects of distribution behaviour in their 'at destination' study of independent domestic and international visitors. Factors contributing to the low level of booking and advance purchase of attractions and activities included flexibility, a lack of planning, there being no need to book, and time-related factors. Ease and convenience was the dominant influence on channel choice. Alvarez and Asugman (2006) took a different approach by segmenting Turkish tourists according to their perception of online and offline information sources. They identified two groups, 'spontaneous explorers' and 'risk-averse planners'; the latter group were more likely to travel on a package tour than the former. Money and Crotts (2003) found national culture to be a factor in uncertainty avoidance travel planning and purchasing behaviour. Risk-avoiding Japanese travellers showed a greater tendency to pre-purchase a travel package which included more risk reducing elements than the more risk-accepting Germans who included rental cars more than any other item in the packages they bought. However, Money and Crotts did not examine the actual channels through which the different forms of travel were purchased.

In summary, faced with the growing complexity of tourism distribution many researchers have chosen to focus on a particular function, especially information search, to consider a single segment or to concentrate on an individual sector or product. What is needed now is a more comprehensive approach, one that integrates these various dimensions by considering different distribution functions across a range of segments and sectors. This is the approach taken here. The contribution made by this paper is to analyse the patterns of information search, booking and purchase across four sectors by three groups segmented on the basis of their travel arrangements. The factors accounting for the channels used in purchasing travel products are also considered.

Methodology

A nationwide household survey was deemed to be the most appropriate means of data collection to implement this approach. Such a survey enables different travel types to be drawn from the same sample frame and allows for the full range of trips taken and distribution channels used to be incorporated.

Data on the distribution behaviour of New Zealand travellers were obtained from a specially commissioned nationwide telephone survey undertaken by an established national survey research firm using computer assisted telephone interviewing (CATI). The survey was administered to a randomly selected quota sample of 1,000 New Zealand residents over the age of 18 who had taken either an overseas or domestic trip (of two or more nights) within the last 12 months. Participants were telephoned at their homes on weekdays, evenings and weekends between November 20 and December 17, 2006. They were informed of the confidential and voluntary nature of the study; a $500 travel voucher draw was used as an incentive to encourage a higher response rate.

Random digit dialing was used to derive a representative national sample. One thousand interviews were completed, an effective response rate of 10.5%. Of these, 547 provided details on their most recent overseas trip lasting two or more nights in which they were involved in the planning (the results relating to the domestic travellers are to be reported elsewhere).

When checked against national migration statistics for short-term departures from New Zealand the sample was found to be largely representative along a variety of dimensions. In terms of the regional propensity for outbound travel, five regions are slightly underrepresented, six regions are slightly overrepresented and the remaining four representative. The sample very closely approximates the pattern of international departures in terms of destinations visited. Just under half of the respondents (49.4%) had Australia as their main destination compared to 50.4% of departures. Respondents travelling to the United Kingdom, however, were over-represented (12.2% compared with 4.6% of departures). The mean trip length of the sample (19.6 days) is virtually identical to that of the population (19.5 days).

The questionnaire was structured around an introductory set of questions relating to the trip characteristics of the respondents' last overseas trip, followed by the main set relating to their distribution behaviour and concluding with profile questions. As one of the key objectives of the study was to examine distribution behaviour across a range of functions (information search, booking and purchase) and travel components (transport to and at the destination, accommodation, attractions and activities) consideration had to be given to keeping the questionnaire to a manageable length, especially as it was a phone survey. This resulted in respondents being asked to answer the questions with respect to the main destination they travelled to, the main channels they used and so forth. In the case of information sources, they were asked to give the two main sources of information used. Each interview took on average just under 18 minutes to complete. The majority of the questions were open. A pilot study of 50 interviews was conducted to pretest the questionnaire for clarity with minor revisions subsequently being made. The results from the pilot survey also assisted the researchers in developing a coding frame used in the CATI process. The coded data file was then made available to the researchers who analysed it using SPSS.

The analysis and subsequent presentation of the results is structured around the distribution behaviour of outbound travellers segmented by the way in which they made their travel arrangements (Figure 1). The term 'travel arrangements' is preferred here to travel style as it better reflects the functions of distribution, especially bundling, that is the way in which and extent to which the various different products of a holiday or trip (transport, accommodation, attractions ...) are combined into a package or set of customized arrangements (Buhalis, 2001; Pearce, 2008). Given the focus of this study, it is particularly appropriate to segment respondents by travel arrangements as a means of analysing other aspects of their distribution behaviour.

A threefold segmentation has been adopted whereby respondents were self-classified into one of three categories based on their response to the question: 'Which of the following best describes how you travelled on your last overseas trip:

- All my travel arrangements were booked as part of a package (including activities and attractions);
- Some of my travel arrangements were part of a package and some were made independently (package plus);
- I made all my travel arrangements independently.'

Package plus travel might involve a trip in which a package tour is complemented by additional travel arranged independently, for example, someone visits friends and relatives after a scheduled tour or stays on after a conference to do their own touring around. Alternatively, package plus might involve a basic air travel- transfers- hotel package with attractions and activities arranged independently. An additional question established whether the package was a group or personalized package.

[Insert Figure 1 about here.]

The analysis begins by exploring the profile and trip characteristics of these three segments before examining in more detail the channels they have used to make their travel arrangements (Figure 1). The ways in which the travel arrangements are made are considered with regard to the channels outbound travellers use for three functions of distribution: information search, booking and purchase (Buhalis, 2001; Pearce & Schott, 2005). Particular attention is given to the last two functions. Following Pearce's (2008) needs-function model, the analysis examines these functions with regard to the four main classes of travel products or trip components: transport to the destination, transport at the destination, accommodation and attractions and activities. The distinction between transport to and at the destination has largely been neglected in previous studies but is crucial as it often involves different modes and costs and thus, *a priori*, different patterns of distribution. The distribution of packages is also considered. The analysis establishes the patterns of distribution behaviour and examines why travellers use the channels they do for selected functions. Some of the analysis involves all three segments (Tables 2, 3 and 8); in other cases it concerns just two, notably Table 4, which relates to the booking and purchase of packages, and Tables 5 to 7, which compare the behaviour of package plus and independent travellers on the assumption that all the components for the package tourists have been incorporated in the package and thus covered in Table 4. Statistical differences in the patterns of the different segments are tested using chi-square, and, when the data did not meet the assumptions of this test (notably there were more than 20% of the cells of the table with expected frequencies less than 5), the significance level for the likelihood ratio (LR) is reported (Cavana, Delahay & Sekaran, 2001).

Results

Almost 70% of the 547 respondents declared they had made all their travel arrangements independently; 10.6% said all their arrangements were booked as part of a package and the remaining 19.9% were classified as package plus travellers. These three categories are retained for the purposes of the analysis but as the subsequent results show, in some cases the divisions between the package and package plus segments is not quite as sharp as the survey question anticipated, highlighting some difficulties in operationalizing travellers by their travel arrangements.

The package tourists were split reasonably evenly in terms of group tours (51.7%) and personalised tours (48.3%). Almost two thirds (64.2%) of the package plus tourists had opted for a personalised tour.

Profile characteristics

Previous research on travel styles suggests different segments may vary by socio-demographic characteristics (Mehmetoglu, 2006). However, no significant differences across the three segments of New Zealand outbound travellers were found in terms of age, gender, residential locality (city, town, rural) or access to the Internet (Table 1). Significant differences did occur in the occupational groupings of the three segments: there are proportionately more retired respondents in the package segment; professionals in the independents (perhaps a function of business travel) and various classes of workers (service and trade; agricultural, trade and other workers) in the package plus category.

[Insert Table 1 about here.]

Trip Characteristics

In contrast to the profile attributes, significant differences were found in the trip characteristics of the three travel segments (Table 2). In terms of main destinations visited, package tourists are over-represented in travel to the short-haul tropical destination of Fiji and in long haul tours to Europe; package plus tourists are over-represented in trips to the long haul destination of the United Kingdom and under-represented in travel to the main short-haul destination of Australia; independent travellers are slightly over-represented in Australia but otherwise their distribution follows the general pattern of the total sample.

Overall, 70% were making a repeat visit to the destination they had travelled to. A distinct relationship is found between previous visits and the type of travel arrangements made. Just over a half of the package tourists were visiting the destination for the first time while three quarters of the independent travellers were on a repeat visit; the package plus segment constitutes an intermediate group (37% were first time visitors).

With regard to purpose of visit, just over half of the respondents were on holiday, just under a third was visiting friends and relatives (VFR) and the remainder were on business (12.1%) or travelling for some other purpose (4.4%). The patterns of the three segments follow those that might be expected: the large majority taking a package are on holiday; package plus tourists on holiday are also over-represented, but to a lesser extent; and there are proportionately more independent travellers visiting friends and relatives than in the total sample.

The average length of stay of the package tourists (11.7 nights) was markedly shorter than those of the other two segments (package plus 20.8; independent 20.5).

[Insert Table 2 about here.]

Travel Arrangements

Information search

Much travel planning begins with an information search phase (Gursoy & McCleary, 2003). While not the prime focus of this study, respondents were asked to name the two main sources of information that they used for finding out about each of the classes of travel products they required (Table 3). Table 3 shows major differences occur between the main sources used by package tourists and independent travellers. Some variation is also found in the sources used for information about different sectors.

For the package tourists, the travel agent is the dominant source of information for each set of products. For the independent tourists, the Internet is the main source of information about transport to the destination, accommodation and, to a lesser extent, transport at the destination. However the Internet is only ranked third by this segment as a source of information about attractions and activities. Previous experience and word of mouth are the other two most commonly used sources of information, with brochures ranked second overall for attractions and activities. Information obtained directly from the provider was the fifth ranked source of information for both forms of transport. With regard to Internet usage, however, it is unclear just whose sites are being used as the respondents were not requested to specify this level of detail; conceivably much of Internet usage might involve the providers' own sites. In terms of their patterns of information search, the package plus travellers often constitute an intermediate group between the package and independent travellers. They are also distinguished in Table 3 by having brochures as their leading source of information about attractions and activities.

[Insert Table 3 about here.]

Booking and purchase

Table 4 compares the behaviour of the two package segments with regard to how they booked and purchased their package. Significant differences were found between the package and package plus tourists in terms of how they booked their package but not in terms of the channel they used to purchase their package and the reasons for making their purchases in the way they did. The majority of package plus tourists booked their package in person (58.7%) or online (23.9%). Many package tourists also booked their package in person (41.4%); others did so by phone (31%) or online (20.7) (Table 4:a). Both segments overwhelmingly used travel agents or travel management companies to purchase their package (Table 4:b). Both segments also cited several factors of relatively equal importance regarding their choice of provider: price; previous relationships; good reliable service; ease and convenience; and other factors (Table 4:c).

[Insert Table 4 about here.]

Table 5 compares the behaviour of the package plus and independent travellers with regard to how they booked the different components of their trip. Significant differences between the two segments occurred in terms of transport to the destination and accommodation but not for transport at the destination nor attractions and activities. The majority of the package plus tourists booked their transport to the destination in person (56.7%) while almost half (48.8%) of the independents booked online. For both segments bookings in person of transport at the destination were the most common, but not so dominant, followed by online and phone bookings. Just under half (48.8%) of the package tourists booked their accommodation in person while just over half (53.7%) did so online. The majority of both segments booked their attractions and activities in person, followed by online or phone bookings.

[Insert Table 5 about here.]

Significant differences occur in the purchasing behaviour of the package plus and independent travellers across all four sectors (Table 6). For all four components travel agents constitute the most important channel through which package plus travellers purchase their products, particularly transport to the destination and accommodation. In the case of transport at the destination and attractions and activities the travel agent's role decreases as direct purchases from the provider or other intermediaries (e.g. visitor information centres) also become important. With the exception of transport to the destination, where the travel agent remains the single largest channel, the main channel used by independent travellers is direct purchase from the provider, particularly for transport at the destination and attractions and activities. The travel agent is still an important channel for these other sectors. Airlines are only a very minor channel for the distribution of products from other sectors. The Internet is also shown in Table 6 to play only a secondary role for both segments in most sectors, though again it is not clear from the survey what proportion of the purchases through other channels is being made online.

[Insert Table 6 about here.]

The respondents offered a diversity of reasons why they chose the channels they used to make their purchases (Table 7). No single factor is dominant but ease/convenience and price are the top ranking reasons given. Price is the most commonly cited reason for transport to the destination, perhaps a function of the cost of this component, and the second-ranked factor overall for the other three components. Ease and convenience is the leading factor overall for the other three components, accounting for a third of the responses for transport at the destination and attractions and activities. Previous relationships with the channel member and service/referral are the next most commonly occurring reasons given for all but the attractions and activities sectors. Significant differences occur between the reasons given by package plus and independents across all four sectors. The independents tend to be more price conscious in their channel choice; depending on the sector the package tourists give greater weight to previous relationships or the component being part of the package. In principle, on the basis of their response to the travel arrangements question, independent travellers should not have had any package components at all; in practice, the small percentage of independents who did have may have been referring to complimentary products included with other ones they had purchased (e.g. attractions included with hotel accommodation or a rental car with international travel).

[Insert Table 7 about here.]

Influence

Finally, an attempt was made to assess the impact of the way in which the travel arrangements were made on the choice of the destination or particular travel components. No previous research appears to have addressed this issue but it is an important one for suppliers and intermediaries. To this end, respondents were first asked: 'Did your decision to make **all** your travel arrangements in this or these ways influence **your choice of destination'**? This was followed by similar questions relating to each component along the lines 'Did the way in which you made your travel arrangements influence your choice of accommodation'? Table 8 suggests that the way in which travel arrangements were made had little influence on the choice of the destination or the individual components with the vast majority of each segment answering 'no' to these questions. Significant differences across the segments were found only with respect to accommodation where a greater proportion of package plus travellers indicated it did have an influence. The results in Table 8 suggest that from the consumers' perspective the decision is between the choice of channels to book and purchase selected destinations or travel products with the channels used having little influence on the actual selection of these.

[Insert Table 8 about here.]

Those respondents who answered these questions positively were then asked follow-up questions seeking explanation of the type of influence such as: 'In what way or ways did they influence your choice of destination'? While a small proportion indicated that the channels used offered more or fewer choices- an expected dimension in line with the assortment function of distribution- the majority of respondents who answered these questions gave replies relating to more general factors such as price, ease and convenience or knowledgeable travel agents, where the connection with the destination or travel component chosen is less evident. This suggests the respondents may not have fully understood the question. It is also possible that consumers are unaware of the extent to which the assortment of products made available to them by various intermediaries is limiting their selection – wholesalers' catalogues, for example, generally contain a selection of products at a given destination rather than a full inventory (Pearce, Tan & Schott, 2004; Pearce & Tan, 2006).

Discussion, implications and conclusions

This research has underscored the importance of examining the distribution behaviour of outbound travellers and highlighted differences among the three travel arrangement segments across a number of dimensions of travel characteristics, information search, booking and purchase but not, with some minor exceptions, in terms of profile attributes or the influence of distribution on destination or product choice (Tables 1 to 7). While some commonalities occur, package tourists, package plus travellers and independents exhibit different types of behaviour. In terms of information search, for instance, travel agents are the dominant source for package tourists, the Internet is more important for independents and the package plus segment constitutes an intermediate group. Package plus travellers have a greater tendency to book in person, use travel agents as the main channel to purchase components from all four sectors and, with the exception of the more expensive item of transport to the destination, cite ease and convenience as the leading factor in their channel choice. Independents have a greater propensity to book online, depend more heavily on direct purchases, and, while also citing ease and convenience in channel choice, are often more price-conscious than the package plus travellers.

The survey results also draw attention to the variations in channel behaviour across the four different sectors examined. In particular, many of the findings highlight differences between transport to and at the destination, clearly indicating the importance of differentiating transport in this way. Several factors may account for these differences. As noted above, transport to the destination is generally a much more significant component of the overall trip cost, especially in the case of outbound travel from New Zealand which usually involves a minimum of at least three hours air travel. While domestic air travel may be needed at the destination, much at destination travel may involve other modes (rental cars, tour coaches, public transport, taxis ...) or be limited in extent in the case of city or resort based trips. Well developed distribution linkages generally exist between international and domestic air travel but not between air travel and other modes with the exception of online connections to rental cars. Transport to the destination needs to be accessed in the market; transport arrangements at the destination are not necessarily required until arrival and are frequently made once the destination is reached.

These findings also confirm the need for suppliers and intermediaries in developing their distribution strategies to take account of the marketing implications of the factors which underlie travellers' channel choice (Pearce 2008). The diversity of channels used and the range of factors influencing travellers' behaviour suggest multi-channel distribution strategies will continue to be needed to meet consumer preferences. Whatever the channels employed, particular attention must be given to the ease and convenience with which they can be used, a finding which corroborates the earlier study of Pearce and Schott (2005) with regard to inbound and domestic independent travellers in New Zealand. While price is a key factor, the stated importance of previous relationships and service and referrals underscores the need for excellent and tailored customer service in developing and maintaining channel loyalty.

Further implications for suppliers and intermediaries arise from the differences noted between the three segments based on their travel arrangements. In particular, the results draw attention to the bundling function of distribution. At present, travel agents in New Zealand retain a competitive edge in selling travel where some element of packaging is required in which all or most of the travel components are bundled together, either in preset or more customized packages. In line with earlier work (Mehmetoglu 2006), such travel has been found to be more important to first time travellers than repeat visitors and for travel to particular types of destinations (e.g. Fiji). More emphasize might be given to stressing the ease and convenience of packaged travel in marketing such products to these travellers or destinations. Independent travellers, at present the largest segment of outbound travellers from New Zealand, do use travel agents but also favour booking online and direct purchases from providers. In response to these trends, the larger travel agencies in the country are now developing online booking services.

The three-pronged segmentation approach proposed here reflects changing buying and travel patterns, where travellers are seeking more customization. It is possible that clients in either one of the two extremes may be 'moved' into the package plus category if additional benefits are highlighted (e.g. that such packages are customized, easy to book and purchase and boast flexibility, depending on traveller needs and wants). Package buyers, for example, might be targeted with an attempt to shift some travel purchases into the 'package plus' category where longer, more customized trips may yield higher margins for intermediaries than a simple 12-day group package.

A crucial factor in the evolution of the distribution of outbound travel will be the ways in which and extent to which the bundling of different travel products will be facilitated by the improvement of dynamic packaging systems that allow users to readily assemble all their preferred travel products online (Green, 2005; Cardoso, 2006). To date, Air New Zealand is the leader in dynamic packaging in this market but the extent of this activity is still limited, as is the role of airlines in distributing products other than air travel (Table 7). However, technology in this field is evolving rapidly and who captures this share of the market will have a major impact on distribution channels for outbound tourism in the near future.

The segmentation of outbound travellers on the basis of their travel arrangements and the differences revealed has also highlighted the need for further research in this area. The findings suggest that a simple independent/package dichotomy is no longer adequate for many purposes for there would often appear to be no neat twofold division between these categories given the real world complexities of international travel. The package plus category appears to be a useful intermediate class. An argument might also be made for an 'independent plus' class on the basis of some of the results obtained (Table 7), the difference between these two intermediate classes depending on the balance of the package or independent components of the trip. As Yamamoto and Gill (1999) also noted, challenges clearly exist in terms of operationalizing travel arrangements segmentation. The *a priori* segmentation based on self-declaration adopted here has provided many new insights into the distribution behaviour of outbound travellers but is not without some minor inconsistencies (Table 7). Future research might be directed at developing various approaches to the segmentation of travel arrangements, comparing, for example, self-declaration, with *a posteriori* segmentations based on analyses of the booking and purchase patterns of travel products.

However, as Weinstein (1994) has noted, and as was found in this study (Table1), one of the drawbacks of product usage segmentation is that it is often difficult to explain segments through traditional demographics. More research is now needed to elaborate on the non-demographic variables that influence purchase decisions; the key is to tap into these influencers. The results presented here suggest more attention could be directed at the needs of the different segments and the benefits provided by different channels. The work of Alvarez and Asugman (2006) and Money and Crotts (2003) also indicates psychographic profiling of the travel types would also be useful, exploring such constructs as spontaneity and risk-aversion.

Further research is also needed on the distribution of outbound travel from other markets in order to test the generality of the findings presented here and to determine the influence of market and destination characteristics and the impact of other variables. Similarities and differences are seen when the results reported here are compared with those on Japanese travellers (Yamamoto and Gill, 1999; Nishimura, King & Waryszak, 2007). In both countries package travellers depend heavily on travel agents but guidebooks are a less influential source of information for New Zealanders than the Japanese. The patterns reported here reflect those of a small national market experiencing rapid growth and one from which all outbound travel is overseas travel. What, for example, are the patterns of distribution behaviour in those markets where international travel involves a large element of overland travel to adjoining neighbours.

Future research might also be undertaken to analyse the influence of travel arrangements on destination and product choice. The exploratory research reported in Table 8 has raised some interesting issues but needs to be taken further. Such research might reverse the approach taken here and incorporate the role of distribution explicitly in the broader destination and product choice process rather than take, as in this study, a distribution focus and consider the impact of that on destination and product choice. In this way, the influence of distribution might be gauged more directly against other factors such as destination image, price and accessibility.

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Figure 1: Analytical framework for examining the distribution behaviour of outbound travellers

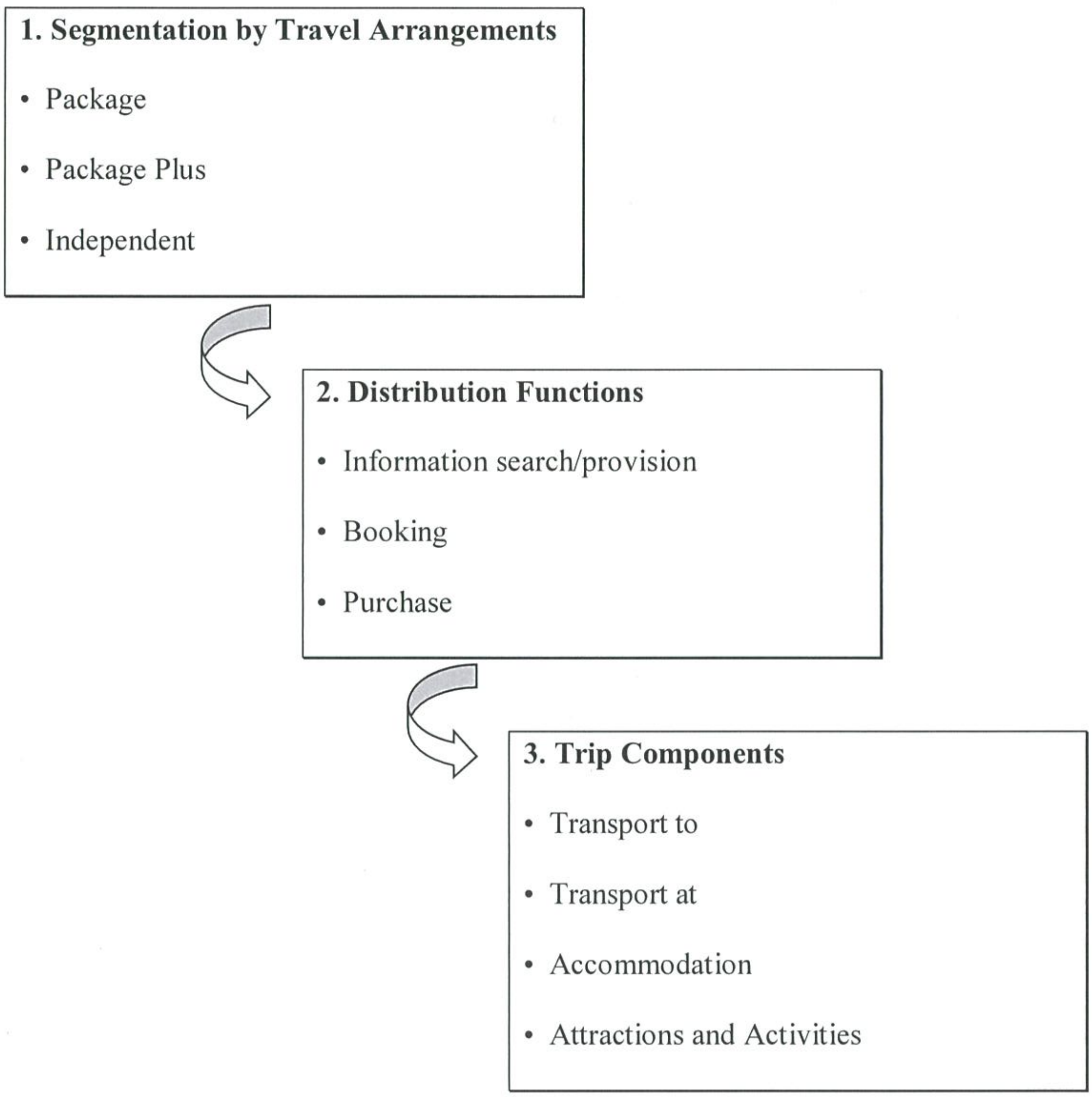

Table 1: Respondent profile attributes statistics

Characteristic	x^2	df	p
• Age	20.755	12	0.054
• Gender	0.868	2	0.648
• Locality	2.225	4	0.694
• Internet access	2.746	2	0.253
• Occupation*	34.548	20	0.023
*LR			

Table 2: Travel arrangements and trip characteristics

Characteristics	Package (n=58)	Package Plus (n=109)	Independent (n=380)	Total (n=547)
Destinations (p = .000)	%	%	%	%
Australia	43.1	37.6	53.7	49.4
Fiji	17.2	7.3	4.5	6.4
United Kingdom	3.4	16.5	12.4	12.2
USA	6.9	5.5	5.8	5.9
Europe	8.6	1.8	2.9	3.3
Other	20.7	31.2	20.8	22.9
First/Repeat Visit (p = .000)				
First	51.7	37.6	25.3	30.5
Repeat	48.3	62.4	74.7	69.5
Purpose of Visit (p = .000)				
Holiday/leisure	77.6	58.7	47.4	52.8
VFR	6.9	25.7	35.8	30.7
Business	8.6	11.0	12.9	13.1
Other	6.9	4.6	3.9	4.4
Type of Package (p = .046)				
Group	51.7	35.8		
Personalized	48.3	64.2		
Length of Stay				
Nights (mean)	11.7	20.8	20.5	19.6

Table 3: Travel arrangements and main sources of information used

Information Source	Package	Package Plus	Independent	Total
Transport To (n=504)	%	%	%	%
Internet	24.1	18.3	47.1	39.0
Travel Agent	55.6	47.1	24.3	32.0
Previous experience/ personal knowledge	20.4	26.9	28.3	27.0
Word of Mouth	14.9	17.3	21.4	20.0
The Provider (incl. airline)	13.0	19.2	17.6	18.0
Transport At (n=355)				
Previous experience/ personal knowledge	14.3	27.9	28.6	27.0
Internet	16.7	11.6	29.5	24.0
Word of Mouth	19.0	16.3	23.8	21.0
Travel Agent	45.2	27.9	10.6	19.0
The Provider	9.5	12.8	11.9	12.0
Accommodation (n=390)				
Internet	15.7	15.9	44.2	34.0
Previous experience/ personal knowledge	15.7	25.0	25.5	24.0
Travel Agent	51.0	34.1	12.0	22.0
Word of Mouth	17.6	18.2	22.3	21.0
Brochures	11.8	21.6	7.2	11.0
Attractions & Activities (n=256)				
Word of Mouth	20.5	21.9	34.0	29.0
Brochures	17.9	29.7	21.6	23.0
Previous experience/	12.8	25.0	19.0	20.0

personal knowledge				
Travel Agent	33.3	25.0	5.9	15.0
Internet	0.0	6.3	19.6	13.0

Table 4: Main method of booking/purchasing packages

Booking/Purchasing Method	Package (n=58)	Package Plus (n=109)	Total (n=167)
a. How did you book your overseas package? (p = .026)	%	%	%
In person	41.4	58.7	52.7
Online	20.7	23.9	22.8
Phone	31.0	12.8	19.2
Other	6.9	4.6	5.4
Totals	100.0	100.0	100.0
b. Who did you purchase your package from? (p = .541*)			
Travel agent/travel management company	86.2	80.7	82.6
Airline	6.9	5.5	6.0
Other	1.7	7.3	5.4
Directly from operator/supplier	3.4	3.7	3.6
Tour wholesaler/outbound tour operator	1.7	2.8	2.4
Totals	100.0	100.0	100.0
c. Why did you decide to purchase your package from this provider? (p = .472)			
Price related - best deal/discount	22.4	21.1	21.6
Previous relationship with provider	1.6	23.9	20.4
Good service, reliable	20.7	13.8	16.2
Easy/convenient	12.1	17.4	15.6
Other	19.0	12.8	15.0
Someone else purchased it/ booked by someone else	8.6	5.5	6.6
Referral/recommendation	3.4	5.5	4.8
Totals	100.0	100.0	100.0

* LR			

Table 5: Main methods of booking trip components

Component	Package Plus	Independent	Total
	%	%	%
• **How booked travel to** (p = .000)	(n=104)	(n=346)	(n=450)
Online	23.1	48.4	42.9
In person	56.7	35.8	40.7
Phone	16.3	14.7	15.1
Other	3.8	0.6	1.3
Totals	100.0	100.0	100.0
• **How booked travel at** (p = .422)	(n=81)	(n=212)	(n=293)
In person	48.1	40.6	42.7
Online	23.5	33.0	30.4
Phone	23.5	20.8	21.5
Other	4.9	5.7	5.5
Totals	100.0	100.0	100.0
• **How booked accommodation** (p = .000)	(n=86)	(n=242)	(n=328)
Online	23.3	53.7	45.7
In person	48.8	22.7	29.6
Phone	22.1	19.8	20.4
Other	5.8	3.7	4.3
Totals	100.0	100.0	100.0
• **How booked attractions & activities** (p = .969)	(n=64)	(n=153)	(n=217)
In person	56.3	57.5	57.1
Online	18.8	16.3	17.1
Phone	14.1	13.7	13.8

Other	10.9	12.4	12.0
Totals	100.0	100.0	100.0

Table 6: Channels used to purchase trip components

Channel Used	Package Plus	Independent	Total
	%	%	%
• **Who purchased transport to destination from** (p = .000)	(n=104)	(n=346)	(n=450)
Travel agent	76.9	43.1	50.9
Airline	10.6	38.7	32.2
Directly from operator/supplier	3.8	8.1	7.1
Via the internet	1.0	6.6	5.3
Other	7.7	3.5	4.4
Totals	100.0	100.0	100.0
• **Who purchased transport at destination from** (p = .000)	(n=86)	(n=227)	(n=313)
Directly from operator/supplier	30.2	49.8	44.4
Travel agent	36.0	14.5	20.4
Other	14.0	17.6	16.6
Other intermediary	15.1	5.3	8.0
Airline	2.3	7.0	5.8
Via the internet	2.3	5.7	4.8
Totals	100.0	100.0	100.0
• **Who purchased accommodation from** (p = .000)	(n=88)	(n=251)	(n=339)
Directly from operator/supplier	12.5	42.6	34.8
Travel agent	62.5	22.3	32.7
Other	11.4	13.9	13.3
Via the internet	2.3	15.9	12.4
Other intermediary	9.1	1.6	3.5

Airline	2.3	3.6	3.2
Totals	100.0	100.0	100.0
• **Who purchased activities and attractions from** (p = .000*)	(n=64)	(n=153)	(n=217)
Directly from operator/supplier	20.3	51.6	42.4
Travel agent	43.8	18.3	25.8
Other intermediary	23.4	13.1	16.1
Other	7.8	10.5	9.7
Via the internet	4.7	4.6	4.6
Airline	0.0	2.0	1.4
Totals	100.0	100.0	100.0
* LR.			

Table 7: Reasons for choosing channel used to purchase trip components

Reasons	Package Plus	Independent	Total
	%	%	%
• **Transport to destination** (p = .001)	(n=104)	(n=346)	(n=450)
Price related	23.1	32.9	30.7
Easy/convenient	18.3	22.3	21.3
Previous relationship	22.1	14.2	16.0
Service/referral	11.5	9.5	10.0
Air points	2.9	8.1	6.9
Part of package	10.6	2.0	4.0
Offered best route	1.9	2.9	2.7
Other	9.6	8.1	8.4
Totals	100.0	100.0	100.0
• **Transport at destination** (p = .001)	(n=86)	(n=227)	(n=313)
Easy/convenient	34.9	34.4	34.5
Price related	14.0	25.1	22.0
Previous relationship	12.8	9.7	10.5
Service/referral	8.1	8.8	8.6
Part of package	15.1	2.2	5.8
Other	9.5	11.5	10.0
Don't know	4.7	8.8	7.7
Totals	100.0	100.0	100.0
• **Accommodation** (p = .001)	(n=88)	(n=251)	(n=339)
Easy/convenient	31.8	26.7	28.0
Price related	12.5	22.7	20.1

Previous relationship	14.8	13.9	14.2
Service/referral	9.1	7.6	8.0
Part of package	15.9	2.8	6.2
Individual choice	3.4	4.8	4.4
Proximity to event/destination	1.1	5.2	4.1
Someone else booked	3.4	2.0	2.4
Totals	100.0	100.0	100.0
• **Activities and attractions** ($p = .114$)	(n=64)	(n=153)	(n=217)
Easy/convenient	29.7	35.9	34.1
Price related	17.2	13.1	14.3
Part of package	20.3	7.8	11.5
Recommendation/referral	6.3	9.8	8.8
Flexibility/spontaneity	7.8	7.8	7.8
No choice/only way to book	7.8	4.6	5.5
Previous relationship	3.1	3.3	3.2
Other	7.8	17.6	14.7
Totals	100.0	100.0	100.0

Table 8: Influence of channel arrangements on selection of destinations and trip components

% saying travel arrangements have NO influence on choice				
Dimension	**Package**	**Package Plus**	**Independent**	**Total**
	%	%	%	%
• **Destination** (n=547; p = .243)	86.2	81.7	87.9	86.5
• **Package** (n=167; p = .114))	81.0	69.7		
• **Transport to** (n=525; p = .110)	87.7	73.8	79.5	79.2
• **Transport at** (n=521; p = .571)	88.0	84.0	87.5	86.9
• **Accommodation** (n=512; p = .006)	79.2	71.0	84.7	81.3
• **Attractions & Activities** (n=495; p = .175)	86.8	86.1	91.8	90.1