BACKPACKER TRAVELLERS IN SOUTH AUSTRALIA
A study of itinerary planning

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TECHNICAL REPORTS

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ABSTRACT

This report examines issues relating to the process of itinerary planning by 'backpacker' travellers with respect to South Australia and other less visited states and territories in Australia. A total of 96 semi-structured face-to-face interviews were conducted with visitors to Australia staying in hostel or backpacker accommodation in Melbourne and Adelaide in January and February 2007. The report describes the profile of backpacker visitors to South Australia and their decision processes. The report also provides conclusions and recommendations with respect to itinerary linkages, product development, regional dispersal and communication strategy.

Acknowledgements

SUMMARY

Objectives of Study

The primary aim of the research was to examine itinerary planning by backpacker travellers with respect to less visited Australian States and Territories - in particular South Australia.

Methodology

To meet the research objectives semi-structured face-to-face interviews were conducted with 96 backpacker travellers in Adelaide and Melbourne in January and February 2007. The interviews were conducted by trained and accredited interviewers from the Ehrenberg Bass Institute for Marketing Science at the University of South Australia.

The interview was based on a structured questionnaire that incorporated closed and open ended questions and a picture sort using a set of 17 images of relevant experiences and activities. The distribution of responses, where presented in the report, cannot be generalised to the broader population of backpackers due to the sampling and interview procedures.

Key Findings

Visitor profile

The research found that backpackers visiting South Australia (SA) travel widely in Australia during their trip. Of those interviewed in Adelaide, more than 90% had visited or intended to visit New South Wales, Queensland and Victoria while around two thirds had visited, or intended to visit the Northern Territory and the same proportion had visited or intended to visit Western Australia.

The majority of the backpackers visiting South Australia were staying in Australia for six months or more and stayed in South Australia for less than one week. Most of the respondents (70% in Adelaide and 78% in Melbourne) were intending to work in Australia. A minority (15%) had undertaken some study in Australia—in most cases short duration English courses.

Their trip to South Australia was generally linked to the Great Ocean Road (59% of Adelaide respondents and 43% of Melbourne respondents visiting South Australia) and/or the outback (most commonly Alice Springs/ Uluru—29% of Adelaide respondents and 11% of Melbourne respondents visiting South Australia). Only 10% of those interviewed in Adelaide travelled to South Australia by air—although a number of those who travelled overland were continuing their journey by air to Perth, Alice Springs/Uluru or the eastern seaboard.

Motivation to visit and decision processes

While there was some awareness of and interest in South Australian destinations such as Kangaroo Island, the Barossa and Coober Pedy, South Australia was not a strongly branded destination from an itinerary planning perspective and was seen to lack 'must see' attractions by some respondents. Adelaide for many was a stop over or transition point within the respondent's broader itinerary to the Northern Territory or Western Australia from the eastern seaboard (or vice versa). There was however a significant proportion of travellers who specifically wanted to see Adelaide and South Australia (around one-quarter of those interviewed in Melbourne who were visiting South Australia) with many visitors saying they enjoyed the 'laid back' charm of Adelaide.

More broadly, the respondents expressed a desire to see the iconic sights of Australia; to experience the Australian beach lifestyle; and the romance and adventure of a drive touring experience through the Australian outback.

The research suggests that while most backpackers will have decided to visit South Australia prior to their arrival in Australia, a significant proportion (25%) made the decision to visit South Australia at some point during their stay in Australia. For the longer stay visitor, flexibility is important and accommodation, transport and tours are booked as they travel. (They may book flexible bus or train passes prior to arrival that will determine transport mode). There is therefore the opportunity to influence travel both to South Australia and within South Australia following arrival in Australia.

For Melbourne respondents who were not visiting South Australia the reasons most commonly given were:
- lack of awareness
- lack of time.

Future Action

The research suggests the following strategies could contribute to the development of the backpacker market in South Australia.

Link to Great Ocean Road

A significant proportion of the backpackers (59% of those in Adelaide and 43% of those in Melbourne who had visited or were intending to visit South Australia) had travelled or were intending to travel on the Great Ocean Road (GOR). There was evidence that some backpackers had become aware of the GOR following their arrival in Australia and had changed their itinerary to access this experience.

From a market development perspective it is important that South Australia is linked to the GOR. Relevant product in this context includes caving and cave diving; the coastal villages of Robe and Beachport; the unspoilt nature and Aboriginal culture of the Coorong.

As many backpackers appear to be aware of, and interested in Kangaroo Island, this could also be linked as a logical end point or goal for a drive experience into South Australia from the GOR.

Link to the outback

Almost one-third of the visitors interviewed in Adelaide and 11% of those interviewed in Melbourne who had visited or were visiting South Australia stated that their trip to South Australia was directly linked to a visit to the outback (some of the other travellers may have visited the outback at a different stage of their trip i.e. they may have flown directly from the east coast).

As a component of the interview respondents were shown a set of 17 images and asked to pick out the six images they most liked and sort them in order of preference. The image that was most frequently identified over all preferences was a vehicle traveling in the outback at sunset while the second most popular image for those visiting Adelaide was a group of friends on a road trip standing in front of an 'Aussie' road sign in a remote outback area. The image of the outback is a potent symbol for many backpackers and represents the core of the Australian experience.

While symbolically important, in numeric terms the outback does not deliver as many backpacker visitors to South Australia as the link to the Great Ocean Road. Adelaide is however for many travellers the 'gateway to the outback' and South Australia's connection to the outback experience should be encouraged through product development and cooperative activities with other tourism and promotional bodies.

When asked directly to describe their impressions of the outback the respondents were most likely to describe it in terms of the desert imagery i.e. hot, dry, huge distances, emptiness—and the icons of Alice Springs, Uluru, the Olgas and Kings Canyon—the Red Centre. For the majority the outback is the Red Centre.

The outback was not perceived as dangerous although it offers challenge for those interested in the historic outback trails such as the Oodnadatta and Strezlecki Tracks.

For South Australia perhaps the best opportunity for the state to 'own' a distinctive component of the outback experience, given current travel patterns and product awareness, is Coober Pedy and the Oodnadatta and Strezlecki Tracks for the more adventurous. While awareness and interest in the Flinders Ranges is weak, in the longer term product development (around cycling and bushwalking) and improved access to this region may result in the area becoming more attractive to backpacker travellers— particularly given proximity to the Stuart Highway.

Kangaroo Island

There was reasonable awareness for Kangaroo Island (KI) and an interest in visiting amongst respondents. One individual had formed an intention to visit KI while at home in England after seeing images of sand surfing.

Kangaroo Island has the potential to represent a 'lead' product for the backpacker market in South Australia—it offers an authentic experience of Australian nature in an environment that has yet to be discovered and exploited by the mass tourism industry[1]. The lack of development and tourism infrastructure should be attractive to backpackers—particularly the experiential traveller.

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[1] Some backpackers appear to be attracted to the west coast of Australia due to the perceived lack of development when compared to the east coast. The same motivation would also apply to Kangaroo Island.

Some respondents felt that Kangaroo Island was similar to other island experiences in Australia and did not offer a significant point of difference. Positioning for this destination should, where possible, differentiate it from other popular island destinations with similar attributes such as Fraser and Rottnest Islands. Images of swimming with sea-lions at Baird Bay were associated with Kangaroo Island by a number of respondents.

Product development

For many backpackers itinerary planning is based on specific activities and experiences. Activities in South Australia that may provide a foundation for product development include the following:

Aboriginal culture

While backpackers express an interest in experiencing Aboriginal culture in a genuine and respectful way the response to the image of Aboriginal dancing was not overwhelming (See Chapter 7)[2]. There was, however, a considerable difference in response between the Melbourne and Adelaide respondents with 15 Adelaide respondents rating this image in their top six compared to five in Melbourne. This may reflect a more experiential/discovery orientated motivational profile for the Adelaide sample—the Melbourne sample also provided 25 ratings for rock climbing compared to 16 for the Adelaide sample suggesting these respondents were more adventure-focused.

The best opportunities to access the backpacker market will be for product that is geographically located along existing transport routes e.g. Coorong Wilderness Lodge and the Pitjantjatjara Lands adjacent to the Stuart Highway. The challenge will be to build awareness of these experiences at a point where travellers are in a position to consider visiting or to incorporate this into the itineraries of tour operators.

The Aboriginal Cultures Gallery at the South Australian Museum is the best collection of Aboriginal artifacts in Australia and should be promoted as such.

Caving and diving

As a world heritage listed attraction, the Naracoorte Caves will be of interest to some visitors en route from Melbourne. Opportunities for cave diving in the south east of South Australia could also attract visitors into South Australia. Places such as Ewen Ponds provide an accessible cave diving experience that is unique to the region without the need for specialist diving equipment and accreditation.

Cycling

Cycling was attractive to some respondents and the cycling trail in the southern Flinders Ranges represents an opportunity although it may need to be packaged, given that the region is not on a direct touring route through the outback (at least via the Stuart Highway).

Rock climbing

Rock climbing was an attractive image although it tends to be more strongly associated with the Grampians and the Blue Mountains than South Australia. There are opportunities for climbing in the Adelaide Hills that would represent an attractive day trip from Adelaide for adventure orientated backpackers.

Shark diving

The set of 17 images that respondents were asked to rate included an image of a diver in a cage photographing a great white shark. This image received a total of 12 first preference ratings (12%) mostly from males. Shark diving is attractive to sections of this market and is strongly associated with South Australia. While the cost of this experience will be a barrier for most backpackers the market includes more affluent travellers known as 'flashpackers[3]' who save money where possible on accommodation and transport but will participate in activities with a price premium that attract them.

Swimming with seals and sea-lions

The imagery of swimming with seals and sea-lions was attractive to the respondents and is also strongly associated with South Australia although many associated this experience with Kangaroo Island (where this experience cannot

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[2] The backpacker research conducted by the Charles Darwin University found that backpackers are interested in Aboriginal culture but this must be done in the right way – it must be authentic.

[3] Hammond, P. 2007.

be accessed). As Baird Bay is not on a backpacker touring route, the dolphin swim opportunity along the coast of Adelaide may be a better option in regard to this experience (although it could be packaged with shark diving and other activities from Port Lincoln for the 'flashpacker').

Wine tasting

Wine production is strongly associated with South Australia by this market. There are a number of tour operators providing day trips to the wine regions from Adelaide and demand may currently be satisfied. The wine tasting experience should continue to be linked to a visit to South Australia and Adelaide—particularly in the context of the social aspects of the backpacker experience.

Regional dispersal

Backpackers in the main travel by public transport and transport networks will to a significant extent determine regional dispersal. The increasing availability of low cost air travel has influenced travel patterns on the eastern seaboard[4] and many backpackers (such as the 'flashpackers') will travel to destinations serviced by discount carriers rather than put up with long journeys by bus or train. The availability of direct flights from the eastern seaboard to Pt Lincoln could have a significant impact on backpacker travel to the Eyre Peninsula.

There is a considerable interest in visiting the Red Centre and many backpackers travel overland along the Stuart Highway and bypass the Flinders Ranges. There was low awareness of the Flinders Ranges amongst the travellers interviewed for this research and it may be the case that outback travellers could be encouraged to spend some time in the Flinders through the packaging by transport operators of activities such as cycling and bushwalking.

The other major determinant of regional dispersal is the availability of employment. A significant proportion of the backpackers interviewed in Adelaide (70%) were working while in Australia. Almost half (47%) has sought or were intending to seek agricultural work in regional areas to extend their visas and South Australia was associated with fruit-picking and grape-picking.

Communication

Target market

The backpacker segment most likely to visit South Australia consists of longer staying travellers who will be visiting Australia on a working holiday visa. In 2005 to 2006 there were 113,935 visitors to Australia under the Working Holiday Maker Visa (Subclass 417) with these visitors most likely to come from the UK (25%), Korea (21%), Ireland (11%) and Germany (11%)[5]. When compared with the number of working holiday visas issued in 2001 to 2002 visitors from Korea have grown by more than 600%; visitors from Germany by more than 100%; while visitors from the UK have fallen by 30%. Working holiday visas are attractive to Koreans as an alternative to student visas due to higher cost and restrictions on capacity to work and education service provider that apply to an education purpose visa. It is understood that working holiday visas are actively promoted by education agents in Korea.

When compared to the shorter stay east coast backpackers, who tend to be motivated by physical activities, adventure and opportunities to socialise, visitors to South Australia will be more experiential with a desire for authentic cultural and nature based travel experiences. The Northern Territory has also identified the experiential traveller as their primary target market segment[6].

Experiential travellers may see the lack of development in South Australia and the outback as a distinct advantage when compared to the eastern seaboard. There was some evidence that lack of perceived development was an advantage for Western Australia and this could also apply to South Australia. Experiential travellers may also see their trip to Australia as an opportunity for personal growth and self-discovery which is consistent with more remote destinations.

South Australian visitors will be more likely to travel overland, linking with the Great Ocean Road and/or the outback. They will be attracted by the romance of an Australian road trip and the adventure and freedom associated with traveling through the outback.

A secondary market segment consists of the so-called 'flashpackers'. These travellers are more affluent and while saving money on accommodation and transport will spend on tours and activities that interest them. Specialist product such as shark diving and guided bushwalking etc. could be attractive to this market.

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[4] Charles Darwin University. 2006.

[5] Department of Immigration and Multicultural Affairs. www.immi.gov.au/media/statistics/study/tempentstat.htm

[6] Tourism Northern Territory. 2007. Experiential backpacker is defined as 'travellers who want to get out and about in order to enrich themselves on a personal level through interactive nature based and cultural experiences'.

A further niche market consists of overseas students studying in states outside South Australia who will take time off to travel through Australia at some stage during their stay. As many will be in Australia for a period of time before they travel, there will be opportunities to raise awareness of South Australia through the educational institutions or related information networks.

Positioning

South Australia's main problem is lack of awareness and familiarity[7]. Familiarity is influenced through passive learning in the pre-purchase phase and representation through word of mouth, TV documentaries, magazine editorial, etc. The best chance of raising awareness of South Australia in origin markets is through linkage with iconic Australian experiences such the Great Ocean Road, the Ghan and the outback. As web sites with consumer generated content become more popular informal communication will also assist in raising awareness of South Australia. In the longer term Kangaroo Island and possibly the Flinders Ranges have the potential to represent lead nature based experiences for this market. Images associating South Australia with the drive touring experience should also be encouraged.

The Internet

The Internet has become increasingly important as an information source and as a booking mechanism. While planning their trip, backpackers will visit government web sites such as Australia.com, immi.gov.au; backpackvictoria.com; travel portals for flights and accommodation; agent sites such as statravel.com; sites for work and travel such as workandtravel.com.au, gapyear.com; and CGM[8] sites such as GetJealous.com.

Word of mouth

Many backpackers are highly social as they travel and WOM will influence decisions regarding their itinerary and product usage during their trip. Prior to their trip they will be influenced by friends and relatives who have visited Australia in the past. CGM web sites represent a form of word of mouth communication and are increasingly important although still accessed by a minority of backpackers[9].

Guide books

While guidebooks are not as pervasive as they may have been in the past[10] a significant proportion of respondents were using guide books as a basis for itinerary planning, accommodation and tours both before and during their trip.

Brochures and magazines

Backpackers will make limited use of brochures to book tours and attractions directly with the operator or through their hostel. These are typically sourced from their place of accommodation and Visitor Information Centers in some instances. T&T magazine was also mentioned as a source of information about things to see and do.

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[7] There is research (Baloglu, 2001; Prentice, 2004) to suggest that broad familiarity is more important in determining destination choice than a differentiated destination image.

[8] Consumer Generated Media.

[9] Hayward, 2006.

[10] The research conducted by Charles Darwin University found that guide books may be carried during their trip but are less likely to be referred to for accommodation and attractions than in the past.

Chapter 1

INTRODUCTION

This report investigates issues relating to the backpacker travel market in South Australia. Specific objectives were identified by the industry partner in South Australia, the South Australian Tourism Commission (SATC).

The specific objectives of the research were:
- to develop an understanding of itinerary planning by backpacker travellers with respect to less visited Australian States and Territories—in particular South Australia
- to determine variations in these procedures on the basis of relevant independent variables including country of origin; age group; tour groups etc.
- to deliver research findings and recommendations in a form that will provide a foundation for the development of a strategic plan for the backpacker sector in South Australia.

To meet the objectives a total of 96 semi-structured interviews were conducted with backpackers staying in hostel accommodation in Melbourne and Adelaide over the period 22 January to 12 February 2007. The interviews were conducted by trained and accredited interviewers from the Ehrenberg Bass Institute for Marketing Science at the University of South Australia. Interviews were conducted at the following hostels:

Adelaide
- Adelaide YHA
- Backpacker OZ
- My Place Adelaide
- Travellers Inn

Melbourne
- Melbourne YHA
- Base Backpackers
- Coffee Palace Backpackers
- Urban Backpackers

For the purposes of the research a 'backpacker' was defined operationally as a foreign national aged between 18 and 35 years staying in a backpacker lodge or hostel.

The data collection was undertaken using a semi-structured questionnaire with a mixture of open ended and closed questions. The questionnaire was reviewed following the completion of the Adelaide interviews and a number of coded response categories were incorporated. The interviews conducted in Melbourne were therefore more structured when compared to the interviews conducted in Adelaide.

Percentages are reported in some instances, however, these results cannot be generalised to the broad population of backpacker travellers due to the small sample size and the sampling procedure.

Chapter 2

BACKGROUND

While the number of backpackers in Australia has grown considerably over the last 20 years it has stabilised somewhat in the wake of September 11, 2001 and patterns of distribution appear to have changed with backpackers less inclined to stray from the established touring routes along the eastern seaboard[11].

While demand on the eastern seaboard has returned to levels of demand experienced prior to the events of September 11, 2001 more remote destinations such as South Australia, the Northern Territory and Western Australia have not experienced the same level of growth and backpacker travellers appear to be less interested in visiting the 'outback' regions of Australia.

Considerable data regarding the international backpacker market has been compiled by Tourism Australia and the South Australian Tourism Commission, from the results of the International Visitor Survey[12], however there is less information available regarding backpacker decision processes, particularly as they relate to the more remote regions.

In the recent past Charles Darwin University[13] has undertaken a substantial research project on behalf of the Tourism Northern Territory in regard to the backpacker market that involved quantitative analysis of the International Visitor Survey plus extensive qualitative research in Australia and overseas. Key insights from the research are as follows:

- The backpacker market in Australia consists of two main geographic segments—the 'East Coast' and whole of Australia.
- The 'East Coast' is primarily Sydney to Cairns (although may also include the Great Ocean Road). This market is shorter stay and more lifestyle orientated i.e. beach/nightlife/socialising and more structured.
- Backpackers visiting the whole of Australia are more experiential and interested in exploring all that Australia has to offer including the outback. This market is longer stay, more dispersed, less structured, more mature.
- The experiential traveller wants activities and experiences—not just sightseeing. Experiences must be authentic. They are interested in Aboriginal culture but this must be done in the right way.
- Backpackers in the main travel by public transport and the role of transport availability and cost are critical in itinerary planning. In particular, destinations serviced by discount air carriers have prospered.
- Due to the desire to access cheap flights these components of the itinerary will be pre-booked well in advance which will influence flexibility of itinerary planning.
- Over ground transport is acceptable for the East Coast but less so for remote destinations.
- Itinerary planning tends to be framed around activities then the destination—what can I do there?
- Itinerary planning is increasingly structured—i.e. 'The plan is no plan' is less applicable to the backpacker market than previously thought—particularly for remote destinations such as the Northern Territory.
- Work and study opportunities will dictate itinerary choices for some backpackers.
- Voluntary work in national parks or with Aboriginals etc. is attractive to older, experiential travellers.
- Outback visitors are holiday/leisure purpose visitors—less likely to be visiting Australia for work/education.
- Consumer Generated Media[14] (e.g. Blogging) is an increasingly important information source for itinerary planning.
- Backpackers are less likely to use guide books when traveling within Australia—they may carry them but are less likely to refer to them than in the past.
- Awareness and opportunities for South Australia include: Great Ocean Road; Kangaroo Island; Gateway to the Outback.
- As the market is activity focused there is a need to package experiences rather than destinations.

The Charles Darwin University research found that backpackers may feel they can satisfy their interest in nature based and cultural experiences without the need to travel long distances from the eastern seaboard. The research distinguishes between trip planning and trip phasing. Trip phasing is said to relate to the experiences desired by backpackers at different stages of their trip and in different locations.

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[11] South Australian Tourism Commission, 2006. Backpacker Fact Sheet. www.tourism.sa.gov.au

[12] Tourism Research Australia, 2006. International Visitor Survey. www.tourism.australia.com

[13] Charles Darwin University, 2006.

[14] Hayward, E. (2006). This report concludes that CGM is still in its infancy and information from these sites is regarded as only partially reliable.

Chapter 3

RESPONDENT PROFILE

The survey results presented below describe the demographic characteristics of the respondents and their travel behavior. The distribution of visitor origin, age and gender for the survey respondents is presented below in Table 1.

Table 1 Place of Origin, Age Group and Gender by Interview Location

Interview location/ Respondent origin	F 18–24 yrs	F 25–34 yrs	M 18–24 yrs	M 25–34 yrs	Total
Adelaide					
UK	22%	5%	12%	23%	16%
Ireland		5%	8%	4%	4%
Germany	7%	5%	15%	4%	8%
Other Europe	4%	10%	27%	9%	12%
Asia	15%	14%		4%	8%
Other		10%		9%	4%
Melbourne					
UK	22%	19%	15%	27%	21%
Ireland		5%	4%		2%
Germany	11%		12%	9%	8%
Other Europe	11%	10%	4%		6%
Asia		5%	4%	4%	3%
Other	7%	14%		4%	6%
Sample	27	21	26	22	96
	100%	100%	100%	100%	100%

A range of age groupings and origin countries were represented. The distribution of states and territories that respondents either had visited or intended to visit is presented below in Table 2.

Table 2 States and Territories Visited or Intend to Visit by Interview Location

State/Territory	Interviewed in Adelaide		Interviewed in Melbourne	
	Visited	Will visit	Visited	Will visit
New South Wales	84%	14%	67%	33%
Queensland	59%	37%	29%	62%
Victoria	63%	31%	100%	
South Australia	100%		27%	51%
Western Australia	22%	43%	27%	36%
Tasmania	12%	28%	4%	38%
Northern Territory	31%	37%	16%	44%
Australian Capitol Territory	28%	18%	11%	9%
Sample	51	51	45	45
	100%	100%	100%	100%

Nearly all of the respondents interviewed in Adelaide had visited, or intended to visit, Victoria and New South Wales. In most cases they visited Victoria and New South Wales before they arrived in South Australia and were continuing their journeys to the Northern Territory and/or Western Australia. Around one third of the Adelaide respondents (31%) had visited the Northern Territory before arriving in South Australia while a further 37% intended traveling on to the Northern Territory. Around two-thirds (65%) of the Adelaide respondents had visited or intended to visit Western Australia.

There were some travellers who had entered Australia in Darwin or Perth and were traveling toward the eastern seaboard. For these individuals it was cheaper to enter Australia through these ports when compared to Sydney and/or the eastern seaboard.

Of those respondents interviewed in Melbourne around one-quarter (27%) had visited South Australia while a further half (51%) intended to visit South Australia.

The backpacker research conducted by Charles Darwin University[15] found that backpackers may not visit all of the places on their initial itinerary as they run out of time or money. It is likely that the proportion of respondents who end up visiting their intended states and territories will be less than the proportions reported in Table 2.

The distribution of length of stay in Australia is presented below in Table 3.

Table 3 Distribution of Length of Stay in Australia by Interview Location

State/Territory	Interviewed in:	
	Adelaide	Melbourne
Less than 3 months	16%	13%
3–6 months	27%	27%
7–12 months	51%	51%
More than 1 year	6%	9%
Sample	51	45
	100%	100%

The distribution of length of stay in Australia was similar for the backpackers interviewed in Adelaide and Melbourne. In general, the backpackers interviewed in Adelaide, and also Melbourne, were long stayers visiting a number of places within Australia. The average length of stay in Australia for all backpackers was 67 nights in 2005 to 2006 compared with an average length of stay of 114 nights for those who visited South Australia[16]. While excluding backpackers staying for more than 12 months, the IVS[17] data shows that in 2006 75% of in-scope backpackers were staying in Australia for three months or less, 13% stayed between three and six months and 12% between six and 12 months. Almost half (48%) of the backpacker visitors to Australia in 2006 stayed in Australia for one month or less.

In contrast to the benchmark data for Australia as a whole only 15% of the backpackers interviewed for this study were intending to stay in Australia for less than 3 months while 7% were planning to stay for more than 12 months. For the majority (51%) their intended stay in Australia ranged between seven and 12 months.

The respondents were most likely to have arrived in Australia between September and December 2006. The duration of their stay in South Australia was generally less than one week. The results of the IVS show that backpackers stayed in South Australia for 17 nights on average. This finding reflects the fact that a small number of longer staying visitors will influence the average length of stay of all visitors.

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[15] Charles Darwin University, 2006.

[16] South Australian Tourism Commission, 2006. Backpacker Fact Sheet. The IVS data from which the estimates are derived excludes persons staying for more than 12 months. The data presented in Table 3 suggests that the IVS may under-estimate the size of the market by 5% to 10% when those staying more than 12 months are considered.

[17] Tourism Research Australia, 2006.

Chapter 4

DECISION PROCESSES

Motivation to Visit Australia

Many of the respondents expressed a longstanding desire to see and experience Australia with the country often described as a 'dream' destination. The travellers' parents or relatives may have visited at some point in the past and may encourage their children to visit. There is also strong word of mouth about the Australian travel experience within peer groups. *'All my friends have done it'*. One Irish respondent described the trip to Australia as a '*rite of passage'* and spoke of stories of '*legendary parties*' that had been enjoyed by his friends.

Consistent with the results of the research conducted by Charles Darwin University Australia is strongly projected within origin markets through TV travel shows, films, TV soap operas, documentaries, magazines, WOM and other sources[18]. A young female from Korea referred to a chain of Australian restaurants with an outback theme. The exploits of the late Steve Irwin have also helped to raise awareness of Australia's natural assets over recent years.

Australia is perceived as completely different to the home environment for most visitors and the warm weather and beach lifestyle, the vast empty spaces of the outback, pristine natural environment supported by a friendly, safe and English speaking society represent an attractive mix of elements. For one individual their visit to Australia was a chance to challenge themselves and grow as an individual.

For many backpackers the outback is the core of the Australian experience and appears to be associated with a sense of escape from the constraints of everyday life. The outback represents freedom and the 'romance of the road'. The activity of traveling through the outback environment, particularly in their own vehicle, provides the sense of adventure as opposed to specific activities such as exploring for gems, star gazing, cycling, climbing etc.

While some of the respondents had taken leave from work to visit Australia most of those interviewed were on extended breaks. They were either taking a gap year between study and work or more study and in some instances they were studying in Australia. Other individuals had resigned from their jobs to travel.

The fact that Australia is an English speaking country was mentioned by a number of respondents—it provides a degree of cultural similarity and security for visitors from English speaking countries while also providing an opportunity for those from a non-English speaking background to develop their English language skills. Despite some negative publicity over recent years, Australia is regarded as a safe destination while providing opportunities for adventure and excitement.

Specific attractions were the icons—the Great Barrier Reef, Uluru, Sydney Harbor, plus Australian wildlife, beaches, surfing and sunny weather. The warm weather and relaxed Australian lifestyle were the elements that were most likely to be anticipated by visitors. This is particularly the case during the Australian summer where backpackers are escaping from the northern winter. The opportunity to socialize with other backpackers was important for some (although was not a major incentive) while challenging and adventurous activities were anticipated by a small proportion—mainly younger males.

Other factors mentioned by respondents included:
- German heritage (for a German visitor0
- nature/natural attractions/wilderness
- diving on Great Barrier Reef
- driving from Darwin to Broome.

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[18] Heath, R. (2000). Low-involvement processing. Part 2: Seven new rules for evaluating brands and their communication. Admap on WARC.com. Heath argues that in most instances marketing decisions are intuitive, rather than rational, and brand communication is processed at low levels of attention. The broad cultural environment within which a destination is projected is likely to be a critical element in determining consideration and choice.

Influence of Work

Most of the respondents (70% in Adelaide and 78% in Melbourne) had worked or were intending to work during their stay in Australia. The type of work they were most commonly undertaking related to[19]:

- fruit/vegetable picking/ farm work (26%)
- hospitality—waitressing and bar (23%)
- hostel /tourism—cleaning, admin, guiding (9%)
- retail (4%).

A number had secured work at backpacker hostels.

Access to a work visa and the availability of casual work is an important reason for choosing to visit Australia for many backpackers. Respondents contrasted Australia to both the USA and Canada in regard to the difficulty of obtaining a work visa. Around half (47%) had chosen to seek agricultural work in regional areas to extend their work visas.

Websites that provide information about work e.g. travelandwork.com[20]; study-travel-work-australia.com; gapyear.com; realgap.co.uk may be accessed to assist in travel planning. Some individuals had secured work prior to leaving home, such as:

- a Swedish male working for IKEA
- a chef from England arranging a job in Sydney six months prior to arrival.

Influence of Study

A total of seven respondents in Adelaide and seven respondents in Melbourne (15% overall) had enrolled in some type of course in Australia. A number of these were short duration English courses and an important reason for visiting Australia for some individuals is to improve their English language skills.

A small number of respondents from Asia had come to Australia to enroll in University courses. They were influenced primarily by education agents in their home country who recommended where to study and arranged for course enrolment and home stay accommodation. The education agents did not provide alternatives for different parts of Australia but rather recommended a single destination. Education agents may also recommend things to see and do in some instances.

These individuals were traveling as independent travellers toward the end of their stay and wanted to see the sights of Australia including the major cities before returning home.

Itinerary Planning

Adelaide respondents

As previously noted the respondents interviewed in Adelaide were mostly staying for at least three months in Australia and adopted a flexible attitude toward their itinerary. While those visiting for shorter periods were more likely to have a predetermined itinerary, for most of those surveyed flexibility was an integral ingredient of their Australian travel experience.

While some individuals had purchased or rented a vehicle for part of their trip for some others the idea of travelling in their own vehicle was highly attractive. The independence and flexibility of this arrangement was consistent with their objectives of independence, control and adventure.

They tended not to pre-book their trip beyond the flights into and out of the country, the first few nights accommodation and possibly a flexible train or bus pass. Internal flights at the beginning of their itinerary may have been pre-booked in some instances.

The longer-staying visitors generally intended to visit a wide range of places in Australia and had a broad itinerary in mind. As found by the Charles Darwin University research, backpackers may have more places they wish to visit than available time, particularly if they stay longer than expected at some places. This will adversely affect destinations at the end of the itinerary.

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[19] Includes individuals with two or more jobs.

[20] While mentioned by one respondent this web site had very few jobs listed anywhere in Australia. It may be an opportunity to ensure that work and travel web sites are populated with as many South Australian jobs as possible.

Some examples of itinerary planning are summarised below:

Wanted to visit main cities in Australia and also Kangaroo Island. Planned itinerary before arrival including 6 weeks self drive. Booked flights to Australia and first 6 nights accommodation. Then booked further accommodation in Sydney using YHA web site. Planned around activities and places: sand-boarding on Kangaroo Island, Uluru, Opera House and Bridge Climb. Used search engine online and WOM from friends. Flew to Melbourne from Sydney, hired a campervan and spent seven nights on the Great Ocean Road to Adelaide, hired a car for four nights on Kangaroo Island and then flew from Adelaide to Perth.

English male, 18–24 years staying four months in Australia

Decided to visit NSW, ACT, VIC, TAS and SA prior to arrival. Booked accommodation, transport and tours in each place as traveled. Respondent had relatives in Tasmania and rented a car there. Information sources included Lonely Planet guide book, Internet, brochures, WOM from friends. Arrived in Adelaide by bus: seven days in SA. Decided to visit SA prior to arrival in Australia. Attracted by Barossa Valley and the city. Linked with the GOR.

Slovenian couple, aged 18–24 years staying three months in Australia

Big English speaking country—recommended by peers— don't want to be left out. Didn't book any elements of trip prior to arrival. Booked Wayward Bus in Australia to travel Melbourne–Adelaide and on to Red Centre. Interested in indigenous culture, bush tucker, Great Ocean Road, Barrier Reef, Whitsundays, Sydney for New Year. Used websites, Lonely Planet guide, Thomas Cook for flights.

Irish female, 25–34 years staying 75 days in Australia

Saw web site for Nullabor Traveller—group camping trip—sunshine, space. Booked accommodation and camping trip directly online. Camping trip was main focus of trip plus wanted to see the main cities.

Dutch male, 25–34 years staying 21 days in Australia

Changed itinerary as travelled—e.g. stayed longer in Arlie Beach as nightlife was great. Flexibility very important. Drove rented van from Sydney to Adelaide to do GOR. Decide to visit SA in new year after finishing east coast. Allocated 10 days to SA. Sourced information from T&T magazine—top ten things to do. Booked day trip through tour operator.

Irish male, 25–34 years staying 12 months in Australia

Gap year from university—wanted to learn English, get scuba diving license and job in wedding company on Gold Coast. Decided to visit Gold Coast, Sydney and Adelaide prior to arrival in Australia. Booked homestay and school prior to arrival. Once in Australia referred to Japanese guide book and WOM from friends who had traveled before. Purchased train pass to travel on Overland, Ghan, Indian Pacific so this influenced itinerary. Used train to travel to Melbourne, Adelaide, Perth, Uluru.

Japanese female, 18–24 years staying 12 months in Australia

Came to Australia to improve English, work and have a good time. Focused on East Coast and Uluru—otherwise open. Used Lonely Planet guide to Australia. Friend at home had given advice. Flew to Tasmania with friends, bus tour along GOR. Met friend in Sydney who was from SA and influenced trip to SA. Flying back to Sydney.

German female, 18–24 years staying six months in Australia

Gap between education and work. English speaking country. So different to the UK. Once in a lifetime thing. Peer pressure—all friends have done it /doing it. Flew into Perth. Decided states and territories to visit prior to arrival. Booked flights to Australia only. Visit friends in Melbourne for Christmas and Sydney for New Year. Information from web—just Googling—and backpacker hostels. Influenced also by friends plans. Decided to look for work fruit picking in SA. Travel itinerary is flexible. Wanted to experience GOR and visit Coober Pedy.

English female, 18–24 years staying 18 weeks in Australia

Finished study—dream to visit Australia. Outback, emptiness, scenery. Availability of work.
Saw ads featuring the outback on German TV. Books, novels. Web—www.reisebine.de
Had flexible bus ticket - also purchased car in Rockhampton. Booked internal flights online in Australia. Decided to visit SA while in Melbourne. Traveling in own car. Linked to travel to the outback. Allocated seven days to SA. Referred to Lonely Planet guide. Booked Dolphin Swim and hostel.

German female, 18–24 years staying 11 months in Australia

From east coast south to SA via Melbourne and GOR then to Red Centre from Adelaide. Booked bus tour with Oz Experience and also booked accommodation in Cairns, Brisbane, Sydney through Qantas. Information through Lonely Planet guide and web. Booked hostels through YHA website. After arrival decided to visit Blue Mountains—heard about abseiling. Link up to GOR and Ghan to Red Centre. Adelaide is a main city so wanted to see Adelaide also. Traveled by bus on GOR—Firefly.

Dutch female, 18–24 years staying four months in Australia

Gap year from school—wanted to come for more than 10 years. First big trip, improve English. Wanted to see as much of Australia as possible. Referred to internet and Lonely Planet guide book. Availability of work influenced itinerary. Booked hostels through Internet hostelbookers.com. Train pass, bus pass, booked flights on net. Booked trip to Uluru with Outback Adventure through hostel. Was going to stay one night but staying two weeks in SA to go to pop concerts—like the hostel, making good friends. Referred to Lonely Planet guide book. Visited KI and Hahndorf.

German male, 18–24 years, staying 11 months in Australia

Taken long service leave—general interest—Lara Bingle ad. Information available in hostels, WOM, traveling with friends who influenced decision making. Booked flight and four nights accommodation in Sydney prior to arrival. Trail Finders—travel agent. Used web, Lonely Planet guide for information. Wanted to see Great Barrier Reef, general sightseeing. Traveled mainly by car/campervan (hire). Sydney, Brisbane, Sydney, Alice, Cairns, Brisbane, Whitsunday, Sydney, Canberra, Melbourne, GOR, Adelaide. Flight to Perth.

English male, 25–34 years, staying 10 months in Australia

Booked flight and one week of accommodation in Sydney. Booked thru Real Gap—agent in UK. www.realgap.co.uk. Agent didn't determine choices. Used Internet—workandtravel.com' and WOM. Bus from Sydney to Melbourne, train from Melbourne to Ballarat and bus to Mt Gambier—worked fruit picking in Mt Gambier. Linked to GOR—wanted to see 12 Apostles. Visited Kangaroo Island. Referred to enquiries@ozexperience.com. Allocated four months to SA. Traveled by bus and ferry to KI.

English male, 25–34 years, staying 12 months in Australia

Backpackers will book local tours and day trips through hostels and travel agents as they travel around and they expect that they will have sufficient flexibility within their itinerary to manage this. Internal flights will be booked online within one week of travel. If work or study had been arranged prior to arrival they may also have arranged home-stay accommodation. The majority (80%) had booked their return or onward flight from Australia prior to arrival.

The majority (82%) were also visiting other countries as part of their trip. The countries most likely to be mentioned included:

- New Zealand (39%)
- SE Asia (29%)—Malaysia, Singapore, Indonesia, Cambodia
- Thailand (27%)
- Hong Kong (22%)

One third of the respondents (35%) had considered other countries as an alternative to Australia. These included:

- New Zealand (these individuals generally visited New Zealand and Australia but may not have initially considered Australia)
- USA (too difficult to get a work permit)
- Europe/ China/ India

Information sources accessed by respondents included:

- guide books
- websites
- T&T magazine
- word of mouth from other travellers
- brochures—typically accessed through hostel and in some instances through travel agent or visitor information centre.

Prior to arrival in Australia respondents were most likely to access information through more general information sources such as government web sites (Australia.com), interactive blog sites (Backpackers.com), work and travel web sites (Realgap.com), agent sites (Statravel.co.uk) and guide books. Guide books, product orientated web sites (e.g. YHA), brochures etc were more likely to be used to access product following arrival in Australia.

Guide books include:

- Lonely Planet
- Rough Guide
- Let's Go
- YHA guide book
- World Tour Guide
- TNT Magazine
- Lanoos
- How to walk on the earth—Japanese
- UEB—Japanese
- Just Go— Korea
- Globetrotter—Japanese

Web sites include:

- Australia.com
- Immi.gov.au
- YHA website
- Hostelbookers.com
- Backpackvictoria.com
- Travelworld.on.net
- Backpackers.com
- Reisebine.de (German site with extensive interactive content)
- Backpackerplanet.dk
- Travelandwork.com (referred to this in home country)
- Gapyear.com
- Realgap.co.uk
- Naver (Korean)

Travel agents and other information sources included:
- STA Travel
- YHA
- Last Resort (Japanese agency)
- HQ
- Etopia

The online environment was generally used to search and book travel product—in particular accommodation and flights. Prior to arrival the web may be used to search for information about work opportunities and to read stories posted by other travellers. Respondents were most likely to report using a search engine, in particular Google, when seeking information online.

Melbourne respondents

For the respondents interviewed in Melbourne the focus of their planning prior to arrival was most likely to be traveling around Australia as a whole (29%) or focusing on the east coast—New South Wales, Queensland and Victoria (27%). Others stated that their itinerary was simply left open before they got to Australia although these individuals were a minority (13%). Others linked the outback with the east coast although they may not have specifically identified South Australia in this context.

Around three-quarters (78%) had booked their return or onward flight from Australia prior to arrival. The majority (84%) were visiting other countries in addition to Australia during their trip.

Very few of the individuals interviewed in Melbourne specifically mentioned South Australia as a component of their itinerary planning prior to arrival, confirming the findings of the Adelaide interviews that for many travellers Adelaide and South Australia are either part of a total see everything experience or they are on the way to somewhere else.

A number of the respondents mentioned Perth and the west coast as a place they wanted to visit. It was perceived as being less commercialised than the east coast, something different and a place they had '*heard good things about*'. Whether this is a case of travellers reacting against the perceived development of the east coast is not known but it would appear that the west coast is gaining in 'brand appeal' for the backpacker market. The west coast is the direct alternative semantically and possibly in branding terms to the east coast and can benefit from this.

Information sources accessed prior to visit by persons interviewed in Melbourne included:
- word of mouth from family and friends (76%)
- guidebook (62%)
- web sites (56%)

At this stage (prior to arrival) they will access more general rather than product specific portals e.g.
- Australia.com
- Immi.gov.au
- Backpackvictoria.com
- Travelworld.on.net
- Backpackers.com
- STA travel
- Reisebine.de (German site with extensive interactive content)
- Backpackerplanet.dk
- Travelandwork.com
- Gapyear.com
- Naver.com (Korean)
- ghan.com.au

Other information sources during the planning phase included:
- Unpackaged Travel Co
- Travel agent—Trail Finders
- Accommodation Guide YHA 2007
- Travel Bag
- STA Travel
- message boards with BBC

Around one third of these respondents had accessed interactive web sites or blogs of other travellers during the planning for their trip (prior to arrival). Interactive sites listed by respondents included:

- community web site: www.wobistdyjetzt.com
- GetJealous.com
- travellerspoint.com
- couchsurfing.com
- www.reisebine.de
- ww.naver.com
- mixi.jp
- statravel.com
- www.gapyear.com
- www.heere.net

While some sites are primarily travel blogs e.g. GetJealous.com other sites are primarily booking sites such as statravel.com that include electronic 'grabs' from travellers.

Aspects of the trip that were booked prior to arrival were as follows:
- flights into Australia (98%)
- flights within Australia (11%)
- accommodation (53%)
- tours (4%).

Where accommodation was pre-booked visitors were most likely to book between two and seven nights prior to their arrival in Australia. Around half (51%) of the Melbourne respondents had changed their itinerary following arrival while a further 11% indicated their itinerary had been open and flexible in any event.

Respondents may have changed their itinerary for a variety of reasons including the following:
- enjoying a place and decide to stay longer
- attending a special event, e.g. cricket
- availability of work
- running out of money (not doing as much as planned)
- word of mouth from friends/other travellers.

A number of respondents mentioned the Great Ocean Road as an experience that had influenced them to change their itinerary so this may be something they will find out about and consider while traveling in Australia.

Information sources influencing decision making whilst in Australia included the following:
- WOM from other travellers / family / friends (87%)
- guidebook (47%)
- brochures (9%)
- web sites (7%)
- travel agent (9%).

Around one-quarter (27%) stated that they accessed interactive web sites or blogs of other travellers as they travel around to get ideas about things to see and do. Again the blog sites included travel portals such as STA Travel. Agents mentioned included Peter Pan Travel, Wicked Travel, and Bays in Sydney.

Methods used to book accommodation and tours were as follows:
- direct with operator by phone (56%)
- direct with operator via web/email (33%)
- online travel portal (40%)
- travel agent (9%).

They tended to access information about accommodation and tours from a guide book and/or from a hostel. Only 4% of respondents did not book any component of their trip as they travelled.

Chapter 5

CHOOSING SOUTH AUSTRALIA

Image of Adelaide and South Australia

The survey respondents generally had little knowledge of Adelaide and South Australia prior to visiting. They were most likely to mention:
- Barossa Valley and wine
- Adelaide as a major Australian city
- laid back, small city
- a place to relax
- boring and not much to do
- Kangaroo Island
- gateway to the outback
- Coober Pedy
- The Ghan (must see for some)
- German culture / Hahndorf
- festival city
- Glenelg
- River Murray
- sharks.

While Adelaide was regarded as a bit small and lacking nightlife by some, for others the city is attractive as a place to relax for a few days. The local people are regarded as friendly and easygoing. South Australia is also associated with opportunities for agricultural work. One student who was studying in Western Australia stated that friends had told her that Adelaide was a good place to study.

While South Australia is a great place to spend a few days relaxing while transiting between the east and west coast and/or the outback there was little that was compelling or 'must see'.

Need more big events and famous landmark. Reputation is quiet/ boring. Swedish male, 18–24 yrs, staying 10 months

Clubs are quiet during the week. Needs more activities and action e.g. Gold Coast. Irish male, 25–34 years, staying one year (10 days in SA)

For the respondents interviewed in Melbourne around half (47%) said they knew nothing about Adelaide and South Australia. The most common associations were:
- wine and/or the Barossa Valley (24%)
- Kangaroo Island (16%)
- Coober Pedy / the outback (7%)
- Great Ocean Road (7%).

Some of these respondents also mentioned that Adelaide was a bit quiet, not much to do, boring.

Motivation to Visit South Australia

Most of the backpackers interviewed in Adelaide were staying in Australia for three months or more and wanted to see as much of Australia as possible during this period. Their visit to South Australia was generally linked to the Great Ocean Road (GOR), the outback or both. Many backpackers are in Adelaide as they are transiting between transport services e.g. train, air, bus etc. Most were traveling overland.

While visitors have some awareness of things to see and do in South Australia the desire to do these things for many is not strong. For example, a student from Perth en route from the Red Centre felt that the attractions and activities around Adelaide were not sufficiently different from what was available in Western Australia. Another was

interested in Kangaroo Island (KI) but decided it was too expensive to visit for one night (implying that time allocated to South Australia was very limited). There was a reasonably high level of awareness of KI and some respondents had visited or expressed a desire to visit this destination. One individual had seen an image of sand surfing on Kangaroo Island at home in England and had planned to visit KI specifically for this.

The outback is also a critical focus and Adelaide and South Australia represent the gateway to the outback. A shorter stay traveller had come across Nullabor Traveller at home on the web and booked a trip with them direct. The German heritage in South Australia was also a factor for one visitor from Germany.

Melbourne respondents who were visiting Adelaide and South Australia were most likely to indicate that the reason for their trip was:

- linked to a tour of the Great Ocean Road (43% of those visiting South Australia)
- wanting to see Adelaide / South Australia (26% of those visiting South Australia)
- linked to a visit to the outback (11% of those visiting South Australia)
- wanting to see all of Australia (9% of those visiting South Australia)
- Barossa and wine regions (9% of those visiting South Australia)
- Kangaroo Island (9% of those visiting South Australia).

Only one individual was coming to look for work in South Australia. Another individual wanted to visit Naracoorte Caves.

Melbourne respondents who had not visited or were not intending to visit South Australia were asked why they had not considered visiting Adelaide or South Australia. The most common responses were:

- lack of awareness
- lack of time.

Itinerary Planning for South Australia

The Adelaide respondents in the main had decided to visit South Australia prior to their arrival in Australia. There was however a significant proportion (25%) who had decided to visit at some point during their stay in Australia. The greatest influence for those who added South Australia to their itinerary appeared to be word of mouth from friends and other travellers.

As previously noted South Australia is strongly linked to the Great Ocean Road and the outback and a decision to add these experiences to their itinerary will determine whether travellers visit South Australia.

Day tours from Adelaide were booked through accommodation, an agent or directly with the tour operator generally following arrival. The respondents accessed information about attractions and tours from guide-books, WOM from other travellers, brochures and the web. They were likely to access brochures from hostels and visitor information centers to some extent (brochures / pamphlets are a minor information source).

Information sources for South Australia included:
- Lonely Planet Guide
- Adelaide Visitor Guide
- Nomad brochure
- Brochures / pamphlets through hotels / hostels
- Visitor Information Centre

Day tour activity from Adelaide included:
- Barossa and wine regions—Groovy Grape
- Hahndorf
- Dolphin swim—Temptation sailing

A few individuals who were looking for work stated they would stay in South Australia if work was available. At least two respondents had come to South Australia to look for work.

Transport To and Within South Australia

For the Adelaide respondents the most common mode of travel to South Australia was bus (48%), followed by a private or rented vehicle (25%), train (17%) and flight (10%)[21]. They were most likely to be travelling from the east coast and most (59%) had travelled on the Great Ocean Road. A number of respondents had hired a car or campervan in Melbourne to travel the Great Ocean Road.

Respondents arriving from or proceeding to Western Australia were more likely to travel by train. They may also switch transport modes in Adelaide to train or air after traveling by bus or rented vehicle to get to Adelaide. For the Melbourne respondents 23% of those visiting South Australia were traveling by plane, 43% were arriving by bus, 11% by train and the remainder by private/rented vehicle.

Travel within South Australia was most likely to be by bus (34%) or private / rented vehicle (60%).

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[21] The data from the IVS shows that more than 25% of backpackers fly into SA—when examined on the basis of accommodation this figure falls to around 20% for those in hostel accommodation—compared to around 40% for those in self contained accommodation or staying with friends/relatives.

Chapter 6

THE OUTBACK

The respondents were asked a number of questions regarding their image of the Australian outback and what they might expect from that part of Australia.

Their comments suggested that the outback has a special meaning for travellers from places where space is at a premium. To experience the vastness of Australia's interior provides a sense of release, adventure and challenge. While places such as Kakadu, Uluru and Alice Springs may provide structure to their journey it is the experience of traveling through this environment, particularly if they do this independently, that represents the essence of the Australian outback experience for many.

In response to a picture sort (see Chapter 7) the most popular images were a lone vehicle at sun set on an outback road and a group of backpackers standing in front of an Australian road sign. The images are reproduced on the front cover of the report.

Geographically the outback was most commonly associated with the Red Centre—that is Uluru, the Olgas, Alice Springs and Kings Canyon. While Coober Pedy was mentioned by some respondents other areas of South Australia—in particular the Flinders Ranges—were not associated with the Australian outback. There were very few references to the Flinders Ranges.

While safety in the outback was generally not an issue, a small number of visitors, including two young women from Japan, regarded the outback as a dangerous place to visit, due to the harsh environment rather than any concerns about crime.

Other associations with the outback elicited by respondents related to:
- Aboriginal culture
- colors / red earth
- heat
- emptiness
- lack of people
- unspoilt
- difference from home
- isolation
- danger
- stars
- native animals at sunrise
- camping
- walking.

Product gaps and issues related to:
- taking a tour to Uluru but not being allowed to climb
- lack of hostel accommodation
- phone coverage.

Chapter 7

IMAGE SORT

The respondents were prompted with a set of 17 images and asked to select the six that were most attractive. The frequency of responses was:

	Adelaide		Melbourne	
	First pref.	Total pref.	First pref.	Total pref.
Vehicle on empty dusty road in outback at sunset	7	38	9	30
Friends in front of road sign—car touring	6	33	4	18
Surfing	4	25	7	27
Walking into water with sea lions	5	24	5	21
Couple—sleeping in outback	4	22	1	18
Couple—contemplating vast spaces / hiking	3	19	3	16
Bikes on beach	1	19	2	20
Vineyard	3	18		16
Bicycling in wilderness	4	18		14
Shark diving	6	18	6	17
Aboriginal culture—sharing in a dance	2	16		5
Diving with sea lions	2	16	2	21
Rock climbing	2	16	4	25
Couple camping and kangaroo	2	10	2	13
Wine—Jacobs Creek	0	5		2
Noodling for opal	0	4		1
Star gazing in a star chair	0	4		6

While activities are important for itinerary planning it was interesting that the most preferred images for the South Australian visitors were touring the outback by car including sharing the experience with friends. This may point to the 'romance' of the Australian outback as an aspirational travel goal and also the importance of camaraderie and a shared sense of adventure.

Activity focused images were also popular, in particular surfing, rock climbing, swimming with seals, shark diving and bicycling. The Melbourne respondents tended to be more activity focused—for example, rock climbing was attractive to 25 of these respondents compared to 16 of the Adelaide respondents. The Adelaide respondents were also more likely to respond to touring the outback by car with friends and Aboriginal culture, suggesting they may be more experiential than the Melbourne sample.

While Aboriginal culture is generally regarded as an important component of the outback product there was not a strong response to the relevant image which depicted young travellers sharing a dance with Anangu people at Mimili. It may be the case however that the results show that the image used did not resonate with the respondents rather than a lack of interest in Aboriginal culture.

Some activities may have strong niche appeal. Shark diving, whilst recording 35 preference votes overall, recorded 12% of the first preference votes, mostly from young males, and is clearly an activity that would motivate some individuals to visit South Australia (subject to considerations regarding price).

Comments relating to the images are as follows:

Noodling	Funky and cool / Wouldn't do at home
Wine	Work / Learn about wine / Wine at home, Germany / famous Australian wine
Aboriginal culture	This is Australia—not beach and bikini models / unique experience
Car touring	To be with friends / road trip / fond memories of past road trips / even breaking down was fun / having best time of life
Bikes in outback	Unusual / on your own with nature / off the beaten track
Wine—Jacobs Creek	Know wines from home—UK / hot air ballooning
Seals	Colors—warm / KI
Surfing	Looks so easy / Australian lifestyle—laidback, beaches, sea
Rock climbing	Did this in Grampians
Outback	Freedom / adventure / setting off into the unknown / nice to see no people / unique in the world / remote / at one with the landscape / dream is a road trip through outback / pure Aussie
Native animals	Romantic / nature / harmony
Star gazing	Funny and crazy / Never do this at home
Seals	Get close to wild animals / KI
Sleeping in outback	Romantic / freedom / own pace / sleep anywhere / comfortable
Couple—contemplating vast spaces / hiking	Didn't think Australia was green
Bikes on beach	Refreshing / freedom / Fraser Island
Shark diving	A real experience / scary as hell / expensive—$2000 for three-day trip

APPENDIX A: QUESTIONNAIRE

A STUDY OF BACKPACKER TRAVELLERS IN AUSTRALIA

1.   What is your nationality (by passport).

_____

2.   Which of the following best describes your age?

	Female	Male
18 – 24 years	1	2
25 – 34 years	3	4

3.   Which States and Territories in Australia have you visited or do you intend to visit on this trip?

	Visited	Intending to visit
New South Wales	1	2
Queensland	1	2
Victoria	1	2
South Australia	1	2
Western Australia	1	2
Tasmania	1	2
Northern Territory	1	2
Australian Capital Territory	1	2

CHECK QUOTAS

4.   Who are you traveling with on this trip to Australia?

_____

5.   On what date did you arrive in Australia?

_____

6.   How long are you intending to stay in Australia on this trip – including days already spent in Australia?

Number of days _____

7.   Did you book your return or onward flight from Australia prior to your arrival?

Yes 1   1
No 2   2

8.   Have you worked or do you intend to work during you stay in Australia?

Yes 1   1
No 2   2

If yes – please give details of type of work and the place/s where have worked (or would like to work) e.g. bar work on Gold Coast, grape picking in the Barossa etc

_____

_____

9. **Did you – or will you - work in regional areas to extend your stay in Australia under the terms of the working holiday visa.**

Yes 1
No 2

If yes – what type of regional work is attractive.

_____

10. **Have you enrolled in any courses at an educational institution (including short courses) or do you intend to do so during you stay in Australia?**

Yes 1
No 2

If yes – please give details of course/s and the educational institution including the location.

_____

_____

11. **What other countries have you visited or do you intend to visit on this trip?**

_____

_____

12. **What was your main reason for visiting Australia?**

Pleasure / holiday.. 1
Visiting friends / relatives....................................... 2
Study 3
Work 4
Once in a lifetime trip / dream trip 5
Other 6

_____

13. **What were you most looking forward to about visiting Australia? PROBE**

Weather / relaxed lifestyle 1
Beach / beach activities.. 2
Party / socialize / have fun 3
Adventurous activities 4
Nature / native animals... 5
Completely different from home 6
Space / lack of people 7
Other - specify 8

_____

_____

PROBE – IS FOCUS ON ACTIVITIES OR SIGHTSEEING

14. When planning your trip to Australia which parts of the country did you plan to visit? RECORD THEIR OWN WORDS

_____

_____

_____

15. And why did you want to visit those places?

_____

_____

_____

_____

16. Where did you get information about things to see and do in Australia when planning your trip - before you arrived? PROBE

WOM from friends/family 1
Guidebook - specify 2

_____

Web sites - specify 3

_____
Brochures - specify 4

_____
Other - specify 5

_____

_____

17. Do you access interactive web sites or Blogs of other travellers to get ideas about things to see and do?

Yes 1
No 2

If Yes – specify web sites accessed.

_____

_____

18. What aspects of your trip did you book before you arrived in Australia? PROBE

Nothing 1
Flights into Australia 2
Fights within Australia 3
Train pass for multiple journeys 4
Specific train journeys 5
Other transport 6
Accommodation 7

No. of nights pre - booked_____
Tours 8
Other - specify 9

_____

19. After arriving in Australia did you change your itinerary or decide to visit other places for one or more night.

Yes 1
No 2

If Yes – what other places have you decided to visit since arriving in Australia.

_____

_____

_____

20. As you travel in Australia i.e. since you arrived -how do you make decisions about what to see and do? PROBE

WOM from friends/family/other travellers 1
Brochures – specify source 2

_____
Guidebook - specify... 3

_____
Web sites - specify 4

_____

_____
Travel agent – specify 5

_____
Other - specify 6

_____

_____

21. Do you access interactive web sites or Blogs of other travellers as you travel to get ideas about things to see and do?

Yes 1
No 2

If Yes – specify web sites accessed.

_____

_____

22. How do you book accommodation or tours? PROBE

Direct with operator via phone................................. 1
Direct with operator via web / email 2
Through on-line travel portal - specify 3

_____

Travel agent - specify 4

_____

Don't book anything.. 5

23. What do you know about Adelaide and South Australia? PROBE – RECORD MULTIPLES

Nothing 1
City of churches.. 2
Wine / Barossa 3
Kangaroo Island 4
Coober Pedy / Outback 5
Flinders Ranges 6
Other - specify 7

_____

_____

_____

_____

IF HAVE NOT VISITED OR NOT INTENDING TO VISIT SA GO TO Q27 (SEE Q3)

24. Why did you decide to visit South Australia? PROBE – RECORD MULTIPLES

Linked to tour of GOR 1
Linked to the Outback 2
Want to visit all parts of Australia 3
Just to see Adelaide / SA 4
Barossa / wine regions 5
Kangaroo Island 6
Flinders Ranges 7
Opportunity to work 8
Opportunity to study 9
Friends/relatives recommended 10
Other - specify 11

_____

_____

_____

_____

25. How did you travel / will you travel into and out of SA?

Arrival

    Plane 1
    Bus 2
    Train 3
    Other 4

Departure – If different

    Plane 1
    Bus 2
    Train 3
    Other 4

26. How did you travel / will you travel within SA?

    Plane 1
    Bus 2
    Train 3
    Other 4

FOR THOSE NOT VISITING SA (SEE Q3)

27. Are there any particular reasons why you did not consider visiting South Australia. PROBE – RECORD MULTIPLES

    Don't know anything about it 1
    Lack of time 2
    Nothing I wanted to do 3
    Nothing 'world famous' 4
    Too quiet / boring 5
    Friends wanted to go elsewhere 6
    Other - specify 7

    _____

    _____

    _____

ASK ALL

28.1 What comes to mind when you think of the Australian Outback? PROBE – RECORD MULTIPLES

    Uluru / Olgas 1
    Alice Springs 2
    Coober Pedy 3
    Flinders Ranges 4
    A place Id like to visit... 5
    Desert / empty / red sand 6
    Dangerous animals – snakes, spiders, lizards 7
    Scary – could get into trouble................................. 8
    Other - specify 9

    _____

    _____

28.2   What can you picture yourself doing in the Australian outback?

Climbing Uluru   1
Camping out   2
4WD touring   3
Searching for opals   4
Other - specify   5

_____

28.3   Are there any things you'd like to do in the Outback that are not available?
_____

_____

_____

_____

29.   SHOW IMAGES AND DETERMINE RESPONSE / LEVEL OF INTEREST. RECORD COMMENTS / ASSOCIATIONS

Rank

A. _____[   ]

_____

B. _____[   ]

_____

C. _____[   ]

_____

D. _____[   ]

_____

E. _____[   ]

_____

F. _____[   ]

_____

30. Would you associate these images with Adelaide and / or South Australia?

Yes all of them... 1
None of them.. 2
A 3
B 4
C 5
D 6
E 7
F 8

THANK RESPONDENTS & ASK WHETHER THEY HAVE ANY FURTHER COMMENTS OR QUESTIONS REGARDING THE RESEARCH

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