DRIVE TOURISM

UP THE WALL AND AROUND THE BEND

Editors: Dean Carson
Iain Waller
Noel Scott

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Up the Wall and Around the Bend

Centre for Regional Tourism Research

The Centre for Regional Tourism Research is a partnership between the Cooperative Research Centre for Sustainable Tourism and Southern Cross University. It was formed in 1998 to undertake research and extension activities to help grow tourism industries, which would contribute to sustainable communities in regional Australia. The Centre has been substantially expanded throughout 2001/2002, and has forged links with the Australian Regional Tourism Network. The Centre has appointed a Management Board representing the Network, Southern Cross University, and CRC Tourism. The Management Board has developed a business plan based on the mission:

> To provide research output that can underpin sustainable regional tourism in Australia.

The Centre has the vision:

> To be seen as the credible, authoritative, respected resource centre for research and professional development in regional tourism.

This book is one in a series of publications reflecting the research focus of the Centre. For further information, consult the CRC for Sustainable Tourism web site (www.crctourism.com.au/bookshop).

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Executive Summary

This book provides some perspectives and case studies on self-drive tourism in regional Australia. The self-drive market is extremely important to tourism in Australia, and has characteristics which influence how tourism product is managed and distributed. In particular, the book is concerned with the nature of activities undertaken by self-drive tourists, and their trip planning behaviour. This book is intended for use by researchers, as it provides an overview of existing research and highlights gaps and potential new research approaches.

Tourism managers will be able to use this book as a source of case studies and to provide a better understanding of the variety of tourism markets, which use self-drive transport. The book will serve as a reference tool for tourism planners who wish to access drive tourists in their product development and marketing campaigns. Contributions to the book have come from both industry and academia. Contributors come from five States, and the topics discussed reflect the diversity of tourism in regional Australia generally, along with the diversity of drive tourist experiences.

This book reports on a variety of research, which can contribute to increased understanding of drive tourism, and consequently assist in improving marketing and management practices.

Chapter 1 (The Nature of Drive Tourism in Australia) describes the current state of knowledge about the self-drive market in regional destinations, and identifies gaps in that knowledge. Chapter 2 (Keeping Track of the Drive Market) examines drive tourism in Queensland as a case study. It is based on a series of extensive research projects conducted by Tourism Queensland. It highlights a number of drive tourism segments as well as the information needs and holiday preference for drive travellers. A number of research and policy implications are highlighted.

Chapter 3 (Drive Tourism and Special Interest Tourism) considers the kinds of activities and interests which are engaged in by drive tourists. Drive tourism is linked to the concept of special interest tourism, where tourists have specific purposes (usually activity based) for visiting destinations. This chapter describes how understanding special interest characteristics of drive tourists could improve marketing and management approaches.

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Chapter 1

The Nature of Drive Tourism in Australia

Dean Carson and Iain Waller

1.1 Introduction

There has been substantial recent discussion about the role of transport in tourism and tourism development (Burton 1994; Lamb & Davison 1996; Page 1999; Prideaux 2000). This discussion can be expected to increase in the Australian context in particular in the wake of the transport 'crises' linked to the September 11 terrorist attacks in the United States, and the collapse of national and regional air transport services culminating in the corporate failure of Ansett airlines in September 2001. One of the implications of these events has been to focus attention on alternatives to air transport, and particularly on the private and 'self-drive' vehicle (*Weekend Bulletin* 2001). This book presents research into the relationship between self-drive transport and tourism development. The quantitative significance of self-drive tourism is described, and a variety of features of self-drive markets are explored. The aim of the book is to identify the diversity of research issues associated with self-drive tourism, and to present some models, which can shed light on this diversity. The need for a book on this topic is evident from a review of the recent literature. Despite 80% of domestic tourists arriving at their destination by car, there is little discussion of drive tourism in the literature and almost none in the Australian context.

The book addresses this gap and contains a variety of contributions from Australian academic and industry-based researchers. Its genesis has been from the Centre for Regional Tourism Research, a partnership between the Cooperative Research Centre for Sustainable Tourism and Southern Cross University (Prosser 2000). That a research centre focused on regional issues should be involved is not surprising, as the research demonstrates that self-drive tourism is particularly important in regional Australia, and for domestic tourism. Many of the pieces of research reported in this book concentrate on these aspects of self-drive tourism, although the key issues also apply to metropolitan and urban visitor flows, and there are forms of self-drive tourism (such as fly-drive tourism) which particularly involve international visitors. The research conducted for this book is presented within the following framework:

- Self-drive tourism is complex and diverse in terms of markets, locations, and impacts, and taken together is overwhelmingly the most substantial component of the transport mix in Australian tourism,
- Understanding self-drive tourism is particularly important for regional tourism destinations,

- Self-drive tourists are most usually domestic tourists, but there are key international markets represented as well,
- Understanding the characteristics of self-drive tourists and the nature of visitor flows is central to the sustainable development of tourism in many destinations, and for the success of many tourism products.

1.2 Research on Transport and Tourism

As Prideaux (2000) noted, the tourism literature is dotted with references to the central role transport plays in tourism activity. Transport is seen as an enabler of tourism (Faulkner & Poole 1989); a necessary precursor to tourism activity (Leiper 1995); and as serving as part of the attractions mix in some scenarios (Hall 1998). There has been research into the economic and destination choice implications of long haul air transport (Chu Te 1993). Long distance bus and coach travel has been studied in terms of market characteristics and product development (King 1988). Similar research has examined rail transport (Hensher 1989). However, both Prideaux (2000) and Hall (1998) note that researchers have tended to treat the transport component of tourism lightly, and have failed to investigate in depth why particular transport options are chosen, how these may influence the development of tourism in specific destinations, and how transport options may reflect market characteristics and provide opportunities for improved tourism management.

The Federal Government in Australia has long recognised the need for adequate and efficient transportation systems to facilitate the sustainable growth of tourism throughout the country (Commonwealth Department of Tourism 1992; Commonwealth of Australia 1998). The desired benefits of a strong and dispersed tourism industry: employment; economic stimulus; improved resource management; and the protection of social and cultural resources – requires adequate access to tourism destinations, not only for tourists, but for the material goods they consume (Hall & Page 1999).

Significant public sector investment is made in planning, building, and maintaining transport infrastructure (Bull 1995). Local Government, regional tourism organisations, and State tourism bodies invest in signage and promotion of transport options to demonstrate accessibility of particular destinations, and to manage the flow of tourists between and within destinations. Some Government may have a particular interest in using transport networks to disperse tourists and their economic impacts (Charlton 1998).

Prideaux (2000) identified the four main modes of transport as: road; rail; air; and sea. For travel to and within destinations, the choice of which mode, or modes, of transport are used may depend on the travellers' evaluation of speed; carrying capacity; comfort; cost; and safety. Mode selection may also be a function of consumer characteristics and market behaviour, although surprisingly little research has been published on this issue. Table 1 identifies some of the generic characteristics, which may effect the selection of the various modes of transport. Each characteristic may assume different values, or different decision-making significance for different destinations, and at different times.

Table 1: Generic Characteristics of Transport Modes

Mode	**Characteristics**
Road: Private car Rental/hire car Taxi Bicycle Foot/ other self propelled Bus/ coach	Relatively slow Small carrying capacity Generally high comfort Flexible itinerary (exc. bus/coach) Variety of distances Relatively low cost Relatively poor safety
Rail	Relatively slow Large carrying capacity Variable comfort Rigid itinerary Variety of distances Relatively low cost High safety
Sea: Cruise Ferry Private craft	Slow Variable carrying capacity Relative comfort Variety of itinerary options Variety of distances Relatively high cost Relatively high safety
Air	Fast Large carrying capacity Limited comfort Rigid itinerary Longer distances High cost High safety

Modes of transport are used to travel to, within, and between destinations. Transport behaviour may even be used to distinguish between 'destinations' and 'points of transit' (Leiper 1995). The relative significance of the various modes of transport to Australian tourism is difficult to assess, as many trips involve multiple transport modes (Bureau of Tourism Research 1997). Analysis of transport data from the Bureau of Tourism Research indicates that the various modes of transport play different roles in supporting visitor flows in regions of Australia (Tideswell & Faulkner 1999).

1.3 Sources of Information

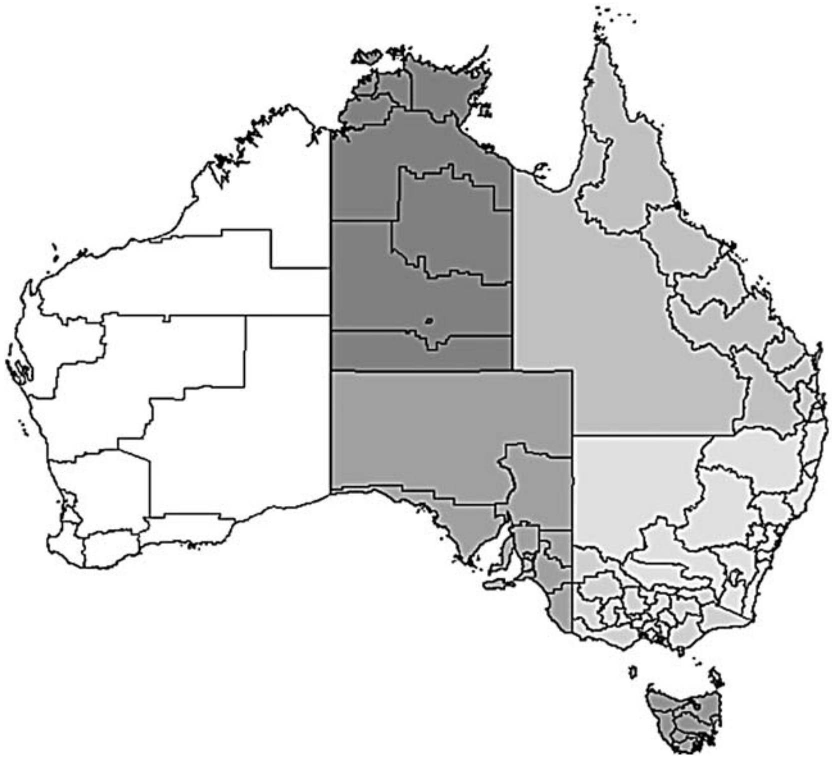
The Bureau of Tourism Research is responsible for delivering results from two data collections: the International Visitor Survey; and the National Visitor Survey. The International Visitor Survey (IVS) includes approximately 20000 interviews with international visitors in departure lounges in Australia's international airports. The IVS was conducted by the Australian Tourism Commission from 1979 (excluding 1982 and 1987) before the responsibility was assigned to the Bureau of Tourism Research in 1988. The sampling methodology includes quotas based on flight destinations, country of residence, and basic demographics. The survey asks about destinations visited, characteristics of visitors, and travel behaviour and expenditure (Hunt & Prosser 1998). It is intended to be analysed in terms of country of residence of visitors, and has been criticised for its poor quality for analysis in terms of destinations (Jones 1994/1996; Hutchison 1997).

The National Visitor Survey (NVS) commenced in January 1998 and replaced the Domestic Tourism Monitor, which had provided domestic tourism information since 1978. It involves household interviews with 80000 Australian residents annually. Information is gathered on visitor characteristics, destinations (domestic, international, and day trips), and activities and expenditure. Attempts are made to ensure that data can be analysed for most of Australia's 84 tourism regions (shown in Figure 1) (Hunt & Prosser 1998).

In choosing to analyse data from the IVS and NVS, it is recognised that these collections have national significance, are widely available, and have widespread recognition. The Bureau of Tourism Research has invested considerable resources in maximising the quality of data from these collections, particularly at a national level. However there are some limitations in using this data:

- There is a significant lag between data collection and release, with the most recent data available at the time of this research being from 1999 (an eighteen month lag currently – this has been less in the past).
- The IVS contains transport related data for 1999 only, making historical analysis impossible.
- The NVS began in 1998, and there are too many methodological inconsistencies to allow comparison with previous data from the Domestic Tourism Monitor.
- Data definitions and elements differ between the IVS and NVS, making it impossible to conduct combined analysis.
- The bulk of transport data relates to the unit of analysis of a 'stopover' (i.e. a location in the visit where the visitor spent at least one night), and it is difficult to retrieve transport data relating to an entire visit unless unit record data is available.
- Unit record data is prohibitively expensive, so analysis must be performed on pre-formatted 'data cubes', limiting the sophistication of analysis.

Figure 1: Australia's Tourism Regions



Despite these limitations, the Bureau of Tourism Research data provides an overview of visitor behaviour, and is appropriate for describing the 'big picture' characteristics of transport use. Later chapters call on a variety of additional national and local data sources to detail specific elements of that picture.

1.4 Overview of Self-drive Tourism Characteristics

In terms of international visitors to Australia, it is clear that air is the most common transport mode for entering Australia. While it is possible to travel to Australia by sea, only a very small proportion of inbound tourists who do so. The International Visitor Survey is conducted exclusively with visitors departing (and so most normally arriving in) Australia by air. However, once in Australia, international visitors use a variety of transport modes. Table 2 summarises the transport information contained in the 1999 International Visitor Survey. The first column identifies the percentage of visitors who used each form of transport to travel from the airport of arrival into Australia to their first stopover destination (i.e. the location they spent their first night in Australia). Self-drive modes of transport in Table 2 include: private or company car; rental car; self-drive van, motor home or campervan; and four-wheel drive vehicle. Other road transport includes long distance coach/bus travel, but also: taxi or chauffer driven hire car; local public transport; hotel or motel shuttle/courtesy bus; and charter or tour bus. The second column identifies the percentage of visitors who used particular modes of transport when travelling from one stopover to the next. Percentages here add to more than 100 as visitors who made multiple stopovers may have used different modes of transport between different stopovers. The third column identifies the percentage of visitors who used particular modes of transport from their final stopover location to the airport of departure from Australia. The final column shows the percentage of visitors who used particular modes of transport at any time during their visit to Australia. Again, percentages may add to more than 100 for this column.

Table 2: Transport Mode Selection for International Visitors to Australia 1999

Mode of Transport	% Used to First Stopover	% Used between Stopovers	% Used from Last Stopover	% Used at Any Time
Self-drive	30.2	38.9	32.1	47.9
Other road	48.6	28.1	57.5	68.0
Rail	0.5	6.8	0.4	4.0
Sea/ water	0.3	7.3	0.1	4.1
Air	20.0	62.3	9.7	47.0
Other transport	0.3	0.9	0.2	0.9

Table 2 shows that a high proportion of visitors used self-drive transport under each scenario. For transport to the first stopover, self-drive modes (30.2%) were the second most popular selection behind other road (48.6%) and ahead of air transport (20%). For transport between stopovers, self-drive modes (38.9%) were less popular than air transport (62.3%) but more popular than other road (28.1%). Transport mode selection from the last stopover favoured other road (57.5%) and self-drive (32.1%). Overall, self drive modes (47.9%) were as popular as air transport, while other road transport (68%) was the most popular overall. Table 2 clearly demonstrates the importance of self-drive transport modes for international tourism in Australia – and particularly for transport between stop-over destinations.

Table 3 shows the transport mode selections for visitors who visited at least one regional area in Australia as compared to those who visited no regional areas. Regional areas incorporate tourism regions outside the major capital cities and the southeast Queensland urban zone (Brisbane and Gold Coast) (Kelly 2002). Overall, 42.1% of international visitors spent time in at least one regional area during their visit. In terms of visitors, 53.6% of visitors to regional areas used self-drive transport compared with 32.3% of those who visited no regional areas. Table 3 focuses on the total number of transport selections (i.e. individual visitors may have more than one transport selection if they have more than one stopover destination). In total, the Bureau of Tourism Research estimated that there were nearly 4 million transport selections for travel to, from, and between stopovers by international visitors in 1999. About 1.9 million of these were made by visitors who visited at least one regional area. The table shows that 36.7% of these selections involved self-drive transport modes. For visitors who visited no regional areas 26.3% of transport selections were self-drive. Chi-square analysis indicates that visitors to regional areas are significantly more likely to choose self-drive transport modes than those who do not visit regional areas ($p > 0.001$).

Table 3: Percentage of Self-drive Transport Selections for International Visitors to Regions 1999

Selections	**% Regional**	**% Other**	**% Total**
Self-drive	53.64	32.30	38.88
Other road	30.93	23.46	28.11
Long distance train (non-suburban)	5.73	5.93	6.76
Ship/ boat/ ferry	10.59	1.70	7.27
Aircraft	44.20	58.95	62.33
Other transport	1.05	0.53	0.93
Total	**100.00**	**100.00**	**100.00**

The analysis of Tables 2 and 3 reinforce that self-drive transport modes are important for international tourism, but particularly so for international tourism in regional areas. While analysis of the National Visitor Survey shows that self-drive tourism is more significant for domestic tourism, there are implications for increased understanding of the inbound market through research into drive tourism.

The 1999 National Visitor Survey showed that 77% of all overnight trips by domestic tourists included self-drive as their main mode of transport. The next most popular transport mode selection was air travel at 15%. While it is impossible to directly compare these findings to the International Visitor Survey (the National Visitor Survey has overnight trips as the unit of analysis, compared with visitors as the unit of analysis for the International Visitor Survey), it appears that somewhere between 40 and 50% of International Visitors used self-drive transport as their main transport choice within Australia, compared to 77% of domestic tourists. These percentages along with relative number of international and domestic travellers indicate that for regional areas, domestic drive tourism is much more important than international drive tourism. Consequently, much of the research presented throughout this book focuses on domestic tourism.

The 1999 National Visitor Survey also showed that self-drive tourism was significantly more popular for tourists on multiple destination trips (83% used self-drive compared with 77% on one-stop trips. $P>.001$), and for tourists visiting regional areas (86% compared with 62% for those not visiting regional areas. $P>.001$). While longer trips and trips with more stopover locations, and trips to regional areas were particularly dependent on self-drive transport modes, the percentage of domestic tourists using self-drive tourism for any type of travel was substantial. Again, while this book has a regional focus, it is important to recognise the application of self-drive tourism research to all forms of domestic, and inbound, tourism.

1.5 Approaches to Understanding Drive Tourism

Table 1 considered some generic observations on the nature of different transportation modes. Self-drive tourism has advantages for tourists in terms of: greater control over speed of travel (although slower speed than air and some rail travel); greater control over itinerary; often greater comfort and lower cost. At the same time, however, self-drive tourism generally has lower carrying capacity (people) than other forms of transport, although it may involve higher freight capacity in practical terms than many other forms of transport. Self-drive tourism is also associated with relatively low safety, as reflected in Australia's road accident statistics, and the tendency for road accidents and road deaths to peak at key holiday periods (Woodley 2002).

From a tourism industry perspective, self-drive transport modes allow for greater dispersal of tourism flows, and may be used to bring tourists and associated economic outcomes to locations away from the major transport routes (especially air transport). Self-drive tourism may first be required to bring a suitable flow of tourists to a location to offer opportunities for other transport modes to provide access to that location (Roberts and Hall 2001). Self-drive tourism may also have implications for the environmental sustainability of tourism (Roberts and Hall 2001). On the one hand, the relatively small numbers of people who can be brought to a region in a single self-drive vehicle may improve the capacity to manage visitor numbers to closed locations such as some national parks. On the other hand, the unpredictability of self-drive itineraries, and the environmental cost of small vehicle transport pose threats to sensitive environments. Self-drive tourism can also contribute to traffic congestion, pressure on public amenities (not only roads, but waste disposal, water use, and health and medical services). Unless a greater understanding of the nature of self-drive tourism: the markets; destination choices; travel itineraries; and resource use characteristics is developed, it will be impossible to manage both positive and negative impacts.

This book reports on a variety of research, which can contribute to increased understanding of drive tourism, and consequently assist in improving marketing and management practices.

Chapter 2 (Keeping Track of the Drive Market) examines drive tourism in Queensland as a case study. It is based on a series of extensive research projects conducted by Tourism Queensland. It highlights a number of drive tourism segments as well as the information needs and holiday preference for drive travellers. A number of research and policy implications are highlighted.

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Chapter 2

Keeping Track of the Self-drive Market

Mark Olsen

2.1 Understanding the Drive Market

There is no doubt that 'driving holidays' represent a significant tourism activity in Australia today. Preliminary figures from the National Visitor Survey (Bureau of Tourism Research 2000) of those taking overnight leisure trips in motor vehicles indicates that there are some 53 million drive holidays taken in Australia every year. That equates to around 70% of all trips taken in Australia by Australians and it represents a significant market for regional and rural areas.

When discussing drive holidays one of the first questions posed is that of the existence of a dedicated 'drive market'. Future debate on this issue will test the boundaries of working definitions and further develop our understanding of this critical market. This chapter however does not attempt to push the boundaries of the definition, rather it focuses on expanding the range of tools available to examine the drive market to fuel future debate.

For the purpose of discussion and examination the 'drive market' is simply defined as those travellers who participate in 'drive holidays'. What constitutes a drive holiday is a mix of self-identification by consumers (i.e. have you taken a drive-holiday) and examination of the market through primary research. Within this broad definition of the drive market there are without doubt a number of different segments encapsulating a range of different holiday types. This chapter will examine a range of ways in which the market can be segmented using as an example the work undertaken in Queensland, by the State Tourism Organisation, Tourism Queensland.

Queensland relies heavily on the drive market, especially in regional and remote areas where it represents up to 85% of the total market (BTR 2000). As such, Tourism Queensland has invested significant funds into primary research to gain a better understanding of the drive market, its patterns, behaviours, preferences, information sources and demographics. This research has been used both in tactical marketing responses (e.g. brochure design) and to gain a broad understanding of the drive market.

One of the most important findings to date has been the recognition that those who engage in drive holidays are not a homogenous group of travellers (Yann *et al*. 1999) but a diverse segment requiring further examination.

Outlined below is a brief overview of key findings from a number of primary research projects undertaken by Tourism Queensland. Taken together they provide a useful case example, exploring the many unique qualities of the drive market. This research examines the key questions of motivation for choosing driving holidays, the many different types of drive holidays, the information sources and habits of the drive market and the demographic profile of the market.

2.2 What Makes them Drive

While recognising the drive market is not a homogeneous segment, there are some characteristics that the various markets share. Through dedicated primary research with the drive market a number of common elements have been identified. This research was undertaken on the simplest definition of the drive market. Research participants were filtered by whether or not they had undertaken a ‘drive holiday’ in the past two years. This form of self-identification was the simplest and most effective way to segment the market in the absence of definitive research in the field. The key factors influencing travellers to take drive holidays were either ‘external’ or ‘internal’.

2.2.1 External Influences

The external environment, including the economy, one’s disposable income even the weather have been shown to have a direct impact on travel patterns and choices (Brian Dermott and Associates 2001). For the drive market this is no different. In fact, external factors such as disposable income and economic conditions are key factors in influencing travellers to choose drive holidays (Taylor, Nelson, Sofres 2001; Brian Dermott and Associates 2001).

This finding is in keeping with early examination of the market showing that drive holidays are preferred because they are a ‘cheaper option’ than other holiday types (Parfitt 1997). The impact of broader economic conditions as identified by Brian Dermott and Associates (2001) was an influence in most types of holidays, with travellers turning to more budget, often domestic travel during tight economic times.

In addition to the factors that contribute to taking a drive holiday, a number of factors act as barriers to taking drive holidays.

The key external barriers identified included: the relative price of other types of holidays, the lack of perceived benefits of drive destinations, lack of information or provision of misinformation, and employment opportunities (Taylor et al. 2001). These barriers and influences provided a real insight into the psychology and motivations of the drive market. The influences guide the choice of a drive holiday, however as identified in the Parfitt (1997) work there are a number of different groups and behaviour types in the drive market.

Looking only at the external influences it would be easy to assume that the drive market is a reflection of tough economic times, and employment status. However, exploration of the internal influences paints a slightly different picture.

2.2.2 Internal Influences

Internal influences such as desires and motivations have been shown to influence destination choice. Research into the drive market by Trimble (1999b) showed that there was a distinct desire or motivation to take drive holidays and that drive holidays fulfilled a need for the market that could not be satisfied by other forms of holidays.

Trimble (1999b) identified that drive holidays embody a ‘sense of freedom’ or ‘independence’ that attract the traveller to choose this form of holiday. Further, Trimble (1999b) identified a certain mind-set within those who identified themselves as taking drive holidays, considering themselves as ‘travellers’ not ‘tourists’. This separation from mainstream tourism is a significant finding and is demonstrated in their actions including preferences for ‘real experiences’ and ‘local information’ as opposed to things that on appearance seem ‘touristy’ (Trimble 1999b).

Building on the work of Trimble (1999b), further focus group testing was done by Taylor et al. (2001) with the over 50’s segment of the drive market. This work identified a desire for a mix of ‘active’ and ‘passive’ activities, which were fulfilled by drive holidays (Taylor et al. 2001). Overall, the research of Trimble (1999b) and Taylor et al. (2001) suggests that more than just an economic imperative, drive holidays represent a unique holiday experience that is sought after by segments of the travelling public at certain times in their life.

Analysis was undertaken in 1999 by Yann, Campbell, Hoare and Wheeler to examine the elements affecting the choice of types of drive holidays. The research methodology included a telephone interview with 313 drive holiday makers and two focus groups. This research suggested that within the market seeking drive holiday experiences, there are a number of sub-groups that have preferences for a number of different styles of drive holiday. A significant finding of this work was the strong correlation between lifestyle segments (families, singles, etc.) and the type of drive holiday taken (Yann et al. 1999). This work however did not identify any correlation between lifestyle and choosing a drive holiday.

At this stage in the research, drive holidays are beginning to display a range of complexities along with a number of unifying factors, which draw them apart from other types of holidays. This includes a range of sub-groups within the broad definition of the drive market. These sub-groups are defined by the types of drive holidays they take, which are also linked to the time spent away and potentially their lifecycle, age and employment status.

2.3 Types of Drive Holidays

Exploratory research into the drive market in the Gladstone and Capricorn regions of Central Queensland, which rely heavily on the drive market, highlighted the obvious complexity and diversity of the drive market (Parfitt 1997). Further work by Yann et al. (1999), showed that the drive market may be segmented by length of journey. This break-down is consistent with the findings of earlier destination marketing research undertaken for South East Queensland, which identified a ‘short-break’ market (AGB McNair 1997). That is a drive holiday where the participants are away for less than three days, travelling within a 400km radius for ‘recharging’ holiday experiences.

The work of Yann et al. (1999) took this work a step further and identified not only a short break market but examined potential differences within the remaining 'long-haul' drive holiday. The work of Yann et al. (1999) identified three trip types in the drive market, touring (multiple destinations), A to B travel (with stops), and A to B travel without stops. This finding creates four separate drive holiday types based on length of trip, whether it was a multiple or mono destination holiday and the distance travelled. Even for the most experienced tourism researcher this is a complex mix of interactions.

Adding to the complexity, the work of Yann, Campbell, Hoare and Wheeler, also identified a link between lifecycle and type of drive holiday taken. That is, those with young families were more likely to travel A to B with stops, older retired couples were more likely to take extended drive holidays and younger working couples more likely to take short breaks or short tours (Yann et al. 1999).

2.4 Getting Information to the Drive Market

A defining element of the drive market, reinforcing its unique qualities, is the level of reliance on certain information sources, and the level of planning prior to travel compared to other holiday travellers (Trimble 1999a; Yann et al. 1999; Taylor et al. 2001; Parfitt 1997).

The work of Yann, Campbell, Hoare and Wheeler showed that within the drive market there are further differences in terms of the type and level of information sought. Focus groups and survey research with drive market consumers indicated that the drive market have two distinct phases of information collection, pre-trip planning and information gained on the journey (Yann et al. 1999; Parfitt 1997).

2.4.1 Pre-trip Planning

While extensive planning of the main route is a key part of drive holidays, some aspects of a trip including which towns to visit, where to stay and what activities they undertake are primarily made 'on the road' (Yann et al. 1999). This planning behaviour is consistent with the desires of those on drive holidays for a sense of freedom and the flexibility sought from a drive holiday. Further, the amount of planning has been shown to be directly linked to the length of trip for the majority of those on driving holidays (Market and Communications Research: MCR 2002). That is, the longer the trip the more planning is done. While there will always be exceptions to the rule it is quite logical to expect that those taking longer journeys, travelling further from home will do more planning. The focus groups run by Taylor et al. (2001) showed that the over 50's drive market consider pre-trip planning one of the most enjoyable parts of a drive holiday.

Before departing home the drive market relies mostly on one or more of: Automobile clubs, State Tourism Organisations, word of mouth, and the Internet as sources information (Trimble 1999a; Yann et al. 1999; Taylor et al. 2001; Parfitt 1997). An estimated 65% of self drive travellers went to their motoring organisation and looked at maps as the first points of reference (Yann et al. 1999). Following this, information was usually gathered from the State Tourism Organisations in the form of brochures and travel guides.

Word of mouth has a strong influence on consumer decision making and was found to act as a filter to brochures, guides and maps (Yann et al. 1999). Again, the information sources used differ depending on what sort of information is desired, for attractions and places to visit, the State Tourism Organisation, word of mouth, motoring organisations and travel guides are the main sources of information in that order (Yann et al. 1999). Whereas for route information the motoring organisations are the principal contact followed by maps, then the State Tourism Organisation.

Pre-trip planning is undoubtedly an important part of the drive holiday experience but it has also been revealed to be an avenue for improved performance in the drive market. The work of Yann et al. (1999) showed that good pre-trip planning information along with adequate road signage can lead to visiting more attractions, better time management and higher satisfaction with the overall journey. This is an important point for State and Regional Tourism Organisations attempting to get the most from the drive market.

In the melee of information sources, brochures, guides, maps, logos and images that the drive market are bombarded with they often seek a ‘one-stop shop’ (MCR 2002). One method applied in a number of areas to address the competing demands of different areas or regions is the use of tourism themed routes. These corridors pull a range of experiences under a single product banner that is directly linked to the activities of the drive market. Working examples include the Matilda Highway (QLD), Explorers Highway (NT/SA) and the Great Ocean Road (VIC) to name a few. While the research has shown that the drive market respond well to tourism themed routes (Yann et al. 1999; MCR 2002) what is not known at this stage is how many themed routes the market can bear.

2.4.2 On the Journey

On the road, sources of information are much different to those used before leaving home. The majority of research discussed here tends to indicate that this is where Visitor Information Centres (VICs) play a key role (Taylor 1999). The research by Taylor (1999) indicated that the drive market is looking to meet a local and find out the ‘real’ (not touristy) information. Also, the VIC is seen as a place to find out about some of the regions ‘secrets’. The research shows that effective VICs have the ability to improve the experience and to a small degree increase length of stay in a region (Taylor 1999). This is an important finding for those involved in regional tourism. The VICs can therefore be seen as the first line of attack in delivering the best experience on the ground and represent a real opportunity to secure a competitive advantage in the drive market.

Consistent with the findings on pre-trip planning, certain places are seen to provide better information for certain activities. For example the VICs are seen as the best place for information on attractions and activities (Taylor 1999). When looking for direction, the visitor places a higher level of trust in motoring authority maps, Main Roads signage and the Visitor Information Centre staff than tourist brochures (Yann et al. 1999).

The desire for ‘freedom’ inherent in the drive holiday means that little more than the first and last nights accommodation is booked and only around 40% actually travel the route they had originally planned (Yann et al. 1999). It is information collected on the route from places like visitor information centres that can change drivers’ plans (Taylor 1999).

2.5 Demographic Characteristics of the Drive Market

While no specific research has been undertaken to test the correlation between demographics and an affinity with drive holidays, the research is clear that lifecycle (most often linked to age) does contributed to the preference for different types of drive holidays (Yann et al. 1999). Looking at the major data sets and the primary research there are some trends in demographics, especially age, lifecycle and work status that are common in the drive market.

In the Queensland example, the drive market is primarily over 45 years (CM Research 1999), travelling as a couple (from analysis of the QVS, QTTC 1990), and evenly split between male and female participants (Yann et al. 1999). This overall picture, however, does not show the diversity or complexity of the segments of the drive market. This ‘big picture’ view is valuable for an initial assessment and guide but further segmentation is required to effectively target the drive market.

The research currently available highlights that the drive market demonstrates a range of unique qualities, which may separate it from other forms of tourism. Those participating in drive holidays have their own channels of communication, including a heavy reliance on word of mouth, they demonstrate a clear motivation for this type of holiday experience and it potentially appeals to a certain demographic or a number of demographic groups. This information however could be in danger of existing in a research vacuum without the guidance of comparison over time or comparison with other groups of travellers. This is where a strategic context is required.

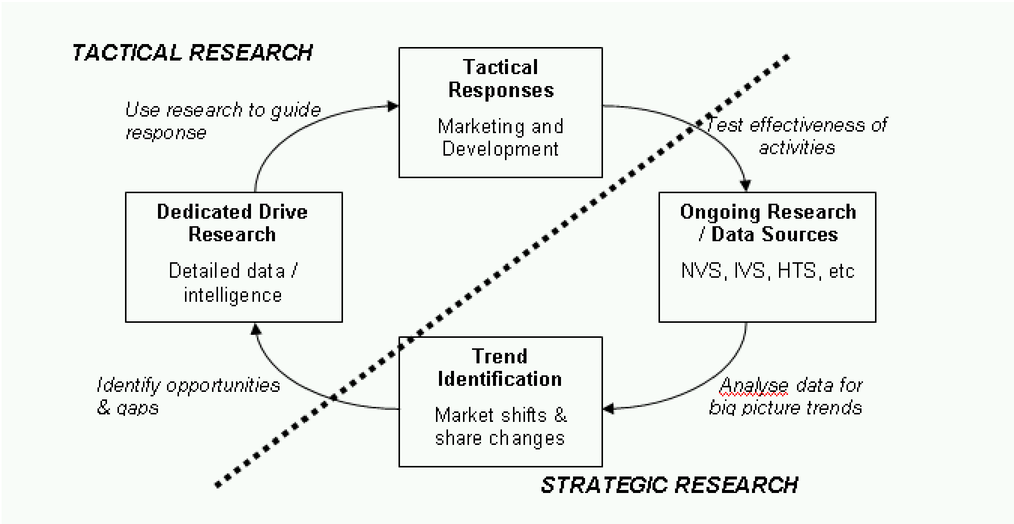
2.6 A Strategic Approach to Marketing Drive Tourism

The primary research outlined in the earlier section of this chapter has provided a much clearer understanding of the motivations, information collection habits and demography of the drive market. Detailed analysis of the primary research presents an opportunity to respond tactically in marketing and development to the needs of the drive market. The value of this activity in the broader scheme of tourism marketing and development and the effectiveness of such activity is not immediately clear from one-off primary research. What appears to be missing is the ‘big picture’ view of market trends and a clear understanding of what constitutes the drive market so it can be compared with other segments.

To gain a big picture or ‘strategic’ view of a market typically involves time-series analysis across a range of sectors. While there is not dedicated data set for the drive market, the existing data sets of the National Visitor Survey (NVS), International Visitor Survey (IVS) and the Holiday Tracking Study (HTS) discussed in chapter one do provide an excellent State and regional picture of the drive market. Most tourism practitioners are aware of the limitations of the major data sets and examination of the drive market is no exception.

In the Queensland example, these data sets have been used to great effect, within the broader research context. That is: the information is never examined in isolation, it is always drawn from and compared back to the primary drive market research. Figure 2 outlines the research framework applied in Queensland as a model for drive market evaluation incorporating both dedicated and ongoing data sources.

Figure 2: Drive Market Research Model



The ‘tactical research’ approach outlined in Figure 2 is highly effective in developing tactical responses to opportunities/challenges identified. The question is how were these opportunities/challenges identified and how important is a reaction in a time when resource allocation is strictly monitored and maximum efficiency is the order of the day.

2.6.1 Strategic Analysis of the Queensland Drive Market

The basic premise of ‘strategic analysis’ as described in this chapter is to utilise readily available longitudinal data to identify big picture trends. The information drawn from existing data sets can complement the information collected through dedicated drive research to assist in further segmenting the market, monitoring trends, identifying big picture opportunities and measuring the effectiveness of activities in shifting market share. In essence the strategic research assists in identifying ‘what to do’ and the dedicated research highlights ‘how best to do it’.

To begin drawing information from the current data sets a standard definition for the ‘drive market’ needed to be developed. This definition had be a balance between concerns of academic rigour and the limitations of the existing data sets. From the research and the markets self-identification with drive holidays, the key elements of the definitions includes:

- the main form of transport used is the motor vehicle (either privately owned, borrowed, or rented);

- the main reason for travel is either holiday or visiting friends or relatives (VFR) excluding business and education travel; and
- day-trips are excluded due to the frequency of travel impacting on the usefulness of the data.

Thus the working definition of the drive market adopted by Tourism Queensland are those:

> travelling away from home for at least one night, on holidays or visiting friends and relatives, in their own, a rented or borrowed vehicle, as the primary mode of transport.

This definition provides an opportunity to further segment and examine the drive market drawing on the dedicated drive research. However, simply developing a definition yielded immediate results in the ability to clearly define what was and what wasn't the drive market, how it compared to other markets and how it had changed over time. The following is an overview of the data drawn from the key data sets using the above definition.

2.7 The Australian Drive Market

Whether looking at intrastate or interstate travel the motor vehicle is still the predominate means of transport for non-commercial trips. Both the Holiday Tracking Survey (HTS) and the National Visitor Survey (NVS) indicate that around 70% of all trips taken in Australia are taken by car, 4WD, caravan, campervan and motorbike.

In total, around 53 million drive holidays are taken in Australia every year. Of those around 17 million are away for at least 4 nights (32%) the rest are on short-breaks (1–3 nights). Of those staying over 4 nights 90% are by Australians and 10% international. Around 22% of all international visitors to the country engage in drive holidays (IVS 1999). In Queensland this figure is around 20%. Within a number of key markets that figure is much higher. For example of the 330,000 'United Kingdom' and 'other Europe' visitors that come to Queensland almost 50% drive. These figures provide the first opportunity to put the drive market into perspective at a national level. In comparison the domestic travel market that fly to their destinations represent only 7 million per annum (NVS 2000).

In the Queensland example the drive market is worth an estimated $4.4 billion in visitor expenditure and represents around 70% of all trips taken within and into the State (NVS 2000). Applying the above definition to the NVS, Table 4 below highlights the share of the 'drive market' across the States and Territories and the changes from 1998 to 2000.

Table 4: National Drive Market

State	Total* (000's)	Share (%)	98–00 (000's)	Growth (%)	Share shift (%)
QLD	10,704	20.0	1551	14.5	1.9
NSW	18,398	34.4	362	2.0	–1.3
VIC	13,154	24.6	12	0.1	0.5
SA	3,991	7.5	508	12.7	0.2
WA	4,447	8.3	549	12.3	0.6
NT	386	0.7	41	10.6	0.0
TAS	1,277	2.4	–71	–5.6	–0.3
ACT	1,177	2.2	105	8.9	0.1
TOTAL	**53,538**	**100%**	**2,968**	**5.5%**	

This simple analysis provides the ability for States/Territories to begin tracking progress in the drive market on a national level. As identified in the earlier research (Parfitt 1997) we know, the drive market is not a homogenous market, it is made up of a range of market segments and travel patterns which need to be understood to be effective in working with the drive market.

2.8 Further Analysis and Segmentation of the Drive Market

Drawing on the dedicated drive research it is possible to identify a number of key elements that define segments of the drive market. An initial sieve of the research highlighted three directly measurable elements that distinguished the drive market that were also readily identifiable from the existing data sets, they included:

- length of trip;
- lifestyle segment; and
- multiple or mono-destination travel.

Each of these is explored in more detail in the following section including a summary of some of the outputs generated from the major data sources.

2.8.1 Segmentation by Length of Trip

Length of trip was identified through the focus groups as impacting on trip planning approaches (Yann et al. 1999). Further examination of this form of segmentation was provided through the Productive Marketing Approach (Brian Dermott and Associates 2001) work. The Productive Marketing Approach used cluster-based analysis to identify segments in the Holiday Tracking Survey and the National Visitor Survey. While this work was not specific to the drive market, it sought to identify segments across the broad tourism market.

The cluster analysis identified three discrete drive market segments (each with drive as the dominate form of transport) entitled 'Short Breaks', 'Big Tour' and 'Grand Tour'. These segments had differentiated holiday patterns, however one of the main defining factors was the total length of time on holiday (BDA 2001). Tourism Queensland further analysed the National Visitors Survey using the established drive market definition and identified similar differentiating patterns in total trip length. From this four core trip length segments were introduced as the first level of drive market segmentation, these are:

- Short Break (1–3 nights)
- Short Tour (4–7 nights)
- Big Tour (8–21 nights)
- Grand Tour (22+ nights)

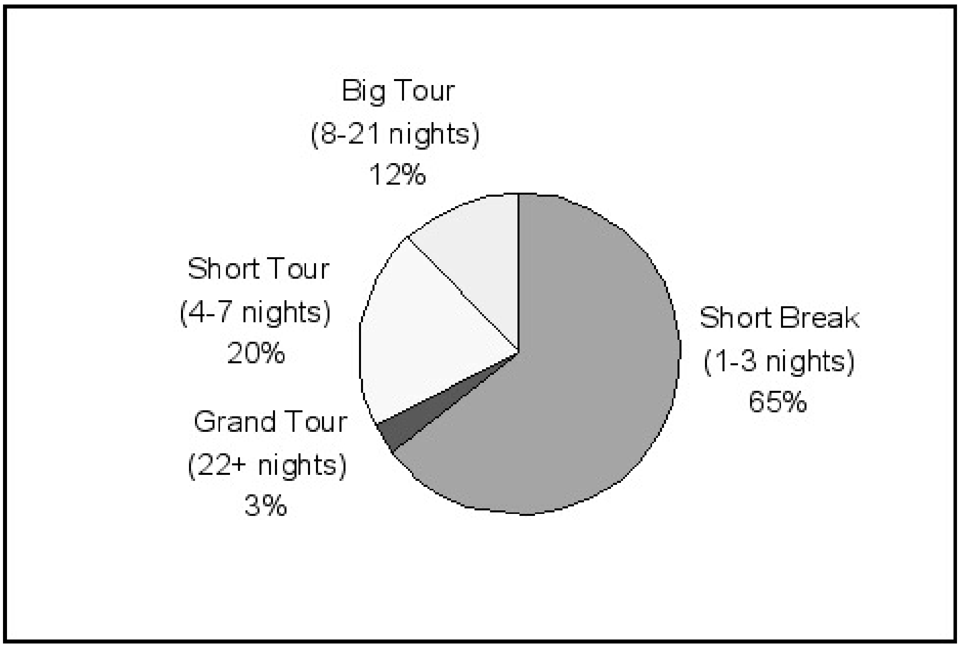
This segmentation supported previous Destination Marketing research and corresponds with the typical trip packages provided for by organisations such as RACQ. In applying this first sieve to the NVS, the following results were compiled for Queensland.

Table 5: Journey Length Segmentation (Queensland Only)

	Visitors/Numbers			**Value/Yield**		
	Number 2000	**%**	**Growth 1999–2000**	**Total 2000 expenditure**	**Growth 1999–2000**	**Average spend per traveller**
Grand Tour (22+ days)	308,000	2.8	1.7%	$598 million	8.9%	$1,942
Big Tour (8–21 days)	1,314,000	12.3	1.6%	$1.3 billion	9.7%	$1,042
Short Tour (4–7 days)	2,179,000	20.4	15.4%	$1.1 billion	29.1%	$506
Short Break (1–3 days)	6,903,000	64.6	6.5%	$1.3 billion	1.9%	$194
Total Drive Market	10.7 m	67%	7.5%	$4.4 billion	11%	$412
Total Qld	**16.1m**	**100%**	**–1.6%**	**$9.5 billion**	**5%**	**$594**

In further examining the Queensland drive market (which is relatively similar to the national profile) it is clear that the dominant segment of the drive market is the short break market in terms of volume (see Figure 3).

Figure 3: Segmentation of the Queensland Drive Market



The ability to break the drive market into manageable sized chunks and identify the predominate travel patterns is of great interest to regional areas that do not have a large short break market. Also, this segmentation provided an understanding not only of the composition of the drive market, but also of its patterns and behaviours. From the time series it is possible to draw conclusions on the growth in the Short Tour Market, which can then be validated by referring back to the primary research.

2.8.2 Segmentation by Lifecycle

The Road Travellers Study (Yann et al. 1999) for the first time gave firm evidence to the belief that within the drive market are three identifiable segments. The largest segment identified were those who 'meander' stopping off where they please (54%), followed by those who stop merely to break the journey (37%) and those who drive straight through to their destination without stopping (9%).

This study also highlighted a strong correlation between household structure and type of travel with Young singles and families with school aged children most likely to drive from A to B. Young Couples and pre-school families were more likely to stop off to break up the journey and Older adults and older singles most likely to take their time and stop wherever they please.

This research is supported by the cluster analysis work undertaken by Brian Dermott and Associates in an unpublished report to Tourism Queensland (Brian Dermott and Associates 2000). This research examined both the National Visitor Survey and Holiday Tracking Survey to identify segments including a number of drive market segments.

Tourism Queensland uses this segmentation to monitor and track changes in the national ‘drive market’. It allows a more detailed examination of changes in the drive market and shift-share analysis. In terms of practical application, this form of segmentation may allow greater understanding and tracking of the impacts of the baby-boomers. The baby boomers have been identified as a potential growth market with preferences for holiday types that may be suited to drive holidays (Muller & Cleaver 2000).

2.8.3 Mono versus Multiple Destinations

The Road Travellers Research (Yann et al. 1999) highlighted the existence of three main drive holiday travel patterns: Touring (multiple locations); A to B travel with stops; and A to B travel without stops. The third kind of drive holiday is primarily utilising the motor vehicle as a cost effective transport mode and could be subject to mode substitution if the price of alternative forms (e.g. air) were to be reduced.

While recognising the fundamental importance of this distinction and the research evidence of its existence this form of segmentation is subject to the significant challenge of finding a data set that includes such information to track and monitor changes. Therefore, in the Queensland experience this form of segmentation is only available from one-off research.

2.9 Further Research

The work shown in this chapter in understanding, mapping trends and segmenting the drive market is the only a small portion of the potential for further examination of the drive market. The analysis has in many cases raised more questions than it has provided answers. Areas for exploration within the bounds of what is currently collected are almost, limitless. The few that have been identified include further analysis of the NVS to provide a distinction between multiple and mono-destination drive holidays, tracking the flow of visitors by corridor and developing data sets to influence road infrastructure planning.

As highlighted in the discussion on segmentation, one of elements identified in the existing primary research, which defines different types of drive holidays, is the choice to travel to multiple destinations as opposed to having a single destination focus (Yann et al. 1999). While recognising this trend, the current data sets do not make such analysis easy. It is possible however to manipulate the unit record data of the National Visitor Survey to identify those visitors which had multiple stops along the route as opposed to those travelling straight through.

This information would allow further examination of the drive market that would have application for example in the areas of feasibility assessments for attractions along major corridors. With such information the A to B no stops traveller could be removed from the target market to give a more realistic indication of the target drive market.

Information that is of great use and interest to regional tourism areas is the flow of visitors and their changing trends. This information can assist in numerous areas from tactical responses like billboard placement to measures of effectiveness of route marketing campaigns. Early work in this area can be found in Clark and

Black (1998), examining the flow of visitors through the outback region of Queensland.

This research however relied on dedicated primary research, which is expensive and as such cannot be done on a regular basis. One potential response is the development of a ‘visitor flows model’ using the NVS data in concert with Main Roads counts, Visitor Information Centre data and other key regional tourism statistics to maintain an active count of the number of visitors on any major section of road at anytime.

The visitor flow model is only limited by the availability of data but could potentially provide monthly or quarterly corridor estimates utilising a Geographic Information Systems (GIS) platform. This information could also have application in influencing road infrastructure planning.

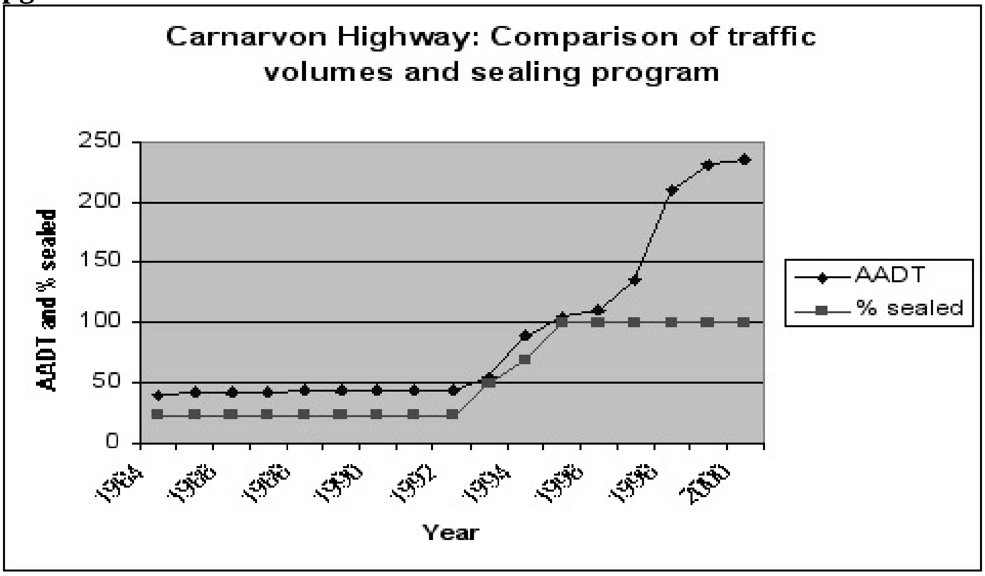
Road infrastructure provides essential access for visitors to destinations. For regional areas road infrastructure and access are vital to the success of burgeoning tourism industries. To date tourism’s input to, and affect on, road infrastructure planning has been ad hoc at best. The challenge in impacting on road infrastructure is two-fold, firstly there is a need to be able to present data that is comparable to other industries to demonstrate the cost/benefit of investing in road infrastructure to benefit tourism. Secondly, and most importantly, is demonstrating the broader economic and regional development implications of tourism to the road engineering fraternity.

The Strategic Tourism Roads Study (2000) which was a co-operative project between Tourism Queensland and the Department of Main Roads, which followed work undertaken by the Cameron McNamara, Tourism Priority Roads Study (1988) and the work for the Tourism Task Force, Tourism Transport Needs Across Australia (1996). This work highlighted that despite its importance to the State economy, tourism did not figure greatly in road infrastructure planning in Queensland. The study highlighted that the triggers for upgrading roads for the Queensland Department of Main Roads revolved around the quantum of heavy and light traffic not so much the value. On this criterion even the most bullish estimates of visitor growth on key corridors would not justify road upgrades.

On the other side of the equation, evaluation of traffic counts around key tourism assets such as Carnarvon Gorge demonstrate a strong correlation between road sealing and increased traffic (see Figure 4).

Figure 4 clearly shows the growth in traffic (AADT) on Carnarvon Highway, a key access point for Carnarvon Gorge in Queensland, as the road was progressively sealed from 1992 to 1996. While this does not relate directly to visitors there is potential to use the ‘visitor flows model’ discussed previously to link overall traffic growth to visitors. This can then be examined in terms of an increase in visitor numbers as a result of road sealing, the resultant estimated increase in expenditure and potentially utilising the Tourism Satellite Account to estimate job creation. Armed with this information the tourism industry may be in a better position to lobby for road upgrades to benefit the growth of the industry.

Figure 4: Carnarvon Gorge (Injune to Rolleston) Total Traffic versus Road Upgrade



2.10 Conclusion

The drive market and drive holidays represent a significant contributor to tourism in Australia, especially regional tourism. Despite this, little detail was known about this important market prior to a wave of primary research since the late 1990's. This research has provided tourism practitioners with a real insight into the motivations, planning activities, information sources and demographics of the drive market. This series of one-off research around the country, and especially in Queensland has identified the existence of a certain mind-set attached to 'drive holidays'.

While the definition of what constitutes a 'drive holiday' and whether there is such a thing as the 'drive market' are still open for debate what is known is that there are a number of sources to gain better information and intelligence about the drive market at our fingertips.

Utilising existing information from the National Visitor Survey, Holiday Tracking Survey and the International Visitor Survey provides practitioners with the ability to expand their view of the drive market from a detailed view provided through one-off research to a more strategic view. This more strategic view includes time-series data on a national level, which allows market shift-share analysis, examination of trends and potentially analysis of visitor flows.

Such information provides tourism practitioners for the first time with a national picture of the drive market, its size, contribution to the economy, and comparison with other segments of the tourism equation. While more work needs to be done on forming a standard definition of what constitutes the drive market, opportunities for application of the outcomes continue to arise including input to road infrastructure planning, tests of effectiveness of activities in the drive market, and opportunities to better target market segments.

Chapter 3

Drive Tourism and Special Interest Tourism

Ros Derrett

3.1 Introduction

Regional Australia has a timely opportunity to deal with the growing Special interest tourism (SIT) markets. Some individuals and groups are seeking customised leisure and recreational experiences. While SIT may be a new term, it is not a new phenomenon. Special interest tourism is ‘the provision of customised leisure and recreational experiences driven by the specific expressed interests of individuals and groups’ (Douglas, Douglas & Derrett 2001). People have long visited specific destinations for specific experiences associated with a predilection for a particular passive or active pursuit. Some return regularly to engage with experts in appropriate environments for specific rather than general educational, leisure, adventure and restorative reasons.

Growth in the SIT has been identified (Hall & Weiler 1992) particularly in farm and regional, adventure, cultural, heritage and event tourism. SIT, like other tourism sectors, is market driven. There is expanding demand for viable products to satisfy the needs of enthusiasts who ‘travel with a purpose’. Regional entrepreneurs, communities and government agencies may wish to satisfy the drive special tourist’s desire for authenticity and real experiences that offer them active identification with host communities in a non-exploitative manner.

Inside the cars, buses and on bikes travelling to regional Australia are curious people. Their curiosity has been raised because of their special interest and their expectation that flexible, personalised service can be accessed. They want an active and conscious relationship between themselves and their hosts, as individuals and communities, in a way, which doesn’t degrade the quality of life of either (Douglas et al. 2001).

Read (1980) suggests that SIT is the hub around which the total travel experience is planned and developed. Participants identify strongly with their chosen activity and through this the pursuit of serious leisure. This involvement provides a way of finding personal fulfillment. According to Naisbitt (1990:195): ‘The 1990s were characterised by a new respect for the individual as the foundation of society and the basic unit of change’. As individuals take to the roads of Australia they can assist enterprises, communities and regions in revitalising their image, their products and services.

3.2 SIT and Self-drive Tourism

Individuals have special interests. Some individuals are happy to share these interests with others during their travel experiences. Some prefer to limit the number of people with whom they come into contact while on holidays. They concentrate their time, energy and other resources on satisfying a specific leisure pursuit that allows them to engage with like-minded specialists. Regions that can provide specialist experiences like fly fishing, fossicking, bird watching, photography or gourmet regional cuisine need to consider all aspects of the individual visitors experience.

Such visitors are not always looking for ‘bargains’. They like to read material before they go somewhere; they send off for everything to research the access to special activities. They rarely book ahead, but carefully plan the route. Such visitors enjoy the freedom and flexibility of drive tourism and use the local tourism information centres, along with agencies such as NRMA, RACV, and RACQ for getting good room rates (Douglas et al. 2001).

Touring by car enthusiasts have a main destination in mind for at least two night stopovers on their way or return (AMR 2000:4) or taking a holiday that has at least overnight stopovers in different locations but with no main destination. Having determined what specific interests can be satisfied, visitors indicate they like to stop and explore their chosen activity; they are not hurried and can go at their own pace; they enjoy driving and they can take more luggage (AMR 2000:45).

The lack of reliable public transport in regional Australia has meant that a reasonable proportion (>25%) of backpackers opt for self-drive vehicles for some of their trip to pursue their specialist interest. Bikes and motorbikes are also an option (TNSW 2000). Self drive cars, rental cars, campervans and sometimes the purchase of a vehicle are features of this sector (Tulpute 1999). With the independence this provides, regional agencies need to ensure they provide adequate information, in time, at the right time in the decision making process with clear directions. Detailed material on specific areas of interest like heritage, shipwrecks, horse riding or healing needs to be located in the outlets identified above. This relevant information, via websites, tourist information centres, billboards, print collateral in accommodation should be waiting for the SIT drive enthusiast.

Drive tourism facilitates observation with an emphasis on sightseeing. 91% of long car touring holidays are for sightseeing (Yann 1993) with 76% of participants seeking interesting environments while 60% look for new places and activities. SIT visitors’ desire to participate allows them to access diverse local interesting visual arts, crafts, theatre music practice and special events and festivals for authenticity, ritual, and spectacle.

Tourists with particular interests readily access the Internet. SIT service providers need to offer more information via the web and encourage direct contact prior to meeting their guests. Both parties come with greater expectations with explicit information on sites, destinations, services and personalised contact. This medium addresses the needs of individuals with opportunities for attention to detail, e.g., special diets, numbers of groups for tours, customised tourism experiences, although this requires them to know the level of the individual's skills, commitment and resources.

The SIT drive market represents changing demand patterns. Read (1980, cited in Hall & Weiler 1992) suggested that SIT or REAL tourism comprised four major elements, *rewarding, enriching, adventuresome* and *learning* experiences. These people journey to find the unfamiliar (Urry 1990). *What* is visited (such as monuments and artistic events) is being replaced by tourist demand for *how* destinations are visited (Wood 1992). The demand for shorter, more frequent and more intensive tourism experiences can lead to high yield options for regional tourism operators where visitors are prepared to spend more, but stay for shorter periods. This can provide a better return for tourism investment.

There is an increasing link between holidays and personal interests developed at home. The tourism experience then becomes an opportunity to exploit those interests more intensively. Holidays become an essential part of a holistic lifestyle, which includes changes of scenery and climate, but complements established special interests. Existing operators need to better understand their customers and seeks from them information which would enhance the return visit and encourage positive word of mouth. By contacting existing SIT groups through their home base, their newsletters, their web listings, magazines and other networks, their relevant needs can be established and satisfied by regional operators and marketers.

Regional operators need to observe the changes in SIT visitors' family life and generational responsibilities, broader economic and lifestyle changes, together with their greater expenditures on leisure pursuits. Many are time poor but money rich consumers who will demand satisfaction and personal development from precisely tailored, flexible products. Retirees, for example, are free to travel throughout the year and with a wide range of incomes, will have different demands from the fraught executive who will have a two to three night window of opportunity.

The mix in products and services available in regional Australia needs to take this into account. Individual special interest tourists like to satisfy their curiosity, learn more, appreciate beauty, collect things, improve themselves, express their personalities and receive approval from others. They generally wish to be first in everything and be recognised as authorities and influential, so as to have a good story to tell of their experience when they return home. The sorts of benefits they seek include filling their increased leisure time with value for money experiences. They expect a high standard of service and resulting personal prestige or social/cultural advancement from their commitment to specific 'cutting edge' activities. There is an element of fashion or trend setting in consumer motivations. The self is at the centre of modern consumer society. It ties together issues of choice, identity, status and culture (Douglas et al. 2001).

Those providing SIT services need to address the key principles of quality customer services. Knowledgeable staff are required to deliver accurate interpretation of sites, understanding of the limitations to over-use of property, sensitivity to land ownership issues and appreciation of cultural heritage. Clear, simple and truthful collateral and signage must be present to direct potential customers to the properties and services. Partnerships with other elements of the tourism system to facilitate packages are required. Fundamental to all this is an acknowledgement of the connection between tourism and such specialist areas as indigenous culture, visual arts, conservation of the natural environment and local history.

For the drive tourism sector SIT offers community contact. Community, the custodians of the content of Australian tourism, must be enabled to participate in tourism by forming its content. Only if Australians are involved in tourism will it survive. This is a substantial premise for the development of tourism sensitive to the concerns of the host community. The drive SIT market generally recognises that cultural tourism is the art of participating in another culture, of relating to people and places that have a strong sense of their own identity. It is an approach to tourism that gives tourists credit for intelligence, and promises them some depth of experience and real-life layering that can be explored on many levels.

Regional and rural communities need to work to establish a dynamic that will make them attractive not only to the residents but also to visitors. Those aspects of community life which visitors may find attractive become commodities and the resultant commercial imperative can bring tension. Especially vulnerable are communities that have developed festivals and events that reflect the lifestyle choices of the residents. Festivals that have amused and entertained locals for generations are now being recognised as opportunities to promote towns, share a specific local pursuit and provide economic gain for communities.

The Jacaranda Festival in Grafton in regional New South Wales was established in the 1930s. Beef Week in Casino commenced in the early 1980s to highlight the importance of a local industry. Both community based non profit volunteer organisations find that the annual programming of each event now has as much to do with tourism marketing as it does with the traditional community cultural development and fun making. So, they can target specific segments of their annual (and often repeat) market and exploit the contact for the niche activities included in their event programs, e.g. dog shows, veteran car rallies, art and craft exhibitions.

The SIT drive market provides an opportunity for partnerships between various stakeholders. When opportunities to revitalise a community arise, for example, by placing an art and craft outlet in an unused railway station, or opening a museum with a collection of memorabilia to a local hero or offering locally grown produce at functions hosted by a local tour operator, they may be undertaken by non-profit community based organisations. These are attractive to the drive market. Events such as agricultural shows, rodeos, car rallies, fishing competitions and sporting fixtures commenced generations earlier may be revitalised in the light of increased interest from domestic and international drive tourists wanting to do what the locals do.

3.3 The Rainforest Way Example

Effective strategic planning, management and marketing will ensure that while the SIT drive market can be agents of change; each community needs to establish thresholds with which they are comfortable, so that they can manage the resources and the communal will appropriately. Increased special interest tourism activity has significant implications for regional economic development. Not all members of the community have the same attitude at the same time, to the same specialist pursuits, even over the same locations.

An area that is preparing such a focused approach to the SIT market is the Northern Rivers of New South Wales and South East Queensland. There is a cooperative project that crosses State borders and regional councils for the mutual benefit of all stakeholders and addresses some of the special interest tourists needs. The proposed *Rainforest Way* and its associated loops and trails will provide enhanced themed experiences for visitors to the region. A common vision *to develop and promote a primary touring route with complementary experiential loops and trails through Northern Rivers NSW and South East Queensland to provide enhanced experiences for visitors and greater environmental, cultural, social and economic benefits for the cross border regions* has been adopted.

Throughout regional Australia there are opportunities to connect individuals with special interests to a raft of regionally specific activities in distinctive and appropriate locations. Planners need to encourage responsible and sustainable development that respects the values of regional stakeholders and communities. This requires consistent, clear, well interpreted routes to expose SIT visitors to sites and experiences like forest walks, gem-fields, alternative technology and agriculture, health retreats, markets for arts and crafts or artists' studios and local produce.

The hinterlands of Northern Rivers New South Wales and South East Queensland regions have both been identified as having significant potential for tourism growth through their rich diversity of natural and cultural attractions. This area shares many common themes, embracing national parks, hinterland, World Heritage Sites, indigenous culture and resident lifestyles.

One of the major attractions of the region is the natural environments and World Heritage listed sites. The Mount Warning shield volcano provides a dominant influence on the landscape that moves from lush tropical rainforest to expanses of eucalypt forest and mountains with sheer rock faces. Collectively the region's World Heritage Sites are referred to as the Central Eastern Rainforest Reserves Australia (CERRA). The CERRA includes some of the major tourist attractions of the region including, Mount Warning National Park, Border Ranges National Park, Nightcap National Park (NSW), Lamington National Park and Springbrook National Park (QLD). Their significance as an area of immense natural attraction is sometimes lost due to the geographical spread of the individual sites and the fragmented marketing practices of the region, especially in the lack of cross border cooperative marketing. This is a significant challenge.

The *National Visitor Survey (NVS)* indicated that in 1999 more than 1.8 million domestic visitors travelled to the Northern Rivers region, staying more than 6.9

million nights. Most of these visitors travelled to the area by private vehicle. In addition to this a number of international tourists also visited the region. Research provided in *Tourism Trends in NSW – Northern Rivers Regional Profile 1999* supports the information provided by the NVS and adds some other interesting data on visitors to the region.

Eighty-five per cent travel to the region by private car, 2% travel by rental car, 50% of visitors are holiday and leisure travellers, 33% visiting friends and relatives, 40% stay at friends and relatives properties, 18% stay in hotel, resort motel or motor inn, 16% stay in a caravan ark or camp on private property, 3% stay in a backpackers/hostel, 48% of visitors enjoy ecotourism activities (includes going to the beach and rainforests) and 77% enjoy social activities such as visiting friends and relatives. This total market can be divided into unique market segments which have been identified as: *Ecotourists, Short breakers, Southern drifters, International drivers* and *Backpackers.* Within each segment there are people with special interests. They can be targeted and provided with tourism experiences of specific interest to them.

Fifteen per cent of nature based tourists visit specifically to experience the natural environment and 13% specifically for cultural pursuits. These ecotourists display a desire for interesting and unspoilt natural environments, visiting national parks and bushwalking, and cultural experiences such as visiting galleries and museums and attending festivals. Ecotourists are generally better educated and more environmentally sensitive. 33% of all overseas visitors to the region are also ecotourists. The area is best known for its beaches, mountain scenery, national parks and alternative lifestyles, but recognition of World Heritage by both international and domestic visitors is low.

Visitors are driving south to escape the urban density, crowds and the high-rise and tourist environments of Brisbane and the Gold Coast. They perceive the area as clean, unspoilt, underdeveloped, uncomplicated and uncrowded. They appreciate the tranquillity, simplicity, safety, flexibility and peaceful natural beauty of the environment of the region. They perceive the area as unique, interesting and harmonious, with opportunities to relax, and experience adventure and discovery with locals. They find the area casual, comfortable and convenient and the locals friendly and genuine. This ‘ambience’ needs to be packaged and translated into tourism product.

The SIT market identified includes a farm holiday experience for participants to meet farmers, get close to farm animals, swim in a creek, ride machinery, see wildlife in its native habitat, ride a horse, canoe, fish for yabbies in a dam. Along the Rainforest Way visitors can learn more of the diverse alternative cultures through health activities, sustainable permaculture/horticultural practices and regional cuisine allowing people to follow from farm gate to restaurant plate.

A substantial touring by car market exists for the region. Segments includes the well-established ‘snow bird’ market escaping the cooler climes; it includes families on school holidays with special interests; the older market; and long term meanderers. International travellers, increasing in number, travel by car, coach, train or campervan from Sydney and from South Eastern Queensland (picked up at Coolangatta/Brisbane airport). Many international visitors are backpackers who have relatively high expenditure but seek cheap hostel style accommodation while pursuing specialist activities like learning to SCUBA dive, hang-glide, horse ride, access contact with local indigenous people. They commonly travel on predetermined routes, currently the most popular is Sydney–Byron Bay–Hervey Bay–Cairns and engage in ‘adrenalin’ experiences. The sub-tropical rainforest experience and alternative sub-culture is also important to this market.

Table 6: Comparison of the Potential Market Segments to Northern Rivers

Segments	Market size (per year)	Average expenditure (per day)	Average stay (nights)	Total potential expenditure (per year)
Ecotourist	478,000	$69	4.3	$141 million
Short Breakers	648,000	$108	5	$349 million
Southern Drifters	890,000	$100	4.3	$382 million
International Drivers	83,000	$155	8.2	$105 million
Backpackers	100,100	$80	4	$32 million

Source: National Visitor Survey (1998/9) / TNSW (2000) / Tourism Queensland (1999)

A review of the key features of successful touring routes (especially for the SIT sector) and other related literature reveals that Australian touring routes, including the Great Ocean Road, The Fossickers Way, Great Green Way, Waterfall Way, Kosciuszko Alpine Way, Matilda Highway, Kakadu’s Nature Way, Dreamtime Trail, (SEQ’s) Hinterland Trail, Birdsville Track, Thunderbolts Way, Country Way, Blue Mountains Grand Circular Tourist Drive, Tasmania’s Waterways and Wilderness drives, Shipwreck Coast and Volcanic Hinterland Touring Map have the following characteristics: access, gateways, attraction complexes, nodes, road linkages, resources withheld, information, effective dynamic engaging signage, clean amenities like toilets, safe lay-bys and a knowledgeable, friendly host community.

3.4 Conclusion

Regions committing to the SIT drive market need to consider road quality, signage, travel distance and travel times and the loops and trails that provide visitors with a specific range of experiences need to demonstrate a perception of security and attractions must have ‘things to see and do’ based on research of market needs. Attractions should highlight unique features that aren’t replicated elsewhere and each of these things must be done particularly well. Drive tourists welcome nodes or hubs that represent strategically located communities that provide services, facilities, products and attractions. Protection of sensitive natural environments is particularly important where World Heritage areas and national parks form the basis of tourist drives. Promotion and education of the importance of these areas to visitors can also ensure the resources for their protection.

Chapter 4

Senior Drive Tourism in Australia

Bruce Prideaux

4.1 Introduction

The popularity of Australia's suburban life style has created a high level of private car ownership and in contemporary Australia the private car is regarded as an essential mode of personal transport. As the popularity of private car ownership has grown so has the propensity for owners to use cars as the primary mode of transport for leisure travel. Being generally poorly suited to servicing suburban transport needs, public transport has declined significantly in importance reinforcing the trend towards self-drive tourism travel. This chapter looks at aspects of the senior sector of the drive tourism market in Australia drawing on research published by the Bureau of Tourism Research (BTR) and research commissioned by the Office of the Aging Department of Families, Youth and Community Care, Queensland Government and undertaken by Wei and Ruys (1998). This chapter focuses on both the characteristics of the seniors drive tourism market and problems that seniors encounter when undertaking this form of tourism travel.

4.2 Significance of the Senior Travel Market

The actual size of the senior market is difficult to determine because there is little agreement on the age cut-off that marks seniors from other groups of travellers. For example, the Federal Government allows people who retire from the age of 55 years to have access to their personal superannuation investments. However, males do not qualify for a pension until they reach the age of 65 years while females can currently retire at age 61 years and six months and receive a government funded aged pension, although this cut-off is being gradually increased to 65 years to bring it in line with the male cut-off. In another government scheme, persons aged 60 years and over are able to enrol for a Seniors Card that entitles them to a range of discounts on government services. The picture is no clearer in the literature, which has criticised age as a basic criteria (Tomljenovic and Faulkner 2000) and argued that cognitive age and lifestyles rather than physical age may be a more appropriate basis for developing tourist segments (Moschis 1990; Schewe 1990). From the arguments advanced in the literature and given the confusing position adopted by government it appears that any age-based criterion may not be the most appropriate method of determining a person's membership of the seniors market. However, for the purposes of this chapter age criteria have been adopted because of the structure of the data set available to the researcher.

Recent research undertaken by Wei and Ruys, found that 57.3% of seniors relied on their private car as the primary mode of holiday travel. The size of the senior market is significant and in 1999 seniors 65 years and over accounted for 12% of the nation's population. In a more liberal interpretation of the definition of the term senior using 55 years and older as the cut-off point, the BTR (1998) found that 3.18 million seniors participated in over night travel and accounted for 20% of all trips undertaken in Australia.

A study into the leisure, travel and shopping habits of Australian seniors published by AC Nielsen (1998) found that the major constraints to travel experiences by seniors were financial reasons (60%), concerns over health (23%), lack of a travel companion (19%), too many responsibilities at home (18%) and lack of time for travel (9%). The study, based on 1,181 respondents, found that seniors were more likely to travel intrastate (an average of 3.2 trips per year) than interstate (1.6 trips per year) or overseas (1.2 trips per year).

In the near future the size of the senior's market will grow as the baby-boomers generation, defined as being people born between 1946 and 1965 (Muller and Cleaver 2000), begin retiring. The impact will be felt gradually as the first baby-boomers commence retiring at the minimum age of 55 years in 2001 and will accelerate from between 2011 onwards as the initial wave of post war children turn 65 years of age and become eligible for government funded aged pensions. This generation of seniors will represent a profound shift in the level of demand for tourism goods and services. Compared to the current cohort of seniors who are members of the of pre war generation, baby-boomers are likely to have greater personal wealth on retirement because of greater access to superannuation funds and their ability to accrue greater personal wealth during the last half century of relative prosperity. Pre War retirees had relatively restricted access to personal superannuation schemes and are more likely to rely on government funded pensions for the bulk of their income.

Recent projections by the Australian Bureau of Statistics (1997) predict that the number of seniors in Australia will grow to 4 million by 2007 and 7 million by 2051 when seniors will represent approximately 32% of the population. In comparison, the number of persons in the 15 to 44 years age group is not expected to increase during this period.

The fall in net national fertility rates to below replacement levels, common to most developed countries, has created the situation where the percentage of retirees in the population will grow over coming decades creating a powerful market sector. Boosted by access to superannuation funds and already well aquatinted with travel the coming generation of baby-boomer seniors will create new markets for tourism goods and services and importantly, have the personal wealth to consume travel products on a scale not possible for the current generation of seniors. This shift in both market power and market size will create new opportunities for the tourism industry; however, this new market will be sophisticated, well travelled and likely to demand higher levels of service than past generations of seniors. It is also likely that baby-boomers will be more environmentally aware placing new demands on the tourism industry to focus on energy conservation, waste disposal and sustainable practices in their business practices (Prideaux, Wei, and Ruys 2001).

4.3 The Drive Market

Seniors have a high level of motor vehicle ownership with 60% of seniors owning at least one vehicle (Ruys and Wei 2001). It is possible to discern two major forms of drive tourism; travel from an origin point to a destination where the car is used primarily as a mode of transport, or where the route along which travel takes place becomes the primary focus of interest. It is also possible to argue a third form where drive tourism is a mix of the previously described cases.

The drive tourism market can also be divided into market sectors based on the purpose of the research. For example, a demographic classification my divide the drive market into a 17 to 30 year old group, 31 to 54 year age group and 55 years plus, or permutations of age brackets according to the purpose of the study. It is also useful to classify market sectors on distance criteria such as day-trippers, interstate and interstate. Purpose of travel is also another useful method for developing market sectors and includes VFR (visiting friends and relatives), leisure, holiday, or similar. Tables appearing in this chapter are based on data supplied by the BTR. In most cases data is segmented into three aged defined categories (up to age 44 years, 45–64 years and 65 years and over). As argued previously, 65 years may not be the most appropriate category by which to judge membership of the seniors market sector, however, given the constraints of the data set the 65 years plus cut-off is used in this chapter.

4.4 Structure of Drive Tourism

The structure of drive tourism differs considerably from other forms of tourism that may focus on a particular type of activity or on a specific class of location such as a seaside resort, historic city, capital city, national parks or spas. According to Prideaux (2001) the major elements of drive tourism are:

- The road and all of the associated activities required to build and maintain it;
- Accommodation which includes motels, farm stays, caravan parks, camping grounds, Bed and Breakfasts, self catering units or apartments and hotels;
- Refuelling facilities which supply petroleum, gas and diesel as well as food and, in some jurisdictions, alcoholic beverages;
- Information, usually consisting of roadside signage, tourism information centres and brochures;
- Enforcement of road rules and regulations by police;
- Vehicle repairs and recovery;
- Attractions that target highway travellers as their prime source of customers; and

- Promotion of on-road attractions.

In Australia the significance of drive tourism has been recognised by all state tourism marketing authorities and a range of specialised brochures and other promotional media are used to promote self-drive leisure travel. For rural areas the access to drive tourists has created new investment and employment opportunities and many peripheral areas have been able to attract public sector grant funds to establish new attractions. Examples include the Stockman's Hall of Fame in Western Queensland and the Queensland Heritage Trails Network. Development of tourism attractions of this nature has also attracted private investors who are responsible for the provision of Tourism product infrastructure which is defined by Prideaux (2002) as the fabric of supporting tourism orientated businesses that include attractions, accommodation, food and beverage service, shopping, recreation, entertainment, festivals and sites of tourism interest.

4.5 Characteristics of Senior Drive Tourism in Australia

Participation by seniors in drive tourism in Australia has been researched by Wei and Ruys (1998). This research presents a comprehensive snapshot of the size and structure of the market as well as the views of seniors on significant issues. As both surveys were designed to identify only the views and patterns of the current cohorts of seniors the likely intensions of baby-boomer seniors is unknown.

Research conducted by Wei and Ruys (1998) gives a comprehensive outline of the views of seniors on a number of aspects of the seniors market and is reported in summary form:

- *Information Sources.* In order of importance, and based on use of multiple information sources, the most importance sources of information were: word-of-mouth from family, friends and other seniors (60.4%); pamphlets and brochures (58.3%); travel agents (57.1%); travel brochures (56.4%) and; Seniors Card business discount directory (55.1%). The significance of print media compared to electronic media should be noted and must be a major consideration when determining promotional campaigns and appropriate distribution channels.
- *Seasonal Travel Preferences.* The most popular period of travel is in the July-September period (74.4%) followed by April-June (53.1%) and October-December (27.8). Further, travel undertaken during school holidays (7.8%) was less popular than travel outside of school holiday periods (38.8%) or anytime (28.8%).
- *Mode of Transport.* Seniors rely on their car as their primary mode of transport (61.5%) followed by public transport (24.4%) and tour coaches (9.8%).
- *Other Significant Issues.* Seniors travel to learn and experience new things and to visit friends and relatives. Budget constraints were the most frequently cited reason for limiting or preventing travel. Health issues were also a major constraint to additional travel. In some cases the poor health of the respondent's partner precluded travel. Issues of

comfort were important and included accessibility, size of signage and availability of facilities such as toilets. As the age of the traveller increases issues of this nature become increasingly important.

The National Visitors Survey (BTR 2000) provides a comprehensive picture of some aspects of drive tourism including travel habits, socio-demographic characteristics and trip characteristics on a longitudinal basis. The National Visitors Survey is conducted on an ongoing basis throughout the year with data collected from respondents via a telephone survey. Data presented in the following tables includes all age groups thus providing a valuable basis for comparison of a range of variables apart from age. Analysis is restricted to a discussion of the significance of senior's participation in drive tourism although the data covers all forms of transport and in most tables, age groups other than seniors.

The data divides travel by road into self-drive, which includes rental vehicles, and other road which describes coaches. Collectively, the tables indicate that seniors prefer self-drive to other modes of transport. After self-drive the preferred forms of travel are by air followed by coach. The general pattern of usage indicates that as distance increases seniors, in common with other tourist sectors, substitute travel by road with air travel.

Table 7: Percentage of Transport Mode Selection for All Age in 1999 (Number of Overnight Trips)

	Self-drive	**Other road**	**Aircraft**	**Long distance train (non-suburban)**	**Ship/ boat/ ferry**	**Other transport**	**Total**
15–19 (%)	48.38	64.52	39.70	6.28	4.59	0.74	100.00
20–24 (%)	46.63	75.11	45.49	5.36	7.57	1.67	100.00
25–29 (%)	43.41	76.58	51.89	4.14	6.35	0.99	100.00
30–34 (%)	42.56	74.29	48.90	3.42	4.49	0.79	100.00
35–39 (%)	42.06	72.40	43.94	3.01	4.13	0.86	100.00
40–44 (%)	47.21	66.51	41.35	3.57	1.57	1.39	100.00
45–49 (%)	47.92	65.04	44.18	2.29	0.98	0.51	100.00
50–54 (%)	53.26	60.01	45.80	3.39	1.94	0.38	100.00
55–59 (%)	53.05	61.07	53.20	3.32	2.12	1.02	100.00
60–64 (%)	54.35	57.70	48.70	5.06	4.81	0.08	100.00
65–69 (%)	60.59	54.53	52.46	6.18	4.15	0.73	100.00
70 & over (%)	57.94	50.56	44.89	5.81	3.05	0.27	100.00
Total (%)	**47.87**	**67.94**	**47.00**	**4.02**	**4.10**	**0.89**	**100.00**

Source: National Visitors Survey (BTR 2000)

Table 7 indicates the use of transport modes by age group for travel in Australia. From this table it is apparent that self-drive transport is only marginally more popular than air travel in the 55 years and over market segment. Of the total number of self drive trips, the 55 years plus group accounted for 23.2% of all trips while the 65 years and older segment accounted for 5.2% of self drive journeys.

Table 8 groups travellers into three age categories and subdivides each category into four journey types. Short breaks indicate overnight trips that might be undertaken over a weekend. Short tours may be up to a week in duration while longer tours may extend up to the usual length of a persons annual leave entitlement. A grand tour refers to a much long journey that may extend over several months or more. While short breaks are most common for all age groups, Table 4.2 shows that senior drive tourists tend to longer trips than those in other age groups.

Table 8: Percentage of Self-drive Tourists in Age Groups by Length of Trip in 1999

Trip length	Junior	45–64 years	65 years +	Total
Short Break	75.54	71.72	56.12	72.39
Short Tour	16.90	18.09	25.77	18.17
Long Tour	6.80	8.83	13.71	8.12
Grand Tour	0.76	1.37	4.40	1.32
Total	**100.00**	**100.00**	**100.00**	**100.00**

Source: National Visitors Survey (BTR 2000)

Income distributions for senior drive tourists also identify characteristics of the market. For seniors aged 65 years and over, 62.2% had a yearly income of between $8,300 and $25,999 (excluding respondents who either refused to answer this question or did not know). This compares to the 45–64 year age group where only 22.9% of respondents received an annual income of this level, the majority having a higher level of income. Seniors with income levels below $8,300 were unlikely to travel while the largest number of visitor nights were consumed by the $8,300 to $15,599 income group followed by the $15,600 to $25,999 income group. It is apparent that income restraints are a major factor in determining the type, location and length of stay of seniors undertaking travel.

4.6 Conclusion

This chapter outlines the extent of senior travel in Australia focusing on drive tourism. Disposable income as well as a range of other factors including health and the propensity to travel, determines the participation of seniors in drive tourism. In the near future it can be anticipated that newly retired baby-boomers will change the existing patterns of travel by seniors, however, the extent of any change and the new demands likely to be created are currently unclear. This change in the consumption habits of seniors will have significant implications for the tourism industry and those operators who service the drive market.

From the research reported on in this chapter it is apparent that there are a number of gaps in our understanding of the structure and operation of the self drive market as it applies to seniors. Further research could for example be directed towards identifying new market opportunities that will emerge as the members of the baby-boomer generation commence retirement travel. Other areas of interest and of economic significance include the role of caravanning in self drive tourism, special needs of seniors undertaking self drive travel and changes that may have to be made to travel distribution systems.

Chapter 5

Regular Revisitation in Caravan Parks

Kathy Marles

5.1 Introduction

> I've been coming to this caravan park for Christmas holidays since I was two months old. I haven't missed a year. Our family has 13 sites in this caravan park – my two brothers are here, five cousins, my parents, nephews and daughter. This is our family's gathering place. This Christmas was small – we only had 40 of us here for Christmas day lunch. Usually we have more, up to 80 of us – all sitting here on the banks of the river – beautiful. My grandparents used to come here. They were the first. They came in the days when there was no bridge and they used to pile onto the punt. We've been coming here ever since – 50 maybe 55 years. My sister lives in Alaska now, but every two to three years she comes back to have Christmas in the caravan park at Brunswick Heads.
>
> *JD (52) Brunswick Heads, December 2000.*

For some Australian families, the summer holidays start by hitching the caravan to the back of the car or packing up the tent. The family then heads to the nearest beach or waterway to set up camp. For many of these families the annual Christmas school vacation is spent at the same caravan park and often, on the same campsite. This holiday pattern is loyally repeated for many years, especially while the children are of school age. In some cases, it is repeated from one generation to the next, so that the family sojourn to the caravan park for the Christmas school holidays becomes a long held family tradition. In 1999, it was estimated (Bureau of Tourism Research National Visitor Survey) that 5.5 million domestic overnight trips involved caravan parks or camping grounds as the main form of accommodation. This represents approximately 8% of the total tourism market in regional Australia.

This chapter presents a case study of regular repeat visitation during the summer holidays in caravan parks in Queensland, New South Wales and Victoria. Virtually all of these travellers arrive by private vehicle. This chapter provides an in-depth examination of one drive tourism segment and indicates the depth of motivation of drive travellers, an area that is relatively under-researched in the literature.

The case study is drawn from the authors doctoral thesis that was developed in two parts. Firstly, a baseline study of caravan parks of the eastern states of Australia was conducted to indicate the size and nature of this group of repeat caravaners. Secondly, it explores the relationship between place and community attachment and the frequency of visitation, through a face-to-face in-depth survey of caravaners conducted on site.

5.2 Repeat Visitation

While each holiday is a new and unique experience, many find comfort in returning to the same destination, especially when the previous experience was a good one (Ryan 1995). The phenomenon of returning to previously visited holiday destinations is not new. Some have favoured destinations that they visit regularly, while others may have visited a destination only twice in a lifetime (Ryan 1995; Oppermann 1997, 1998, 1999). People in the pre-industrial ages often travelled to the same summer villa or spa bath (Murphy 1985; Lynch & Veal 1996; Leiper 1995). Those with holiday homes also return frequently to the same destination (Coppock 1977; Downing and Dower 1973; Henshall 1977; Murphy 1985). Another group among the repeat visitor is the recreational hobbyist, such as the fisherman, horse rider or snow and water skier, who have favoured and oft frequented sites of recreation (Watson, Roggenbuck and Williams 1991; Watson, Williams and Daigle 1991; Moore 1994; Ramthun 1995; Beeton 1999; Vaske 2000). A repeat visitor might also be a person who visited a destination in their youth and has returned as an older person. Many backpackers return to the places visited in his/her youthful travels, and nostalgia lures many to return to the previously visited destination (Horna 1994; Lynch and Veal 1996).

However, it is the regularity of the repetition along with the loyalty to the destination, the caravan park and the specific campsite that sets this group of caravaners apart from most other tourists researched to date. The habitual nature of the vacation behaviour raises questions about the motives behind the decision to return to the same destination. Of initial interest is the intrinsic mobility of the caravan and why families forego this mobility for the stability of the same destination. These families are loyal to the caravanning/camping lifestyle and also loyal to a specific destination, repeatedly choosing the same holiday rather than exercising alternative options. It is also of interest that people would return to a previously visited destination, given the vastly increased number of destination options available to the modern tourist. Today's consumer has an array of holiday types and destinations from which to choose (Weaver & Oppermann 2000). As such, significant reasons must lie behind the choice to revisit a destination rather than seek out a new one.

As frequency of visitation varies, the motivating factors that drive the revisitation are unlikely to be uniform across or within any of the traveller market segments. In addition, they are likely to be multifaceted, suggesting a complex interaction of factors that impact on the holiday making decision. Some motivating factors would seem self-evident. For example, satisfaction with previous visits, ease of access to the destination, and known expectations of a familiar destination may be among such motivations (Gyte and Phelps 1989; Mazursky 1989, Watson, Roggenbuck and Williams 1991; Ankomah & Crompton 1996; Oppermann 1997). Children's happiness with the holiday choice (Ryan 1992; Lawson 1991; Wiegand 1991; Cullingford 1995) and the time taken to relax may also be influences on the choice to revisit a destination. Given a certain degree of familiarity with a destination, the risk of having an unsuccessful holiday may also be reduced (Bello & Etzel 1985; Gitelson and Crompton 1984; Ryan 1995). Thus repeat visitation may simply be motivated by convenience and risk aversion, in addition to variables such as proximity to the destination, satisfaction with previous holidays at the destination and general knowledge and familiarity with the destination.

5.3 Place and Community Attachment

More subtle motivations may be in force, particularly with habitual repeat visitors. Familiarity with a destination changes the experience and the expectations of that experience. It is also likely to change the relationship with the host community (Ryan 1995). Thus the more often a holiday is held at the same destination the more comfortable and at ease the tourist will feel. Over time a sense of belonging and ownership may develop. This feeling of ownership, or of belonging and being at home, manifests into an emotional attachment to the geographical space or the destination of return.

One theory that may be applicable to this type of repeat visitation is place attachment. Place attachment studies explore the emotional attachments that people have to geographic locales. It states that a sense of belonging to a place develops over time and influences the way people define themselves. In essence, an individual feels at home and endows the physical space with personal meaning (Tuan 1977; Proshansky, Fabian & Kaminoff 1978; Buttimer 1980; Stokols 1981; Feldman 1990). Thus, place attachment is based on past experience and may explain the motive for repeat visitation to a single destination.

Place attachment theory also encompasses social interactions within the context of the geographical locale. It indicates both emotional bonds to the physical place and social bonds to the family and community that interact with the individual within that place. The theory suggests that individuals who participate in varied activities within the community form deeper place attachment bonds (Jordan 1980; Feldman 1990; Halseth 1993; McCool & Martin 1994; Hawkins & Backman 1998). Similarly, familiarity with other holidaymakers and repeated shared experiences facilitates the development of a community spirit, and a sense of belonging to the people in the place. Therefore, place attachment is intensified by the level of involvement and commitment to the community within the place (Hay 1988; Feldman 1990).

The habitual repeat caravaner is unique in several aspects. While they belong among the self-drive and the domestic markets, their loyalty to the one destination sets them apart from most others in these groups. It also makes them unique among the repeat visitor, who may have visited a destination only twice in a lifetime (Oppermann 1997, 1998b, 1999). Nor does their behaviour mimic that of the traditional caravaner, who is more of a rover. The habitual nature of the behaviour raises questions with respect to the incidence of repeat visitation and to the factors that motivate visitors to return to the same place time and time again.

5.4 Case Study

This study was conducted in two stages. Firstly, it was necessary to establish the magnitude of the phenomenon of interest. Thus the initial phase of investigation aimed to establish the prevalence of repeat visitation by caravaners and campers in Queensland, New South Wales and Victoria during the Christmas school vacation period. Secondly, it was aimed to form a link between the level of visitation and the level of place and community attachment. Thus the second stage of the research explored these issues of attachment in relation to visitation. It consisted of a survey of caravaners and campers within parks that reported high levels of repeat visitation during the Christmas season.

5.4.1 Stage 1: Baseline Study

Methodology

The baseline study aimed to determine the incidence of repeat visitation in caravan parks during the Christmas school vacation. All caravan parks in Queensland, New South Wales and Victoria were approached. In total, 1828 questionnaires were mailed to caravan park managers in September 2000. Follow-up contact was established by telephone and was conducted in the months of October and November 2000. A response rate of 42% (765 questionnaires) was achieved. Of these, 54 caravan parks identified themselves as non-tourist parks and were eliminated from any further analysis. Thus, 711 useable questionnaires (39%) were analysed. Queensland showed the lowest response rate. This is probably due to the fact that in much of Queensland the peak tourist season does not occur over the Christmas period. The respondents of this stage of the research provided the subjects from which the second stage subjects were drawn.

Results

The survey questions were targeted at managers to identify information about repeat visitors during the Christmas holiday season only. As the primary aim of the research was to establish the incidence of this type of visitation, it was necessary to define a repeat visitor. Firstly, a distinction was drawn between a repeat visitor and a regular repeat visitor. The definition of a repeat visitor allows for a person to have visited a destination only twice in a lifetime. These visits may have occurred 20 years or more apart. The category of regular repeat visitor was established to allow for someone who returns to the same destination in a more regular pattern. In this sense a regular repeat visitor is someone who visits the same destination over consecutive years. A second consideration was that people might have departed from their usual routines during the Christmas holiday season of 1999/2000 due to the millennium celebrations occurring across the nation. With this in mind, a regular repeat visitor was defined as someone who had stayed in the caravan park for at least three out of the last five Christmas school holidays.

Regular repeat visitation in caravan parks during the Christmas holiday season was reported by 65% of park managers. There was slightly less evidence of summer repeat visitation in Queensland. This is probably due to the fact that much of Queensland, particularly north and western Queensland, experiences the peak tourist season during the winter months. Victoria showed a slightly higher reported level of regular repeat visitation than New South Wales. Table 5.1 shows the incidence of repeat visitation by state.

Both the age of the park and ownership type seemed to influence the occurrence of repeat visitation. The older parks showed more repetition than the younger parks. Of those parks 50 years or older, 86% reported regular repeat visitation compared to 67% and 57% for parks 25–<50 years old and less than 25 years old, respectively. There also appeared to be greater regular repeat visitation in the parks that were owned by the state and local governments when compared to privately owned parks and parks under other management types. The trend with age and ownership type may in part be occurring because the older parks tended to be those owned by either the state or local governments. Therefore the regular repeat visitors may be the same ones reported in both instances. There was no evidence of a similar trend when regular repetition was examined in relation to the years of management. This may suggest that regular repeat visitors continue their loyalty to the caravan park regardless of management changes (refer to Table 9).

Table 9: Incidence of Regular Repeat Visitation in Caravan Parks during the Summer Season

	Yes (%)	No (%)	Don't know (%)
State			
NSW	69	25	6
VIC	76	21	3
QLD	47	46	7
Age of park			
< 25 years	57	36	7
25 - <50 years	67	29	4
50 yrs or more	69	11	3
Years under present management			
< 1 yr	55	14	31
1-<5 yrs	67	27	5
5-<10 yrs	67	32	1
10-<20 yrs	66	31	3

20 yrs or more	65	32	3
Park owners			
Local Government	77	20	3
State Government	94	2	4
Owner/operator	60	34	6
Other	69	25	7

The range of regular repeat visitor sites across the park population varied enormously, and approximately 5% of managers could not or did not report an incidence rate. However, one in five parks reported regular repeat visitation in 80% or more of their sites during the Christmas season, while just over 10% of parks showed regular repeat visitation in 90–100% of sites (refer to Table 10).

Table 10: Proportion of Regular Repeat Summer Visitors to Caravan Parks

Proportion of regular repeat visitors	Frequency	Percent (%)	Cumulative percent (%)
0–<10	53	12	12
10–<20	60	14	26
20–<30	48	11	37
30–<40	22	5	42
40–<50	21	5	47
50–<60	51	12	59
60–<70	44	10	69
70–<80	44	10	79
80–<90	46	11	90
90–<100	47	11	100
Total	**436**	**100**	

While Victoria had the highest proportion of caravan parks reporting repeat visitation (refer to Table 9), the average proportion of sites allocated to regular repeat visitors during the Christmas season was highest in New South Wales. Over half (52%) the sites in caravan parks in New South Wales were rented by regular repeat visitors. This figure was slightly less for Victoria (45%) and even lower for Queensland (37%).

There was a clear increasing trend with respect to the average proportion of sites rented by regular repeat visitors and both the age of the park and the type of ownership. The older parks had a greater proportion of their sites allocated to the repeat visitor market, as did the state and local government parks (refer to Table 11).

Table 11: Average Proportion of Repeat Visitor Sites in Caravan Parks during the Summer Season

	Mean%
Age of park	
< 25 years	39
25–<50 years	46
50 yrs or more	58
Years under present management	
< 1 yr	56
1–<5 yrs	47
5–<10 yrs	41
10–20 yrs	47
20 yrs or more	46
Park owners	
Local Government	60
State Government	53
Owner/operator	42
Other	37

Managers were also asked about the trends in regular repeat visitation over the last 5 Christmas seasons (1995–1999). One third (33%) of managers reported an increase in the regular repeat visitation market over the previous five-year period. Only 17% of park managers reported that there had been a decrease in the proportion of repeat visitors (refer to Table 12).

Table 12: Trends in Repeat Visitation Pattern over the Last Five Years

Change	Frequency	Percent (%)
Increase	153	33
Decrease	76	17
No change	165	36
Don’t know	68	15
Total	**462**	**100**

Managers were asked for their park management perspectives of the repeat visitation phenomenon. They highlighted the aspects of regular repeat visitation that they perceived as advantages and those they perceived as disadvantages Overall the reactions of managers to regular repeat visitation was more positive than negative.

There were several major positive aspects as expressed by managers. Managers were also appreciative that they knew their clients and many expressed that personal friendships developed between them and their customers. Another advantage to knowing the clients was that the managers could address their needs more fully. At the same time, they could also be confident in their customers' behaviour, as both parties knew what was expected of them. A further advantage that was reported was that the park atmosphere improved. This came about through a more friendly and family oriented experience. In addition, the atmosphere was also improved because the security in the park was enhanced. As the visitors were better acquainted with each and become more aware of who might be out of place in the park, a 'neighbourhood watch' mentality tended to develop. Other managers pointed to the financial security that was gained by having bookings confirmed in advance and the reduced costs due to word of mouth advertising. Some managers thought that a positive result of regular repeat visitation was that their customers were satisfied which meant that the management was providing the right services and facilities.

Table 13: Positive Aspects of Repeat Visitation as Expressed by Managers

Positive aspect	Percent of cases (%) *
Know clients	25
Atmosphere	24
Guaranteed income/bookings	23
Customers knows rules and what to expect	20
Providing the right service/facilities	19
Customer satisfaction	17
Word of mouth advertising	17
Love the area	14
They appreciate changes to the park	2

** Percentages will not add to 100% as respondents were able to answer more than once*

Over 50% of the managers reported that there were no negative management aspects of regular repeat visitation. Where managers did express concerns, several issues were raised. Customers were reported as feeling that they 'owned' the park, which impacted upon managers' decision-making abilities, sometimes inhibited new visitors and was expressed in the demand for the same site, year after year. In many cases these sites were the best-positioned sites in the park and the customers were hostile to any change to the site allocation. Managers argued that because the prime sites were taken or that the park was fully booked, new customers were denied access to the park. Further, the regular repeat visitors often visited only once a year and it was perceived that new clients may be more loyal throughout the year. The sense of ownership also made it difficult to make any changes to the park without encountering some level of opposition from the regulars. This was particularly so in parks that were increasing their cabin facilities. Others felt that the regulars were generally more demanding and took liberties with the rules of the park on the basis that they were 'friends' with the management or somehow had more rights than newer visitors.

Table 14: Negative Aspects of Repeat Visitation as Expressed by Managers

Negative aspect	Percent of cases (%) *
Inhibits new clients	20
Makes management more difficult	17
Sense of ownership	10
Demand same sites	9
Makes change difficult	7
No negatives	52

** Percentages will not add to 100% as respondents were able to answer more than once*

5.4.2 Stage 2: Survey of Caravaners and Campers

Methodology

The focus of the second stage of the study was the caravaners and campers. Specific destination points (identified from stage one) that had a high incidence (>90% of sites) of multiple repeat visitation were be used. Any small parks (<100 sites) were eliminated from the process. The aim was to establish place and community attachment as a motive underlying repeat visitation. From the initial 711 parks used in stage 1, 6 parks were selected for the second stage data collection. Personal interviews were conducted with the caravaners and campers using a semi-structured questionnaire. All three states were represented (Queensland –1, New South Wales –3, and Victoria –2), however, state was not used as a selection criteria. As many respondents as could be contacted within the time limits of the Christmas holiday season were approached. The study was conducted over two seasons, the first being the 2000/2001 Christmas/January school holiday period and the second being the year following in 2001/2002 Christmas holiday season. The total number of sites in the 6 parks was 939. On average one in four sites in the parks responded, giving a total number of responses of 226.

Results

The majority of visitors staying in caravan parks over the Christmas holiday season lived 150 km from their permanent residence. Just over one fifth lived within 100 km from the park and just over 5% lived more than 400 km away from the park (see Table 15). Thus, the majority of visitors to the caravan parks are regional, living within a couple of hours drive from their destination.

Table 15: Distance to Park from Permanent Residence

Distance from home (km)	Frequency	Percent (%)	Cumulative percent (%)
0–100	47	20.8	20.8
101–200	101	44.7	65.5
201–400	66	29.2	94.7
401–1700	12	5.3	100.0

Preliminary results on place and community attachment showed a moderate to weak positive relationship between the number of years visiting a park and the intensity of the attachment (place attachment $r = .417$; community attachment $r = .393$). That is, the intensity of the attachment feelings increased as the number of years of visitation increased. Both place and community attachments were measured from 11 Likert scaled items respectively. Simple linear regressions showed that the number of years visiting a park was a significant predictor of the intensity of the attachment (place attachment $p < .0005$ and community attachment $p < .0005$). Thus as expected, it would appear that the level of intensity of attachment increases as the number of years visited the park increases (see Figure 5 and 6). However, there are many more factors that may influence the intensity of attachment. For example, the number of years visited the park does not specify that these years be consecutive, therefore it is possible that some people may have had significant gaps in their visitations patterns. Secondly it will be necessary on closer examination of the data to explore the type of park being frequented. Visitation in parks that allow annual leases can often be quite distinct from parks that only permit casual visitors. Annual leases permit visitors to visit as frequently as possible and many treat their caravan site as their second or holiday home.

Figure 5: Place Attachment and Years of Visitation

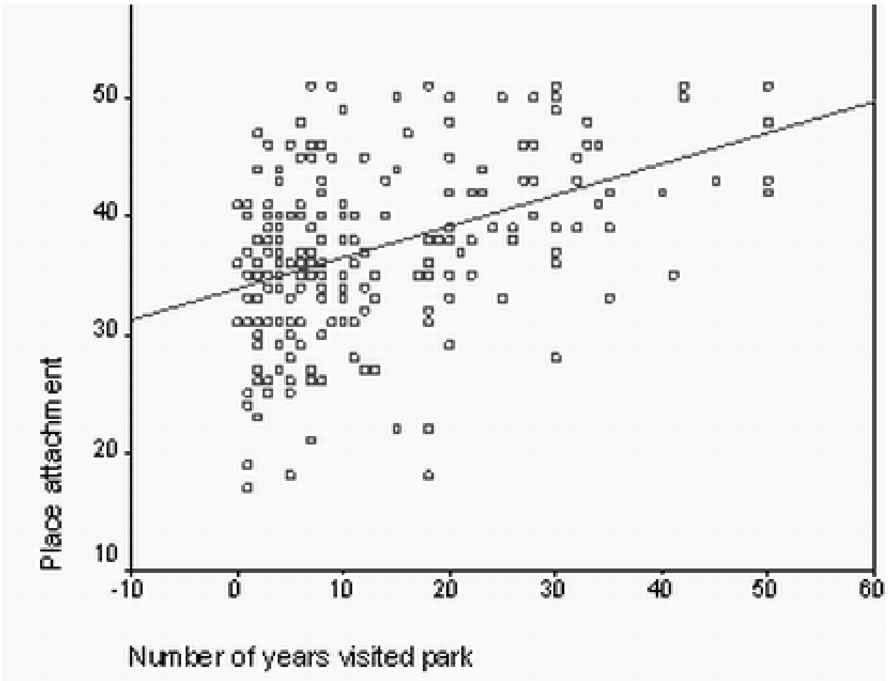
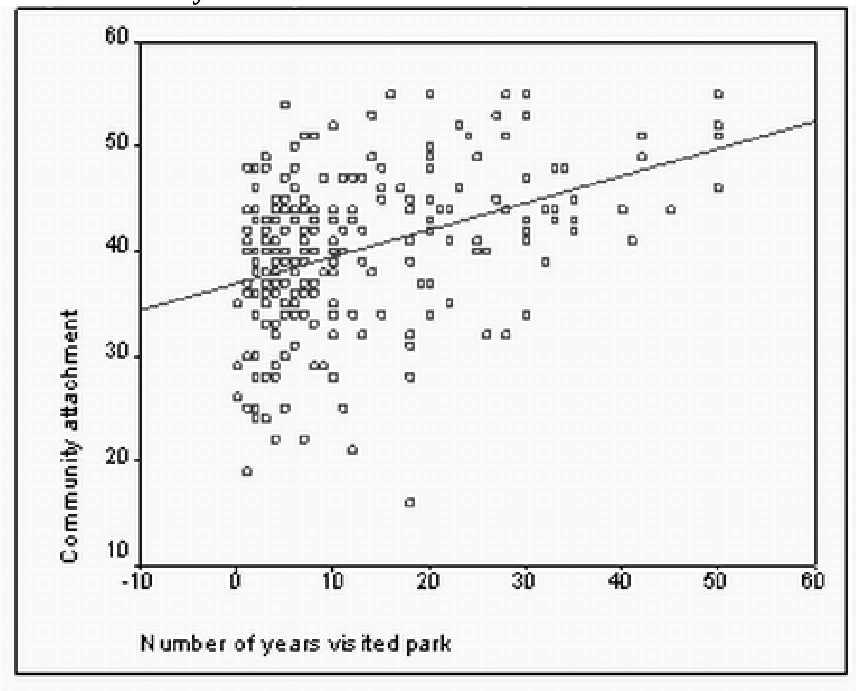


Figure 6: Community Attachment and Years of Visitation



5.5 Conclusion

Caravaners and campers who regularly visit the same destination come to think of that place as ‘home’. This has been highlighted by the managers of caravan parks as well as the caravaners and campers. Managers interpreted this in a positive and negative way. Positive, because the ‘feeling at home’ phenomenon creates a positive and friendlier atmosphere within the park and on the whole makes management easier. But negative, in that it is difficult for managers to facilitate change. This is made more complex by the fact that many of these people, who are genuinely emotionally attached to the park, are really only visiting the park for a few weeks a year, whereas the management issues are constant throughout the whole year.

The caravaners themselves highlighted their feelings of attachment to the place and the people in the place. It is often the place that attracts people back to the same destination, but as the number of visits increase over time the community within the place also becomes an attraction. Thus with very regular repeat visitation, the visitor feels at ease, facilitating a positive emotional response to the place, community and the holiday. The visitor knows what to expect, who they will be sharing their holiday with and in many senses the decision to holiday there is a low involvement one. However, it is not an unimportant decision.

Regular repeat visitation in caravan parks during the Christmas holiday season has been in evidence in some cases for more than 50 years. However, both repeat visitation and destination loyalty have only recently come to the attention of tourism researchers (Gitleson and Crompton 1984; Ryan 1995; Pritchard and Howard 1997; Gyte and Phelps 1989; Oppermann 1997, 1998, 1999; Niininen and Riley 1998). Currently there is no way of differentiating a person who has visited a destination twice in forty years from someone who has visited a destination annually for forty years. Clearly, the definition of repeat visitors encompasses both types of visitors, and clearly the motivations and experiences of these visitors will be quite different. Thus, a distinction needs to be made between infrequent repeat visitation and multiple or habitual visitation so that a deeper understanding of the motives for repetition can be facilitated. Because of this lack of attention the traditional explanations provided by the theories of motivation, destination choice and decision making fall short when applied to multiple repeat visitors.

Similarly there is a lack of research investigating the influence of place attachment and community attachment in tourism. While nostalgia and past experience as factors determining decisions have come under scrutiny, a less superficial interpretation would result if links between place and community attachment were established. Equally limited attention has been shown to short haul domestic travel, despite the possibility of this being a significant element of the market in many Australian destinations. Thus it is timely that we should be looking to drive and regional tourism as a partial salve to the problems created by terrorism and the collapse within the airline industry. People are likely to be looking closer to home for their holidays in the near future and with a very stable and loyal base the caravan industry has a good foundation on which to advance in a growing market. With a greater understanding of the motives propelling repeat visitation and the identification of distinguishing features, as strengths and weaknesses within the market place, the industry will be better able to focus their attention on their target market.

This paper has described a process for improving understanding of the motivations of a specific drive tourism market (repeat visitors to caravan parks). It is important to recognise that drive tourists not only engage in driving as a behaviour, but undertake other activities and experiences in their roles as tourist. Simply focusing on the method of transport will not be adequate in understanding how these markets operate.

Chapter 6

Cluster Marketing in Tasmania

Rowan Sproule

6.1 The Self-drive Market in Tasmania

Tasmania is a drive destination of substantial proportions in the context of domestic tourism. 49.8% of all holiday visitors used rental vehicles while in the state with a further 23.1% using their own vehicle. A further 9.8% used public transport and 6.1% an organised tour coach. This piece of action research in Tasmania shows how destination managers can develop interventions (including but not limited to signage, regional organisation and brochure ware) that can be used in a strategy for managing the benefits derived from drive tourism. The rationale underpinning these market perceptions are the size of the State and the belief that all the state and its tourism product can be experienced in a relatively short space of time.

The Tasmanian Visitor Survey [TVS] (Tourism Tasmania 2002) is the definitive source for information on visitors to Tasmania. It was first conducted in 1978 and became an annual survey from 1988. The TVS is a sample survey of approximately 11,000 adult visitors (departing after their visit) and is designed to provide a profile of the characteristics, travel behaviour, and expenditure of international and domestic visitors to Tasmania. The results of this survey show that the total number of visitors to Tasmania is estimated by systematically expanding, a position supported by independent research by the Roy Morgan Research Holiday Tracking Study and a range of other data sets from ABS and other sources.

Interstate travel forms the largest section of Tasmania’’ tourism market, accounting for 73% of all visitors in 2000/01, compared to 26% from overseas (up from 17% in 1999/00). As a percentage of all visitors, Victoria (35%), New South Wales (17%) and Queensland (9%) were the major source of interstate visitors in 2000/01. North America (10%), British Isles (6%), and Continental Europe (5%) were the major sources of overseas visitors.

In 2000/01, 420,000 visitors left Tasmania by air while 110,000 left by sea. The majority of visitors fly to and from Tasmania via Hobart (62%) and Launceston (32%) airports. 87% of sea travel is via Devonport and 10% via George Town although from September 2002 new SuperFast ferries will service only Devonport, increasing passenger and vehicle capability by 100%. These visitors disclosed that they came to Tasmania for the following purposes:

- 51.2% for leisure/holiday;
- 24.9% to visit friends and relatives;
- 14.6% for employment or business;
- 3.5% for conferences and meetings; and

- 5.7% for other reasons.

These Visitors spent some 4.8m nights in the state for an average length of stay of 9 nights, with Leisure/holiday visitors accounted for 2.5m visitor nights with an average length of stay of 9.1 nights. The total travel expenditure by interstate and overseas tourists was $552m, with leisure/holiday visitors accounting for almost half of that total.

Tasmania's tourism industry is widely geographically dispersed. It is composed of approximately 1,450 businesses, over 90% of which are small scale, employing five or fewer people.

6.2 *Tasmania's* Tourism 21 *Strategic Plan*

Tourism Tasmania 2001 is the Tasmanian tourism industry's strategic plan for the period 2001–2004. The Plan builds upon the original 1997 Strategic Plan, *Tourism 21*, which established 10 year targets of increasing visitor expenditure to $1b (1997 dollars) and raising direct and indirect employment to 26,000 jobs.

The focus of the Plan is to bridge the gap between the percentage of persons wanting to visit Tasmania (18% of Australians have a preference for a Tasmanian holiday) and the percentage who actually visit (less than 3%). The Plan aims to establish a framework conducive to converting consumer desire to visit Tasmania into actual visitation.

The Plan is based on four key strategies, to:

- improve knowledge of customers, holiday needs and desires;
- create holiday experiences to match customer needs;
- connect with and convert customers to visit Tasmania now; and
- satisfy customers with exceptional holiday experiences.

The *Tourism Development Framework* provides further direction and innovation for implementation of the Plan. The Framework recognises the reality of how visitors undertake drive tourism around the state and reflects that in a strategy framework to foster product development and marketing, sound planning and availability of supporting infrastructure.

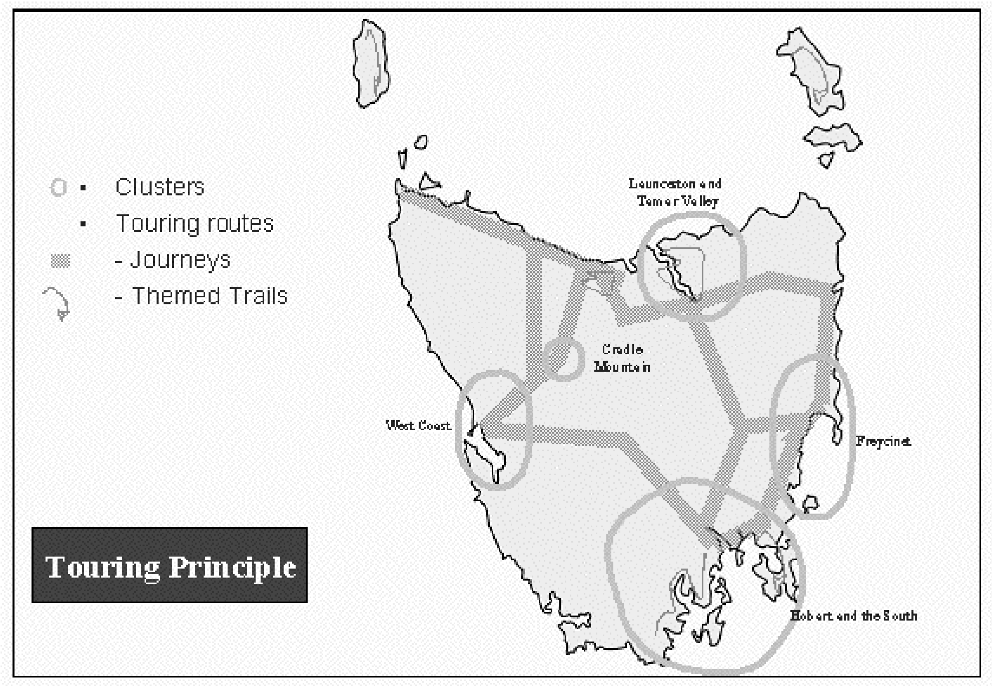
The Framework addresses tourism development from a variety of perspectives, including identification of major tourism attractions and service centres, potential development sites, and visitor centre locations. Importantly, the Framework emphasises touring routes and trails, outlining key existing routes on a statewide and regional basis. In essence, it is the embodiment of how visitors experience Tasmania – key destinations linked by touring routes.

The Tourism Development Framework defines a touring route as:

- a journey – a primary themed route between clusters; and
- a themed tourism trail – a localised special interest or themed route within a cluster or off a journey.

A cluster is a critical mass of competitive tourism product including one or more major attractions in a concentrated geographical area.

Figure 7: Tourism 21 Tourism Development Framework



6.3 Rejuvenating Journeys

Tasmania's competitive advantage in terms of touring holidays is reflected in industry initiatives to develop the journey as an important visitor experience in itself. Journeys play a role in linking not only towns and attractions, but also activities. The *Tasmanian Attractions Study* (Reed et al. 1999) noted for example, the potential for Tasmanian artists to link their activities with and tailor their activities to, the 'Journey's marketing concept'.

Strategic marketing by Tourism Tasmania aims to 'convey the sense of a great journey to our visitors.' A journey is multi-dimensional, focusing attention away from specific destinations and attractions to a whole of trip experience that involves discovery, exploration, planned and unplanned stops and a variety of experiences.

At a statewide level, the *Framework* identifies major touring routes and tourism trails. The major journeys incorporate Tasmania's principal highways, including the Midlands (Heritage Highway), Bass, Tasman, Murchison and Lyell Highways (The Wild Way).

Important themed trails include the road to the Tasman Peninsula (Convict Trail), encompassing Port Arthur via the Arthur Highway, the Huon Highway to Cockle Creek (Huon Trail) and routes around the Tamar River (Tamar Wine Route) and west of Burnie (Great Nature Trail). Further trails are being developed in other strategic locations statewide as part of regional development strategies.

Much of Tasmania's tourism attractions and services product has evolved to cater for the drive tourism market. For most visitors in planning their tours, the roads linking the various places are merely the routes to get from one attraction to another. In the perception of the prospective visitor, they are not part of the experience, but the necessary path to get from one location to another. Visitors and the product operator often come together more by chance than design.

To reduce this lack of connectivity Tourism Tasmania has initiated a number of complimentary approaches. They include the Tasmanian Visitor Information System, the development of regional touring strategies and an enhancement program for roadside facilities and scenic viewpoints.

6.4 Tasmanian Visitor Information System (TVIS)

The Tasmanian Visitor Information System (TVIS) is the holistic name given to an approach for providing consistent and clear information to visitors and prospective visitors to Tasmania.

TVIS involves integrating a number of separate elements into a systematic approach aimed at meeting the information needs of travelers at various points in the consumer decision chain. Components are linked by common themes and concepts.

The TVIS embraces the Tasmanian Holiday Planner, Regional and Themed Trail Guides, the Tourism Tasmania (http://www.discovertasmania.com) website, the 20 accredited Visitor Centres statewide, and road signage.

6.4.1 The Tasmanian Holiday Planner

Launched by Tourism Tasmania in September 1998, the publication fills the information gap that existed for many consumers when contemplating a holiday in Tasmania. In one publication the major things to see and do Statewide are highlighted, providing the information for planning a tour. The Planner is also a valuable guide for travel agents.

6.4.2 Touring Route Guides

Development of ‘rejuvenating journeys’ provides a marketing tool to position Tasmania as the country’s premier touring destination. Each touring route will capitalise on the State’s perceived competitive advantages of wilderness, lifestyle and cultural heritage. By packaging attractions, experiences and commercial tourism facilities into a series of touring guides, travellers will have a definitive publication for planning the detail of their holiday, and a reference source during the journey.

6.4.3 The Tasmanian Visitor Information Network (TVIN)

The network of 20 visitor centres, under the umbrella of the TVIN, has been developed to provide nationally accredited standards of service to travellers. The centres provide quality, statewide, 7 days a week service in key tourism destinations and on key tourism routes.

6.4.4 Road Signage

A joint initiative of Department of Infrastructure, Energy and Resources (DIER) and Tourism Tasmania and supported by Local Government Association of

Tasmania, Tourism Council Tasmania and Royal Automobile Club of Tasmania, has been underway for some two years with the express purpose of updating and improving directional and tourism feature and facility signage.

DIER funds the directional signage component of this project, and a priority program based on the Tourism Development Framework has been established. A feature of the new directional signage is the use of highly reflective photo signs in key locations statewide – typically for by-passed towns, major directional changes on the state highway network, and for significant natural attractions such as National Parks.

Tourism feature, attraction and facility signage has been redeveloped to provide a state of the art profile in authorised locations on state and local government roads. The new style of signage has been available for installation by operators since January 2001.

6.4.5 Regional Touring Strategies

The strategic growth of the Drive Tourism market product in Tasmania has been facilitated not only by the Tourism 21 industry strategy and the development of key attractions and facilities by entrepreneurs, but as well, policy direction of government has been of substantial assistance.

In addition to the TVIS initiative outlined earlier, State Government has embarked on a significant partnership program with local government designed to improve co-operation on a number of fronts, but also to put in place major and minor project opportunities designed to improve economic and social outcomes for communities.

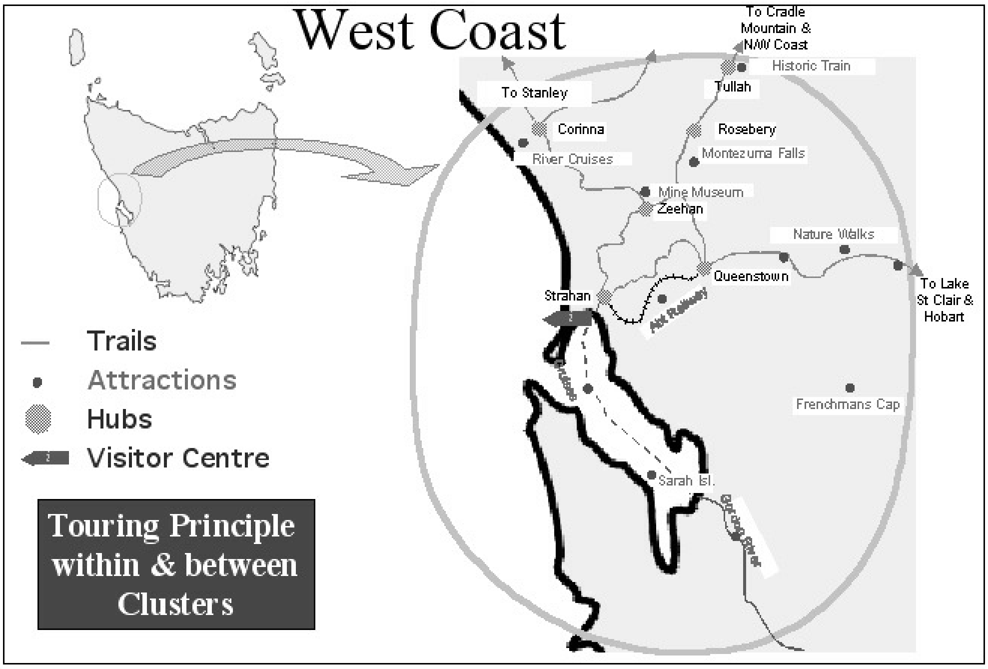
For tourism, this has enabled the development of regional growth strategies focussed on drive tourism in partnership with local government, local communities and industry players. The following are two such case studies.

West Coast Tourism Plan

It is a simple fact that tourism business development and expansion occurs because individuals or enterprises decide to invest in a particular location. The decision is invariably based on taking advantage of the particular assets and strengths of that location and opportunities to access visitors.

On the West Coast of Tasmania, private sector investment has focused on five key hubs – Queenstown, Rosebery, Strahan, Tullah and Zeehan – all of which are at different stages of development. While some are well developed and others are at an embryonic stage, all have the potential to grow and develop as part of the West Coast Cluster. The development focus has predominantly been within the discreet locations and little attention has been given to developing the experience of the journey to and through the West Coast as part of the experience of the region. The following figure outlines the location of key hubs and attractions.

Figure 8: West Coast Tourism Development Framework



As a consequence visitor servicing other than at Strahan has been relatively ad hoc with a high expectation that visitors will stop merely because they are passing through. The hubs are located on the major touring routes to and from the West Coast and carry approximately 170,000 interstate and international visitors and 40,000 intrastate visitors annually. There are opportunities for each hub to tap into the touring market and establish and/or expand tourism businesses and create jobs, but it requires product development, promotion and distribution strategies to be put in place first.

A major focus in this Plan has therefore been placed on working with tourism operators and the community in each hub to identify and stimulate specific tourism business development opportunities for their hub to attract visitors touring through the region.

The process adopted in the Plan was to identify those local community and economic development organisations in each hub that were prepared to involve operators and residents who were interested in investing their time, energy and resources in developing tourism opportunities for their hub.

Workshops were held with each hub development organisation that reviewed the overall tourism development strategy for the West Coast tourism cluster and agreed that the principal goals were to:

- Increase the range and diversity of activities and attractions to enhance the West Coast holiday experience and increase the length of stay and expenditure by visitors;
- Develop relevant marketing and distribution strategies to make visitors aware of local touring opportunities;

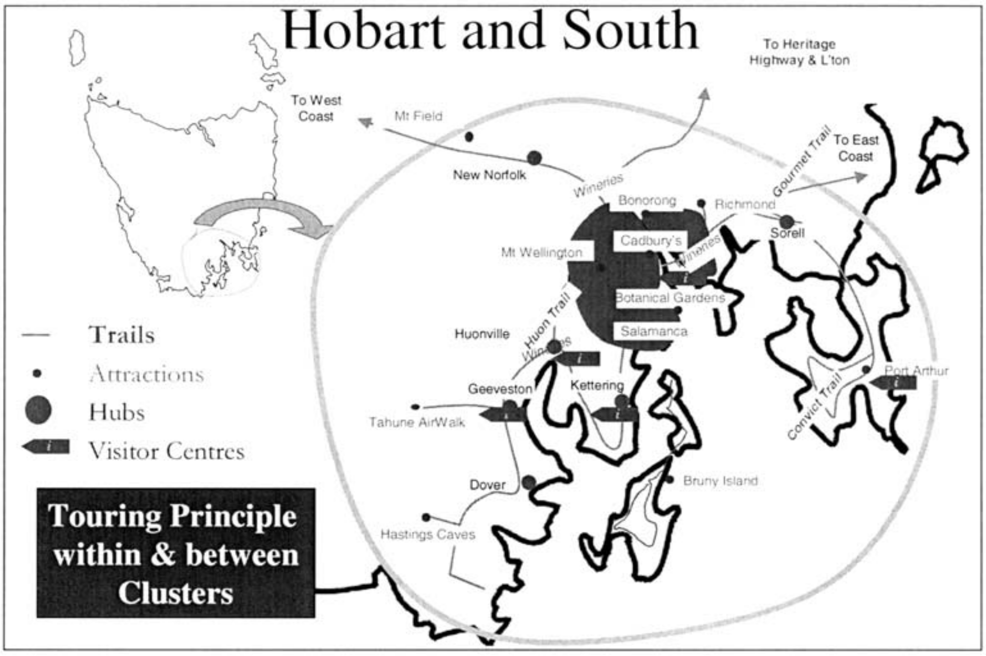
- Review the current tourism features, products and services in each hub and its visitor appeal and tourism development strengths;
- Identify priority tourism development opportunities that might contribute to these goals;
- Identify infrastructure and related requirements including visitor centres, tourism road signage, visitor pull over sites, toilet and rest areas; and
- Identify job and training needs.

The Plan has been adopted by the local industry and the West Coast Council and is now in the process of implementation. The outcome of the strategy will be an enhancement of touring opportunities for visitors to the region and a substantial improvement in the economic contribution from tourism to the local economy.

Southern Touring Route Strategy

A key strategy in the 2001/02 Southern Tasmanian Tourism Business Plan prepared by Tasmania's South Regional Tourism Association (TasSouth), the Southern Tasmanian Tourism Task Force (which represents the 12 Southern Councils) and Tourism Tasmania is to prepare local tourism plans for each of the five touring routes/trails in Southern Tasmania.

Figure 9: Hobart and South Tourism Development Framework



The strategy is based on the principle of the Tourism Development Framework and embraces the concepts of clusters, hubs, touring routes and trails as well as the application of 'Tasmanian' brand values. The aim is to integrate the range of attractions and experiences relevant to the specific hubs in each of the Council areas and along the touring routes/trails. Specifically, the local plans will coordinate market, product and infrastructure development proposals and ensure each touring route/trail has different, exciting local touring and activities visitors want to experience.

The strategy is a means to spread the benefits from tourism throughout the broader Southern Region. The ultimate outputs will be:

- Collateral in the market place which enables visitors to find out what tourism products are available through the region and provides a clear understanding of how to experience them;
- Road signage which highlights elements of the touring routes to travellers using the principles contained in the State Governments Tasmanian Visitor Information System initiative and complimenting existing themed initiatives such as the Huon Trail and the Convict Trail; and
- A strategic focus for the development of new tourism infrastructure (including supporting infrastructure such as public amenities) and product.

The strategy will:

- provide visitors with the opportunity to choose a range of activities extending over several days and for the industry to maximise visitor satisfaction and spending opportunities; and
- maximise industry, Councils and stakeholder commitment to implementing the plans.

6.4.6 Roadside Facilities and Scenic View points

The variety, standard and location of rest areas, lookouts, feature walks and other facilities at the roadside are important to tourist experience and comfort. Touring is enhanced by the provision of appropriate infrastructure, such as picnic areas, lookouts, tourist information bays and toilet facilities.

Complimenting the Development Framework, the Department of Infrastructure, Energy and Resources in partnership with Tourism Tasmania has undertaken a review of roadside facilities along the major 'journeys'. The study examined three types of facilities:

1. *Rest areas:* for example, toilets, running water, seating and shaded areas, providing drivers with an opportunity to stop, rest and refresh;
2. *Picnic facilities:* for example, barbeques, picnic areas and play equipment catering to travellers wishing to have a longer stay, including self-drive visitors; and,
3. *Feature stops:* for example, lookouts and nature trails providing visitors with an opportunity to appreciate and photograph the varied scenery across Tasmania in short, manageable stops which do not disrupt the journey. The identification of safe pull-over areas also avoids the tendency of drivers to pull over in unsafe and undeveloped locations.

The Review has identified a number of strategic opportunities to enhance visitor satisfaction and an implementation program is currently being developed as part of the state government/local government partnership program through the regional touring strategies.

6.5 Conclusion

Intervention in the market place to provide a quality visitor outcome is the intention of the Tasmanian tourism industry with its Drive Tourism Program. Without this intervention touring through Tasmania would be consigned to incremental growth based on development only in key locations by entrepreneurs. Given that poor tourism experiences can result from inadequate levels of public infrastructure and supporting programs the industry and government intervention is both welcome and necessary.

Chapter 7

The Great Green Way

Christian Ware and Samuel Budge

7.1 Introduction

This chapter offers lessons for others interested in promoting to drive tourists. The primary mechanism being used to promote the Great Green Way is a brochure. The brochure provides information about the various attractions the region has to offer; a tourist style map of the region; information about travelling times and distances; helpful tips regarding safety issues and how to treat the environment; and contact details of the tourist information centres within the region.

The brochure campaign was launched to coincide with the Christmas school holiday period in December 1996 and has continued to operate since then. Distribution of the brochures has been primarily through tourist information centres, petrol stations, caravan parks, the RACQ and other motoring organisations, and car rental agents. In addition, the Great Green Way has also been promoted at various holiday and travel shows, camping and caravan shows, fishing expositions, and 4WD shows.

This campaign has been developed with the aim of increasing the length of time visitors spend in the region, and is aimed at two key target markets:

1. Self drive visitors to the region (both domestic and international); and
2. Local residents of both Cairns and Townsville taking short breaks (Great Green Way Action Plan 1996/97).

7.2 Background

Davidson and Wiethauft (1989) identify a trend within the destination marketing field whereby increased accountability is being demanded of those responsible for regional tourism promotional campaigns. It is against this emerging culture of greater accountability that this study of the Great Green Way promotional campaign is based, with the primary aim of the study being to provide an indication of the campaign's success as justification for its continued financial support and backing from the region's various tourism industry stakeholders. Success here can be measured by increased visitation to attractions and/or extended stays.

Various studies have been conducted investigating the profile of those most likely to seek destinational information (primarily in the form of brochures and maps) from visitor information centres, or to request such information prior to the commencement of their travels. Research by Fesenmaier and Vogt (1993) and Fesenmaier (1994) revealed that the majority of interstate self drive travellers in the USA tended to undertake a low level of information search prior to leaving their homes and a high level of information search once en route, the second of these studies finding that only 28% of respondents visiting Illinois consulted travel information sources before leaving home whilst 54% obtained travel information en route. These findings have important implications with respect to the timing and distribution points at which destinational information targeted at self drive tourists should be made available.

Wicks and Schuett's (1991) study of potential travellers who requested brochures via the mail revealed that brochures were an important source of information for travellers on shorter weekend breaks and day trips, whilst Gitelson and Crompton's (1983) study in Texas revealed that brochures were used to a significantly greater extent by those travelling longer distances and by those on trips of longer duration. The findings of Gitelson and Crompton were partially confirmed by Etzel and Wahlers (1985) who found that those undertaking trips of longer duration had a greater propensity to seek destination related information.

Fesenmaier, Vogt and Stewart (1993) found that the style of travellers most likely to be influenced by destinational information collected en route fell into three categories; those on short breaks close to home, those touring (or self drive holiday makers), and outdoor recreationalists. Etzel and Wahlers (1985) indicated that those seeking destinational information tended to have higher trip expenditures and spend a longer period of time on vacation. Destinational information appears to be more sought after by educated and/or affluent people (Gitelson and Crompton 1983; Etzel and Wahlers 1985, Tierney 1993; Etzel and Wahlers 1985). It also appears that action-oriented as opposed to relaxation-oriented vacations (Gitelson, and Crompton 1983; Etzel and Wahlers 1985), and by those seeking a well planned vacation (Gitelson and Crompton 1983), tend to seek out brochures more enthusiastically than their counterparts.

Kim, Weaver and McCleary (1996), in examining the travel information search patterns of the seniors market, noted that the more 'active knowledge seeking travellers' were likely to utilise destinational information and that those senior travellers who were either visiting friends or relatives, or seeking relaxation were less likely to utilise such information. Snepenger, Meged, Snelling and Worrall (1990) suggest that visiting friends and relatives (at the destination), past experience visiting the destination, and novelty associated with the destination, have a large influence on the extent to which destinational information is sought, concluding that destination naive visitors (those visiting for the first time and not visiting friends or relatives) will place a greater reliance on such materials.

The concept behind the Great Green Way promotional campaign is very much in the ilk of that prescribed by Perdue (1986) with regard to 'travel-through regions' in Nebraska, with the primary aim being to get visitors travelling between the region's two major centres (Townsville and Cairns) off the highway to visit regional attractions and centres that might otherwise be passed by unnoticed. Gunn (1988a) states that the availability of different attractions within reasonable geographic proximity of each other strengthens a region's drawing power with the variety offered by the region enabling a wider spectrum of the travel party's needs to be satisfied. The challenge in such instances is for tourism stakeholders to market the region in a cooperative fashion, which recognises the complimentary strengths of the region's diversity, ahead of individual interests.

Cooperative marketing campaigns, such as that undertaken by the Great Green Way Management Committee, are advocated by Richardson and Cohen (1993) on the grounds that they create regions that are more able to develop a 'unique selling proposition' which is easily identified and applied in the mind of the prospective tourist. Richardson and Cohen (1993) argue that regional marketing should be based on cooperative efforts between adjoining locations, which share a commonality in terms of geographic and/or cultural features, as opposed to regions specified in terms of pre-defined political boundaries. Such a multi-destinational approach to promoting tourism creates an understanding of the linkages within a region, which in turn, better facilitates an effective marketing campaign (Lue et al. 1993). The Great Green Way promotional campaign has involved cooperative marketing at both the local and regional tourism authority levels.

Contrasting views exist in the literature as to the extent to which brochures influence travel decisions, with the predominant view being that in the majority of instances brochures play more of a secondary or informing role in tourists' decision making processes to 'word of mouth' advice received from friends and relatives and/or travel consultants (Wicks and Schuett (1993), Getz and Sailor (1993), Burke and Gitelson (1990), Ashworth and Goodall 1988, Gitelson and Crompton 1983). However, promotional brochures do increase awareness (Baas, Manfredo, Lee and Allen's (1989).

Factors found to influence the extent to which destination specific material is used by and/or influences potential visitors travel decisions include; the traveller's past experience with a given destination in the form of previous visits to that site (or others perceived as similar), with past experience resulting in a reduction in the use/influence of destination specific materials relating to that site (Etzel and Wahlers 1985; Zhou 1997); the individual's level of travel experience in general, with those individuals having made more trips overall, being more likely to utilise destination specific material (Etzel and Wahlers 1985); and the perceived usefulness of the brochure in question, with positive evaluation by the potential visitor resulting in a greater likelihood of visitation to the site in question (Zhou 1997).

Given the inconsistency in research findings relating to brochure influence and usage, it is important to determine whether the Great Green Way brochure played a role in the destination visit and if it did whether that role was as a determinant of the visit or as a source of supporting information (Burke and Gitelson 1990).

7.3 Methodology

Because we had identified measures of success it was important to be able to distinguish if a change has occurred as a result of the brochure. In light of Fesenmaier's (1994) comments that the majority of self drive travellers indulge in high levels of information search once en route, and Gitelson and Crompton's (1983) remarks regarding the importance that brochures be made available in the most appropriate location and time periods within the travellers trip planning horizon, it would seem that many prospects are likely to enter the Great Green Way region oblivious to the many opportunities that it presents. Hence an indication of awareness was a starting point for assessing the success of the promotional activity. An analysis of the increases in the measures reported by those who are unaware of the Great Green Way will help determine the success of this promotional program.

This situation would seem to demand that any analysis of the brochure's impact be addressed according to three main antecedents:

1. awareness of the Great Green Way as disclosed by participants;
2. increased visitation to attractions as a result of increased awareness from the brochure as reported by participants; and
3. increased overnight stays as a result of motivation to undertake activities mentioned in the brochure as reported by participants.

As a consequence of these antecedents being highlighted, a self administered questionnaire was developed and administered to 603 self drive tourists during a three month period extending from the 24th of March to the 23rd of June 1998. Potential participants in the visitor survey were approached using a convenience sampling method based around visitation to information centres. Respondents were asked to indicate whether or not they had been aware of the Great Green Way as a region prior to their visiting an information centre, what changes to their travel patterns had arisen in both attraction visitation and also in terms of extra nights spent in the region.

7.4 Results

The results revealed that only 24.4% of respondents were aware of the Great Green Way prior to their participation in the study. A lower than expected proportion of intrastate visitors were aware of the Great Green Way (39.5%) whilst a higher than expected proportion of interstate visitors were aware of the Great Green Way (19%). Interestingly, 85.8% of respondents to the visitor survey indicated that using the brochure had resulted in them visiting additional locations/attractions, with an average of 4.3 additional sites being visited by those who were influenced. Of those reporting having visited additional sites, 51.2% had in turn reported spending an average of 3.1 extra nights in the region.

Respondents who were predominantly on a touring style holiday (91.5%) indicated that they were more likely to visit places as a direct result of using the Great Green Way brochure than respondents who stated a specific destination (78.8%).

Short-term travellers indicated that the brochure had less of a direct result of on increased visitation to attractions (77.5%) than long-term travellers (96.7%). Not surprisingly, a lower than expected proportion of short term travellers indicated spending extra nights in the region as a direct result of using the Great Green Way brochure (32.9%) compared to medium and long term holiday makers (59.0% and 63.8% respectively).

Amongst the 85.8% of respondents who indicated visiting places within the Great Green Way region as a direct result of using the brochure, the resultant mean number of additional locations visited within the region was 4.3 with a median value of 3.0. The most commonly noted number of additional locations visited as a result of the brochures use was one (19.6% of responses) and the maximum number recorded was twenty-three. Of these respondents, 44% had had no original plans with respect to visiting locations in the region, and 51.2% indicated that such visits had resulted in extra nights being spent in the region.

The average number of extra locations visited as a direct result of using the brochure, among those respondents indicating the brochure had influenced their trip decisions was 4.3, confirming the strong and highly beneficial influence of the brochure in persuading visitors to spend additional time in the region. Intrastate visitors were likely to visit a significantly higher number of additional places than were international visitors, possibly due to international visitors pre planning their trip through the region to a greater extent and/or international visitors being on more restrictive time budgets.

These results indicate that the Great Green Way brochure has been successful in influencing visitors to the region to visit additional attractions/locations and as a consequence, in many instances, spend extra nights in the region. In addition to playing a vital role in influencing visitors to the region to visit additional attractions/locations in the region the brochure also fulfilled an important role as a useful source of supplementary information for those visiting sites, which formed part of their original trip plans. Among the 59.3% of respondents indicating that they had visited sites as part of their original trip plans 87.6% indicated that these visits were a direct result of the brochure.

7.5 Conclusion

This cooperative promotional campaign aimed to stimulate the awareness of a ‘through traveller’ (Lue et al. 1993) to an inter-connected set of attractions in the Great Green Way. The strategic aim being to create a desire in travellers to visit the attractions in the area. Undertaking this strategy has clearly increased visitation to the region’s attractions and has resulted also in increased usage of local accommodation. Such an approach bases its strengths on the cumulative drawing power of a complementary set of attractions (Wall 1983). The respondents to this study demonstrated a positive response to being made aware of the diversity of tourism opportunities available in the region. While it is not possible to suggest that equity exists in terms of partner contributions and received benefits, it is clear that cooperative marketing changes the strategic possibilities of operators, and therefore regions. As partners recognise that their former competitors are in fact seen as ‘complementary and agglomerative’ by the prospective tourist, the greater the possibilities of achieving better overall results.

Cooperative marketing ventures between operators and regional tourism authorities enable economies of scale through the sharing of campaign expenses; but more importantly, they reduce the amount of advertising clutter that results from an individualistic and competitive approach to regional development through tourism. Although this chapter has utilised the brochure as an example of the possibilities for cooperative approaches that can demonstrate measurable outcomes. It should be noted that the cooperative marketing approach taken in the Great Green Way drive route is only one component in a comprehensive marketing strategy.

Chapter 8

The Problem of Bypassed Townships

Ian Kelly and Mike Spark

8.1 Introduction

Geographical factors contribute strongly to the presence of tourism as a leisure activity and to the success or otherwise of tourism-related commercial operations. Among the geographic concepts useful in the analysis of drive tourism are spatial interaction, the friction of distance, the gravity model and accessibility.

At a broad level, the flow of leisure travellers from generating to destination regions may be explained in terms of spatial interaction, defined as purposeful movement from one location to another. Spatial interaction occurs only where there is *complementarity*, the existence in one location of demand that can be met by a supply in another location. Furthermore, this supply-demand relationship can be implemented only if there is *transferability*, some means of bringing supply and demand together, and absence of an *intervening opportunity* (an alternative source of supply which can meet the demand at less cost).

Thus, a demand for warmer weather among Melbourne residents stimulates temporary migration to tropical Cairns, a movement made possible by transport facilities. However, for some travellers this Melbourne-Cairns interaction will not take place if their needs can be met at less cost by visiting the Gold Coast, a closer destination, or even Bali, which, despite the greater distance involved, may be seen to offer better value.

In fact, distance is another major geographic factor. Records of spatial interaction show a negative correlation between frequency and distance; that is, the greater the distance between locations, the less frequent the movement between them, explained by the increase in cost, time and effort involved in overcoming the ‘friction of distance’. For many potential travellers, transferability is denied because of an inability to meet the costs of transport, and maps of tourist flows demonstrate that most leisure trips are conducted relatively close to home (Pearce 1995).

However, the Gravity Model, based on Newton’s gravity equation, introduces a complexity to this explanation of human activity flow patterns. It notes that interaction between two locations is positively related to their mass (commonly expressed as population) and negatively related to the distance between them. In a tourism context, the model suggests that interaction is likely to be greatest between locations where population is large and the provision of visitor facilities most highly developed. Thus, in Australia, the heaviest tourist traffic is between the metropolitan centres, although this circumstance disguises the extent to which these are gateways to other destination areas.

The dominance of the metropolitan centres stems from the advantages they possess with respect to accessibility. Historically, intensity of human activity and innovativeness have been greatest in locations where site and situation attributes have encouraged a convergence of routeways, bringing about a sharing of knowledge among people with differing experiences, and accelerated economic development (Friedmann 1975). The converse, of course, is a relative lack of development in locations lacking accessibility.

This is a problem that has been faced by a number of townships, in Australia and elsewhere, whose accessibility to motor vehicle traffic has been reduced by highway redevelopment.

8.2 Background

A number of reports have indicated that Australia's rural population has declined in recent times, with some areas experiencing a loss of up to 40 per cent over the last two decades. Contributory factors, matched to varying extents in other industrialised countries (Page and Getz 1997), include reduced employment in agriculture and the attraction of educational, social and other facilities available in the metropolitan centres.

Loss of population leads to reduced demand for the services provided in rural villages and townships. The situation is worsened by improvements in transport technology and highway reconstruction aimed at reducing travel time between larger centres by bypassing smaller centres, but also making it easier for rural residents to access larger centres for central place functions such as banking and retail purchases. Rationalisation, based on pursuit of scale economies, has been reflected in withdrawal of such services from rural centres, contributing further to the cycle of population decline.

Being bypassed can have dramatic effects on townships, many of which depended at least to some extent on the business generated by accessibility to highway traffic. A Bureau of Transport and Communications Economics report (1994) noted that while some residents appreciate the increased safety and quietness associated with traffic diversion, those who depend on traffic-serving businesses suffer loss of their livelihood.

It is claimed in the report that bypass economic impacts are generally more adverse for small townships. However, the study of two New South Wales bypassed towns, Mittagong and Berrima, indicated the more recently bypassed centre, Mittagong (population about 4200), appeared to be experiencing at least short-term decline in business activity, while Berrima (population about 650), noted for its well-preserved colonial buildings, had enhanced its tourism appeal, with a consequent shift in business activity from retailing to accommodation.

Deloraine, in North-West Tasmania, was bypassed in 1988. A Meander Valley Council officer claimed that the town had become more prosperous, and attributed its successful adaptation to its very active community organisations; carefully nurtured links with local art, craft and food producers; promotion of its function as a gateway to nearby attractions; appropriate highway signposting; and the development of a large artistic exhibit as a key town attraction.

These observations appeared to constitute evidence that townships incurring highway bypass may be cushioned to some extent by the presence of resources around which the township could be developed as a tourist destination.

8.3 The Investigation

Geographical studies suggest that successful adaptation to bypassing relates to survival as a central place; that is, a location to which people from the surrounding district travel to purchase household goods and personal services and to socialise (Berry 1967). Significance as a central place may be assessed by identifying the number of central place functional outlets, establishments where such goods and services are made available to members of the public. In general, they include retail shops, personal and professional services, and meeting places.

A field survey was conducted, listing the functional outlets in 15 small townships (population under 2500) bypassed as the result of highway redirection. They included four townships bypassed by the Bass Highway in North-West Tasmania (Hadspen, Carrick, Exton and Deloraine), five by the Midland Highway in Tasmania (Evandale, Ross, Oatlands, Tunbridge and Kempton), and six by the Dukes and Western Highways connecting Melbourne and Adelaide (Hahndorf, Tailem Bend, Bordertown, Dimboola, Keith and Ballan). The location of each township in relation to larger centres is shown in Figures 10 and 11.

As noted, central place retailing caters for general household requirements. Among the townships surveyed, the most common outlet type in this category is clothing (new) and there is substantial representation of supermarkets and grocery stores; meat, fish and poultry; and hardware and machinery. Personal and professional services are most strongly represented by hairdressing and beauty treatments, public houses and property agents. Central places also contribute to the social needs of communities by providing meeting locations, and almost all the townships surveyed contained one or more meeting places (apart from public houses) in the form of clubs and/or churches.

Figure 10: The Bass and Midland Highways (Tasmania)

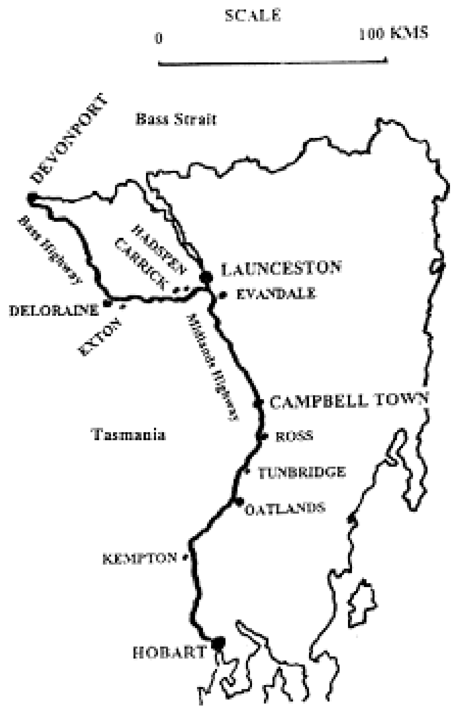


Figure 11: The Dukes Highway (South Australia) and Western Highway (Victoria)

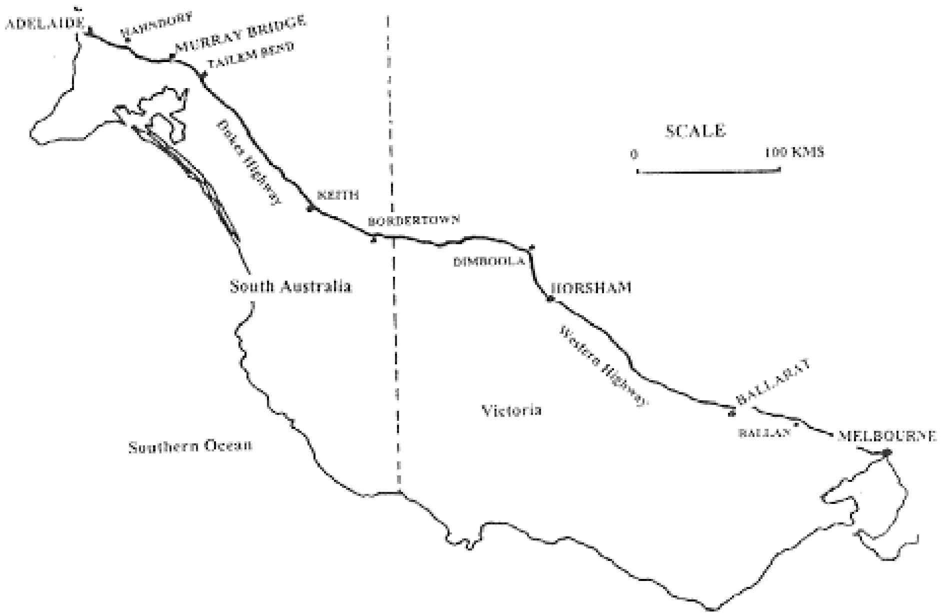


Table 16: Central Place Function Outlets

Locality	Pop. (1996)	Retail outlets	Service outlets	Meeting places	Total
Bordertown	2337	33	18	2	53
Deloraine	2168	36	17	2	55
Hadspen	1730	0	0	1	1
Hahndorf	1727	28	14	3	45
Dimboola	1557	23	7	0	30
Tailem Bend	1488	12	4	1	17
Ballan	1414	16	7	2	25
Keith	1089	26	14	2	42
Evandale	1033	2	2	4	8
Oatlands	539	19	11	0	30
Carrick	331	1	1	3	5
Kempton	327	1	1	3	5
Ross	275	5	1	4	10
Tunbridge	–	0	0	1	1
Exton	–	1	0	1	2
Total	**16015**	**203**	**97**	**29**	**329**

Table 16 shows the distribution, in broad categories, of central place functional outlets in the 15 townships. A strong presence of these retail, service and meeting provisions indicates that a township is maintaining its central place role, despite the improvements in travel time to alternative centres. The information in Table 8.1 suggests a positive correlation between township population and the total number of central place outlets (Pearsons Product Moment Correlation Coefficient, r = 0.7). The anomalous position of Hadspen may be explained by its proximity to the city of Launceston to which most of the population can easily commute for employment and shopping. It is also too close to Launceston to constitute a rest stop for travellers using the Midland Highway. Smaller settlements such as Oatlands and Keith continue to service prosperous farming areas, and probably benefit from their relative remoteness.

The extent to which a township is dependent on, or is successfully catering for visitors (i.e., people not residing in the immediately surrounding district) may be indicated by provisions for dining out (restaurants, cafes, takeaways and bakeries), sales outlets for tourist-oriented items (art and craft goods, antiques, gifts and souvenirs), and accommodation houses (hotels, motels, guesthouses and bed and breakfast establishments).

Table 17: Visitor-oriented Function Outlets

Locality	Pop. (1996)	Dining Out	Tourist shops	Accom.	Total
Bordertown	2337	8	1	2	11
Deloraine	2168	11	5	5	21
Hadspen	1730	0	0	0	0
Hahndorf	1727	37	44	6	87
Dimboola	1557	4	8	2	14
Tailem Bend	1488	6	0	1	7
Ballan	1414	3	1	2	6
Keith	1089	9	7	1	17
Evandale	1033	8	6	3	17
Oatlands	539	7	16	4	27
Carrick	331	3	2	0	5
Kempton	327	2	5	2	9
Ross	275	7	11	7	25
Tunbridge	–	1	2	1	4
Exton	–	0	1	0	1
Total	**16015**	**106**	**109**	**36**	**251**

Table 17 shows the distribution of these functions, and it is clear that there is little correlation with population size (r = 0.2). Hahndorf is by far the largest provider of visitor services, but these are also of major importance in the smaller centres of Oatlands and Ross. It is noted that those three townships are also relatively better served with central place functions than other townships.

Table 18: Total Outlets (Location Quotients)

Locality	Pop. (1996)	Total outlets	Location Quotient
Bordertown	2337	64	0.66
Deloraine	2168	76	0.85
Hadspen	1730	1	0.01
Hahndorf	1727	132	1.85
Dimboola	1557	44	0.68
Tailem Bend	1488	24	0.39
Ballan	1414	31	0.53
Keith	1089	59	1.31
Evandale	1033	25	0.58
Oatlands	539	57	2.56
Carrick	331	10	0.73
Kempton	327	14	1.03
Ross	275	35	3.08

Locality	Pop. (1996)	Total outlets	Location Quotient
Tunbridge	–	5	–
Exton	–	3	–
Total	**16015**	**580**	

Table 18 shows the distribution of combined central place and visitor provisions, and uses a location quotient to demonstrate the level of provision in relation to population. The location quotient is a measure of the extent to which an attribute is present in a location in comparison with a set of locations of which it is a part. In the present context, it has been calculated as follows:

- LQ = (ls/lp)/(TS/TP), where
- ls = the number of services in a locality
- lp = the locality population
- TS = the total number of services in the surveyed localities
- TP = the total population of the surveyed localities (excluding Tunbridge and Exton).

A Location Quotient of 1 indicates a presence of services matching the average for that population size. Above or below average presence is indicated by values greater or less than 1 respectively. It should be noted that the number of outlets provided exceeds the number of establishments, as some provisions are combined (e.g. groceries and take-away food).

The locality maintaining the largest number of services for its population is Ross, followed by Oatlands, Hahndorf , Keith and Kempton, all with LQs greater than 1. The dearth of services in Hadspen is again highlighted.

8.4 Discussion

The above findings, and observations conducted in the field, suggest that factors influencing the survival and prosperity of the surveyed bypassed townships include:

- *Population level*. There appears to be a threshold population below which revival after bypass is unachievable. In the sample, the two smallest townships were marked by numerous vacancies and ‘For Sale’ signs and are no longer recognised by the Australian Bureau of Statistics as named localities for census purposes. However, there is no general correlation between the total number of functional outlets available and the population of a township (r = –0.05).
- *Proximity to a larger urban centre*. In some instances townships have attracted or retained a resident population of commuters sufficient to support the continuance of retail outlets and services (e.g. Evandale). However, where the township residents choose to shop in the centre where they are employed, the township may retain very few central place functions (e.g. Hadspen), and constitute no more than a dormitory suburb.
- *The prosperity of the surrounding region*. Townships which have

traditionally existed to service the farming community of the area appear to have maintained that function where farming continues to thrive (e.g. Oatlands). Indeed, it was indicated that following the bypass, the township of Oatlands became more attractive to nearby rural residents as a place in which to conduct the weekly shopping.

- *Continued service to travellers*. A few settlements maintain their links to the travelling public by establishing comfort stop arrangements with scheduled coach services (e.g. Oatlands, Tasmania; Bordertown, South Australia). There is a spillover effect in that the service becomes known to and used by car travellers.
- *The presence of tourism resources*. Among the townships surveyed, successful adaptation to highway bypassing appears to relate to factors which include the presence of colonial constructions (houses, churches, bridges, etc) (e.g. Ross and Evandale) or a distinctive ethnic character (e.g. Hahndorf). Some settlements have built on their gateway role, servicing travellers to and from nearby attractions (e.g. Deloraine and Oatlands).

It is submitted that, while there are a number of factors contributing to post-bypass maintenance of township economies, there is strong evidence to support the contention that, with respect to the sample examined, tourism has played an important part, with the small Tasmanian township of Ross as the clearest illustrative example. The following is therefore a case study identifying the considerations involved and processes implemented in the adoption by Ross residents of a tourism strategy.

8.5 Adoption and Implementation of a Tourism Strategy

Rural tourism is generally distinguished by a wide dispersal of attractions and activity settings. However, within broad rural environments, villages and small townships (such as those examined in this investigation) constitute minor settlement nuclei whose economies may be enhanced by an ability to attract visitors. It is also true that, where there are established settlements, tourism is seen as placing few demands on public resources, requiring only access provisions, roadside and site markers, cleanup services and marketing. It is expected that more costly investments – accommodation, restaurants and entertainment facilities – will be provided by the private sector (Frederick 1993).

The Tasmanian township of Ross was bypassed by the Midland Highway in 1972. The decision by residents to adopt a tourism strategy was preceded by a community consultation process guided by the principles of shared decision-making and collaboration (more recently highlighted by Williams et al. 1998 and Marcouiller 1997, respectively). These involve achieving consensus through a negotiation process which includes all stakeholders and recognises the interdependence among them.

Support for the tourism proposal was followed by the appointment of a management committee charged with developing a plan based on a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the township as a visitor attraction. This included an inventory of the natural, built and cultural resources (present or potential) to which visitors could be drawn along with the identification of additional facilities (e.g. accommodation, public toilets, car and coach parking, picnic areas) required to meet the needs of visitors.

The management committee continues to recognise the role of presentation and the development of additional attractions in the success of the township. With a large number of appropriate structures, Ross offers a colonial heritage experience, and as far as possible everything visible is consistent with that theme. Old buildings are preserved and new ones designed to match them. Township signs (no longer intended to catch the eye of motorists on the highway) are subdued, and make use of colours and print styles of the 19th century. The main street is kept spotless, and even the householders contribute with the quality of their garden design and maintenance. A number of dishes offered in the restaurants reflect the colonial theme.

The visitor experience is further enhanced by interpretation – an educational process contributing to understanding and appreciation of the significance and unique character of the township. This is in the form of brochures, notice boards, plaques and tour guide commentaries.

It is also recognised that visitor activities must be in keeping with the atmosphere created. These include carriage rides, guided walks and museum, historic site, workshop and gallery visits. The Tasmanian Wool Centre, commemorating the major product of the surrounding area, was established as a bicentennial project in 1988. Tourism sidelines (Kelly and Dixon 1991) by local food and/or beverage producers are encouraged. Classes are organised by local artists and craftspeople and workshop interviews arranged.

The popularity of shopping has not been ignored. Vehicular traffic movement is controlled, and easy walking surfaces provided. Large, shady trees encourage people to adopt a leisurely pace as they move from one sightseeing spot to another, past the various shops. Merchandise items such as souvenirs are generally consistent with the chosen theme, and many are locally crafted.

The provision of adequate quality accommodation not only boosts the employment base, but is necessary for retention of visitors overnight or longer. Unlike highway or city accommodation, bypassed township accommodation cannot attract guests merely by virtue of convenient location, and must develop specialist appeal and be consistent with the township theme in architectural style and furnishings. In townships such as Ross, it may take the form of colonial bed and breakfast establishments, guesthouses, country inns, serviced cottages or home hosting – usually small, owner-operated businesses distinguished by a high level of personal service and host-guest interaction. Given the relative remoteness and small size of the townships, it has been necessary to arrange for in-house training during off-peak trading hours to ensure appropriate quality in the delivery of hospitality services.

8.6 Establishing the Township Presence

Bypassed townships remain advantaged to the extent that nearby highways still provide quick and easy access for motor-vehicle travellers. However, while appropriate signage is important in drawing travellers from the highway, there is a requirement to adopt a strategic marketing approach to ensure longer-term township viability and progress.

For settlements like Ross, there is the ability to offer a number of benefits to the drive tourism market, likely to include travellers stopping only for food and/or fuel; short-term visitors undertaking casual sightseeing; visitors drawn by specific events, attractions or activities; day-trippers (tour or family groups) incorporating the township in a larger tour; and short-break visitors staying overnight or at weekends in local accommodation.

The ability of a small township to compete as a destination may depend on the promotion of a unique or outstanding feature, natural or cultural, but more commonly there is reliance on a combination of elements (WREP 1998). Getz and Page (1997) note that the tourism appeal of rural areas relates to:

- remoteness, isolation, solitude, peace and quiet;
- undisturbed nature and aesthetically pleasing landscapes;
- access to ‘authentic’ cultures (ethnic, traditional and native);
- heritage sites and buildings;
- a perception of safety, hospitality, and relative exclusivity (not mass tourism);
- enhanced lifestyle opportunities (including foods and beverages); and
- adventure experiences.

‘Nostalgia tourism’ is a term coined to encompass the growing interest in exploring the rural or small town lifestyle as a means of escape from the pressures of modern life (Creighton 1997). Many bypassed townships have historical sites and heritage assets which are becoming more highly valued as our relatively young nation matures, and opportunities may be taken to promote these, perhaps through festivals celebrating a settlement’s culture or history.

The provision of a caravan park is necessary to tap into a growing market, the so-called ‘gray nomads’, freed by retirement from the restrictions of work schedules, and able therefore to counter the fluctuations in weekly and seasonal visitation. Equipped with their own cooking facilities and transportation, these caravan travellers tend to patronise local outlets for their food supplies and use the park as a base from which to visit a range of attractions in the district.

Another potential market is the conference sector. Substantial financial benefits may be derived from hosting even small meetings, and these may be enhanced by the establishment of a good reputation with business organisations and return visits, perhaps with family, by participants who enjoyed their initial experience of the place.

More generally, however, there should be an emphasis on relationship marketing, with one approach directed to turning visitors into advocates. For example, return visits may be encouraged by the establishment of ‘villager clubs’ (Creighton 1997) involving newsletters to visitors who have recorded their contact details (with comments) in a village register. Advocacy can also be pursued through partnership arrangements with supplier organisations such as attraction operators and coach and car rental companies, whereby visitors may be offered discounted packages which cover admission, transport and accommodation.

It should be noted that the benefits of the Internet are available to bypassed (and other rural) townships, contributing to a situation in which effective, wide-reaching promotion is no longer exclusive to the larger organisations with substantial financial resources. The Internet will lead to more ‘place wars’ (Kotler, Haider & Rein 1993) by enhancing market reach, but it also increases the capacity for collaboration among service and product providers in the township and neighbouring areas and with regional, state and national organisations.

As noted, the major tourism assets of bypassed townships are typically of a physical, cultural or heritage nature, often belonging to the community at large but supplemented by the assets and efforts of private operators. However intangible assets such as community values, hospitality and lifestyle are equally important components of the package to be promoted to the world at large, and collaboration by all involved in the community is essential to the success of township marketing or re-imaging projects. Internal tensions communicated to visitors may cause them to look for alternative destinations offering an experience more consistent with their expectations.

Even competition among townships should be tempered by an appreciation of the value of collaboration which allows the sharing of regional and local promotional and administration expenses, and greater reach through the combined efforts. For example, Ross is joined with other townships in promotions of Tasmania’s Heritage Highway, directed at travellers with an interest in Australia’s colonial background.

In summary, it is submitted that, for bypassed townships, success in targeting the drive tourism market will depend on the following:

- Retention of a relatively easy link to a major highway;
- The presence or creation of attributes with the potential to be tourism resources;
- A consultation process which ensures that all stakeholder views are taken into account and provides a channel for community support;
- A representative management committee to fill a leadership role, seek and provide informed advice, develop an implementation plan and oversee its continuing operation;
- Measures to ensure visitor safety and comfort;
- Accommodation provisions which provide visitors with a ‘taste’ of the township traditions;
- Maintenance of consistency and ‘a sense of place’ in the presentation of the township’s tangible and intangible facilities and attractions;
- Encouragement of visitor interest through appropriate interpretation; and
- Heightened visibility through highway signposting, a presence on the Internet and collaborative promotion arrangements with other townships and organisations.

8.7 Cautionary Considerations

The authors recognise that bypassing is only one of the factors contributing to rural poverty and a decline in services available. There are areas where high levels of unemployment and declining purchasing power have resulted from downsizing in or closure of extractive, power-generation and processing industries. While such localities may benefit from the adoption of a tourism strategy as proposed in this paper, the focus here has been on townships retaining relatively easy access to a major highway. The strategy may, therefore, be effective in townships not bypassed but placed in proximity to highways as the result of new construction or redirection programs. There may also be parallels with settlements, such as Victoria's Williamstown, whose significance as a port declined with the growth of Port Melbourne and a reduction in the demand for sea transport, but which is now a thriving tourist destination.

It is also recognised that a necessary element of the proposed strategy – funding – has been largely ignored. On the positive side, a tourism strategy as proposed here is likely to be encouraged by Australian governments, from local to national, as having the potential to contribute to the objectives of decentralisation, provision of rural employment and heritage conservation. The planning process should, therefore, incorporate efforts to attract government (and other) funding, especially in the early implementation stages.

It must be noted that not all bypassed or otherwise depressed townships will have the colonial buildings of Ross or the ethnic character of Hahndorf with which to attract visitors, and may be faced with the problem of creating tourism resources. However, where they are present, a major concern relates to the sustainability of the assets treasured by the community and highly regarded by the traveller, and the extent to which they may be negatively impacted by the success of the marketing efforts. It is essential that township promotion plans be continuously open to review processes which incorporate clear identification of the constraints within which the community must contain its aspirations.

An additional concern relates to the manageability of the proposed approach. It is likely that the smaller the township, the more easily the strategy can be implemented. While this may offer hope to townships so small they may not otherwise recover from bypassing, larger centres may find it necessary to adopt an approach which involves identification of one or more precincts suitable for presentation as unified attractions.

It is emphasised that the hypothesis in this paper is based largely on observation of a limited number of bypassed townships, and the proposals largely on the experience of one successful township response to bypassing. However, given the seriousness of problems relating to the provision of services in rural areas, and the increasing frequency with which bypasses occur, it is suggested that a utilitarian follow-up should involve further consultation and the development of a handbook providing detailed directions for each stage in the planning, implementation and maintenance processes involved in the adoption of a township tourism strategy.

Chapter 9

Product Market Perspective of Self-drive Tourism

Noel Scott

9.1 Introduction

The chapters of this book on drive tourism reflect many of the problems and issues central to the study of tourism more generally. As a topic for research, the study of drive tourism is a very loosely defined, is not theoretically structured and lacks methodological rigour. A number of authors in this book refer to the lack of definition of drive tourism or perhaps the lack of consensus on what could constitute a definition. Dean Carson and Iain Waller, and Bruce Prideaux have introduced some of the available information on Drive Tourism from the Bureau of Tourism Research. Carson and Waller have also provided an information framework to help classify data.

In addition, drive tourism has been studied from many different perspectives such as management and business, marketing and economics. Economic perspectives on drive tourism include the value of scenic roads, (Walsh, Sanderson & McKean 1990), tourist expenditure and regional development (Roehl, Fesenmaier & Fesenmaier 1993). One of the major focuses for drive tourism research has been to explore the interaction between tourism and economic development (Greffe 1994). From a business perspective, there are studies on bus tour operators (Dean 1993), independent automobile touring (Lue, Crompton & Stewart 1996; Taplin & Qui 1997), the rental – fly/drive market (Oppermann 1995) and caravan parks (Bell & Crilley 2002) as well as issues such as tourism signage (Dornbusch & Kawczynska 1992). From a marketing perspective there are articles on traveller segmentation, (Stewart, Lue, Fesenmaier & Anderson 1990), promotional effectiveness (Hodgson 1993) and particular market segments such as the seniors market (Vincent & Santos 1990). Many of these approaches are found in this book.

On the other hand the theoretical diversity found in the literature is not linked to strong methodological development with only few methodological issues discussed (McCool 1991; Stewart, Anderson, Fesenmaier & Lue 1993) and these mainly related to techniques of survey data collection.

The definition of drive tourism adopted here follows the definition of tourism adopted by the WTO. This includes a distance criteria in that it involves travel outside the usual environment. For the purposes of statistical data collection, the Australian Bureau of Tourism Research (BTR) uses a measure of 40 kilometres to define the boundaries of the usual environment.

Thus, it is possible to define drive tourism as travel by car or bus more than 40 kilometres for tourist purposes. It may be subdivided into categories such as self-drive/own car or self-drive/rented car although no taxonomic structure has been accepted in the literature.

9.2 History of Drive Tourism

A useful starting point for any area of academic endeavour is to look at the history of the phenomena under study. This history can provide a context and understanding of the development of major institutions, illuminate critical events and people and provide of the past and current magnitude of the phenomena as well as some of the dynamics of change over time. It may also highlight important issues or problems for research.

The automobile has radically changed tourist habits this century. In the first decade of the 20th century, a small, wealthy elite in America enthusiastically embraced the automobile and paved the way for the larger market. The initial destination of these drive tourist 'innovators' was the romantic northeastern US scenery. Choice of this destination was influenced by contemporary paintings from the Hudson Valley School of artists (Hugill 1985). Cheaper automobiles allowed the mass market to follow the trend setting wealthy innovative tourists. In a similar fashion, (Butler 1985) has discussed how automobiles have dramatically altered the Scottish Highlands in the 1950s. The automobile allowed the 'masses' to visit places once the preserve of royalty and the elite.

However, the motivations for discovery, travel and imitation are nothing new. Many of the institutions and conventions associated with modern touring are documented in a history of Roman holidays (Feifer 1986). These include roadside inns, tourist maps and popular attractions. More recently, the history of the Grand Tour in Europe (Brodsky-Porges 1981; Towner 1985) documents a similar set of innovations such as travelogues and maps, the growth of an organised and standardised pattern of accommodation and the popularisation of certain destinations. The lure of touring and travel is both deeply ingrained and widespread in society.

9.3 Touring by Automobile

Automobiles made their presence felt in Australia in the early 1900s. Richardson (1999: 101) discusses the growth of the infrastructure of touring and notes that most motoring organisations formally established touring departments in the 1920s. In 1917, the Royal Automobile Association of South Australia and the Commercial Travellers Association agreed on a method to identify 'the best hotels at accommodate members in country towns'. In 1919, 'Pioneer Motor Coaches' offered an 8 day tour from Melbourne to Mt Kosciusko.

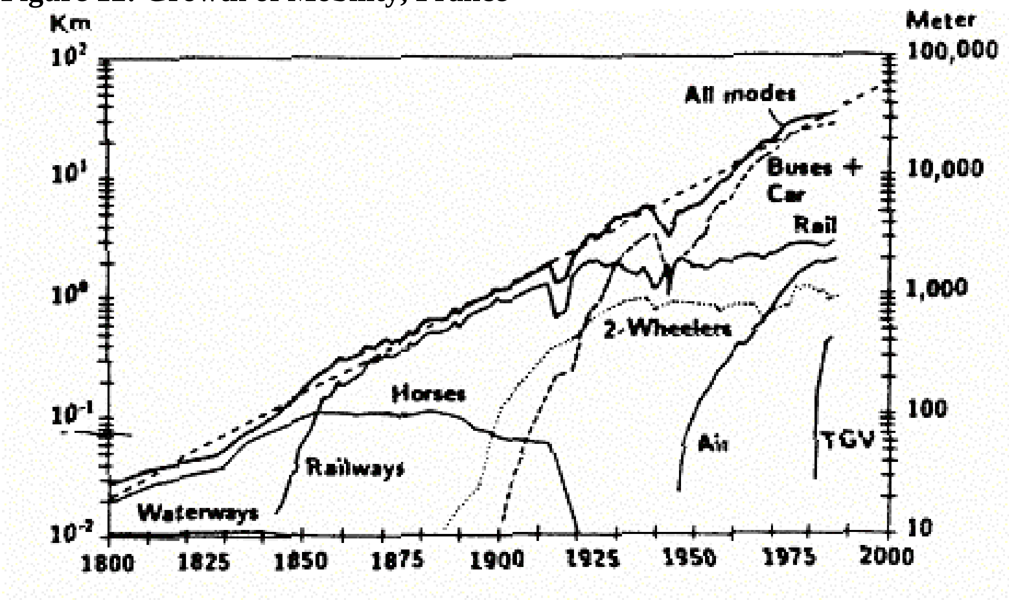
During this period the automobile gradually supplanted travel by horse as the preferred method of short travel while rail or sea remained popular for longer distance travel.

Motor coaches and cars underwrote development of tourist roads in New

Zealand such the Homer Tunnel in the late 1930s and more recently the Haast Pass highway in the early 1960s (Watson 1993:24). These were largely for sightseeing traffic. Automobiles also underwrote a big expansion in mountaineering and skiing, symbolised by the opening of The Chateau, Tongariro in 1929.

The post war expansion in Australia led car ownership to double to over a million between 1946 and 1952. This led to increasing pressure on roads and also underpinned the growth of resort areas along the Eastern Coast of Australia. In the 1960's, caravanning began to become popular and in 1961, coach companies began traveling to Ayers Rock. Car rentals became available in Australia before and during WWII. After the 1960s the introduction of air travel slowly eroded the predominance of rail and the automobile for longer trips. Bus travel was an early casualty. Most recently, the introduction of budget airlines has increased the pressure on the automobile for longer trips. The following diagram from Reggiani and Nijkamp (1994) provides an illustration of the substitution of modes of transport over time.

Figure 12: Growth of Mobility, France



Source: Reggiani & Nijkamp (1994)

The history of the drive market in Australia is part of a succession of different forms of transportation each with its particular advantages at the time of its invention. Each form increases in importance until overtaken by some more effective mix of methods of travel. From this historical perspective, automobile touring is one category of tourism in a similar way to touring by rail or ship may have been in the past. While these older categories still exist today, they are not the dominant category. Instead today, this dominant form of tourism is related to air travel and automobile travel together.

Each of these forms of travel was related to a network of interrelated institutions. During the early years of automobile motoring and touring a number of institutions were developed. These provided specialised functions required by the developing category of travel. Many of these we take for granted today but were innovations at the time. Automobile Associations (RACQ, RACV, etc.) were initially formed to provide mechanical support for motorists but soon developed other functions. These included provision of detailed maps, guides for accommodation and information about enroute attractions and services. Service stations were set up in towns around the country providing employment and new skill requirements. From a tourism point of view, specialist tour operators appeared early first with cars and then buses. Caravan parks began appearing and became the foundation for destinations such as the Gold Coast and other coastal resorts.

In the process, these organisations developed a network of relationships evidenced by the Motoring organisation guide books and touring arms. These interrelationships in turn influenced and guided the development of further innovations and the actions of the larger public.

However, the actions of those behind the wheel should not be ignored as part of the dynamics of the development of automobile touring in Australia. As automobile touring developed, the activities undertaken and places visited for holidays developed and changed because of the actions of individuals or small groups of people. The automobile provided the opportunity to undertake adventurous and novel experiences well away from the norms of the home environment. In the United States, those wealthy enough to own automobiles 'rediscovered' areas painted by the 'Hudson school' that they had previously been aware of but were unable to visit. These areas were well know and had associations of romance and status.

In Australia, one region initially visited included Mt Kosciusko and later when improving technology provide the means, Ayres Rock (now Uluru). These and other icons came, at the time, to represent the adventure and excitement of this new form of travel. Those who undertook these initial adventures have provided a legacy and roadmap for others to follow. These in turn have been passed on to latter generations and as a result there, today, the 'gray nomads', those older travelers on extended holidays driving around Australia or through the Outback are in part motivated by ideas and common 'representations' (in the sense used by (Moscovici 1984)) that have evolved since those early days.

One interesting conclusion from a historical review of the drive market is to note that many of the 'inventions' and organisations that we take for granted today are in fact historical creations that derive from specific historical situations and then have become embedded and stabilised. Thus the representations and ideas that we have today are crystallised from the actions of individuals in the past. In part the importance of history in tourism is due to the enduring nature of some aspects of the tourism product. In some ways this stability is illustrated by the work of Marles on repeat visitation to caravan parks. We still see and use today the hotels and caravan parks that were established many years ago. The nature of the tourism product is longer terms and less commercial.

It is therefore possible to interpret the history of automobile touring in Australia in terms of the interactions of the traveller with the suppliers of services both direct (tour operators) and indirect (Governments providing funding for roads). Both the automobile and associated organisations are affected by the actions of individual people using their cars and visa versa. In the next section I will develop these ideas further by providing a theoretical framework for the structure of automobile touring as a tourism market and the dynamics of this market over the longer term.

9.4 A Framework for Automobile Touring

It is normal in the field of tourism to understand the interaction of the tourism product, the traveler and the tourism operator in a destination as part of a tourism system (Leiper 1989). In the case of automobile touring, such a system would be characterised as only partly industrialised (Leiper 1990) since it involves many non-commercial transactions and activities (i.e. Driving the car is predominately a non-commercial activity). The application of systems theory to a particular part of reality involves the identification of a system boundary, the identification of system variables (or possibly subsystems) and definition of the relationship between them (Allen 1998).

The application of systems theory to tourism has predominantly involved the use of boundary conditions of a geographical nature. The specification of the variables or subsystems within the tourism system has been more controversial. For example, (Mill & Morrison 1985) focuses only on the destination and identifies five subsystems (attractions, accommodation, transport, hospitality and events). Alternatively, (McKercher 1999) identifies several subsystems and additionally specifies that the relationships between these is both nonlinear and involves feedback and interaction between them. This complex interaction of the subsystems over time leads to chaotic system dynamics over time.

In considering automobile touring in Australia, it is less obvious that a geographical system boundary is useful as the activity includes multiple destinations spread over much of the Australian continent. At the same time the phenomena of automobile touring involves a substantial economic component. Driving a car involve continual direct expenditure along with all the additional tourism services (accommodation, meals, entertainment and attractions, etc). In the case of automobile touring, the *product-market*, a concept from the economic and marketing literature is more useful than a geographical boundary as a means of structuring the overall system of automobile touring in Australia. Thus, as will be discussed below, automobile touring in Australia may be imagined as an overall system composed of a number of product markets. Thus the subsystems in such a conceptualisation are product-markets rather than simply attractions or accommodation as other authors have discussed. This retains the holistic nature of the overall systems approach and yet allows examination of the interaction of tourism elements (attractions, accommodation, forms of transport) at a lower level of amalgamation.

9.4.1 Product Markets Concept

The product-market is a theoretical concept central to economics and marketing and is based on several of the important assumptions that have been traditionally been associated with theorising in these areas. These are:

- Marketing is necessitated by a separation in society of consumers and producers;
- Marketing acts are the exchanges that take place between these two groups (Bagozzi 1979);
- The actions of individual consumers and producers, when aggregated, generate the forces of demand and supply; and
- The dynamic interplay between the forces of demand and supply is a primary characteristic of the marketplace as a whole (Dickson 1992).

Within this context, product-markets are the most intimate level of interaction between suppliers and consumers. Rosa, Porac, Spanjol and Saxon (1999) considers product-markets as the meeting grounds for buyers and sellers of goods. He defines a product-market as:

> …The bounded arenas in which prices and quantities for substitutable goods and services are negotiated by consumers and producers and are separated from other bounded arenas by gaps in demand between the product groupings.

Similarly, Day, Shocker and Srivastava (1979) defines a product-market as:

> The set of products judged to be substitutes, within those usage situations in which similar patterns of benefit are sought, and the customers for whom such usages are relevant.

The concept of a product-market therefore involves those products judged as substitutable by consumers within a particular usage situation. It also involves the producers of those goods.

9.5 Importance of Usage Situation

The concept of a product market is based on the view that the organising theme for a market is not products or people per se, but the benefits sought by those people from the products. These benefits provide the basis for the usage situations included by Day et al. (1979) in their definition. It is possible for the same product to be used to provide different benefits by different consumers. Thus the same hotel room could be used by a honeymoon couple to provide the setting for romance and intimacy or by a business person for fulfilment of the physiological needs of sleep and rest.

In the case of automobile touring, there are a number of usage situations or benefits that may be sought. These include benefits such as adventure and excitement, escape, discovery and learning derived from the experience within the car itself or alternatively benefits provided by the places visited in which case the car become a very secondary aspect of the product market, necessary but not sufficient to explain existence of the product market.

Thus automobile touring may be considered conceptually to be broken into at least two distinct product-markets consisting of those for whom it is the benefits of the travel itself that are important (along with all the services that support them) and those for whom it is the excitement of the places that can be visited that are important (along with that different mix of services that support them.

This is a conceptual analysis provided only to illustrate that it is benefits and usage situation, along with the product available that define the product-market. The actual structure of the automobile market must be derived from research and a number of methods are available in the literature to do this as discussed by Day et al. (1979) and other authors.

9.5.1 What Is the Product?

The concept of the product market fits well with the idea of tourism as a complex and essentially experiential tourism product involving some amalgam of products and services such as accommodation and attractions etc. (Smith 1994) (Gabbott & Hogg 1998; Murphy, Pritchard, & Smith 2000; Wahab, Crampon, & Rothfield 1976).

From this perspective, tourism product markets consist of a product system where consumers group a series of complementary products together (Ratneshwar, Shocker, Cotte, & Srivastava 1999). These complementary products are gathered from a range of suppliers meeting the tourist’s expectations. In this sense the tourism product involves a system of suppliers. The initial decision to undertake automobile touring involves a cascade of subsequent decisions, (Woodside & King 2001) some of which are related and some of which are independent but partially determined by previous decisions. Therefore the actual sum of all individual holiday components purchased constitutes the holistic tourism product.

9.5.2 Gaps between Product-markets

The concept of a product-market involves, as suggested by the definition, both substitutability between products within the product market and gaps in demand between product-markets. These gaps in demand represent a structure imposed by the actions of suppliers and the knowledge systems of the customers (Bourgeois, Haines & Sommers 1987; Rosa et al. 1999). Thus it may not be economically feasible for suppliers to meet all the different requirements of customers. Instead they may only meet the demand where it is densest. In this case, customers either leave the market or accept a product that meets their needs imperfectly. In tourism, the cost of hotels and apartments, of roads and staff may mean that some automobile travellers are only imperfectly provided for.

This view of automobile touring in particular and tourism in general as a series of negotiated product markets, with gaps in demand is in contrast to the ideas associated with other forms of tourism, notably ecotourism and resorts. A number of authors in tourism have discussed tourism in terms of a spectrum (Boyd & Butler 1996; Butler & Waldbrook 1991; Orams 1996; Prideaux 2000a). These authors present demand for ecotourism for example along a continuum without discussing whether there is equal demand on each segment. The concept of a product-market instead suggests that on any such spectrum representing the variety of benefits sought, there will be gaps.

9.5.3 Fuzzy Boundaries

It should be remembered however that a product market is only an attempt to provide a conceptual tool for examining the exchanges that take place between suppliers and consumers. They have no physical reality but are of use as management tools. Considerable attention has been given to defining product market structures and the boundaries between product categories from a cognitive (Rosa et al. 1999) and organisational perspective. Bauer and Herrmann (1995) suggests that both consumer and supplier need to be involved in defining product-markets and their boundaries. In the final instance however, these boundaries are indistinct and changeable over time. Thus over the history of the automobile market, as new innovations were introduced, (such as better engines, caravans, four wheel drive and off road vehicles, new roads), the initial automobile touring market changed and evolved. Today, it is a complex series of partially overlapping product markets each with indistinct or fuzzy boundaries.

9.5.4 Relationship to Special Interest Tourism

Previous authors in this book have examined automobile touring from the viewpoint of special interest tourism. Special interest tourism was examined in detail first by Weiler and Hall (1992) and involves identification of 'types' of tourism that have some 'particular interest'. It involves 'the realisation that transport and accommodation considerations alone do not provide the tourism product' (Hall & Weiler 1992). In this sense the idea of special interest tourism is similar to the concept of a tourism product-market especially as the definition of a particular form of Special Interest Tourism often involves the motivation of the traveller (i.e. REAL travel).

In addition, the concept of special interest tourism as discussed by Hall and Weiler does involve the idea of change over time, similar to the discussion of product market dynamics above. These authors draw attention to the changes induced in tourism and the creation of new product-markets due to changes in the wider society especially those caused by increased environmental awareness and agitation.

9.6 Product-market Dynamics

The concept of product market as the interaction of travellers and operators and the complexity of the nature of the tourism product which they jointly define suggests that even within a product market there may be no two products that are exactly the same, no two automobile tours are the same but only similar to one another. However, over time the cumulative actions of many such travellers may be considered to define as aggregate demand curve with both some average pattern of experiences around which there is considerable variation. Change in the product market can therefore be thought of as movement in the shape or average of this demand curve.

On this basis we can consider classifying the changes in product markets into a number of areas. Incremental change occurs when the shape of the demand frequency curve varies only slightly over time while radical change occurs when a whole new curve is created. Mutational change may occur when behaviour changes and as a result the curve splits into two related curves.

9.7 Management Uses of Product Markets

Apart from conceptual clarification, product markets are useful for a number of practical management tasks. In fact, careful market demarcation is an essential element of practically all strategic and tactical marketing decisions. A product market analysis can provide a detailed knowledge of the competitive relationships within a markets, and is particularly useful for the purposes of product policy, such as identifying unsatisfied demand, developing new products and modifying or eliminating existing products (Day et al. 1979; Srivastava, Leone & Shocker 1981). Moreover, they are useful in examining whether or not a company should enter into new or existing markets; how brand, product-type and variant-choice decisions are made by the travellers and – as a result of this – provide direction in the nature of the marketing mix.

Product markets can help a particular organisation ‘chalk out’ the boundaries of the firm’s (or strategic business unit’s) business (Ratneshwar et al. 1999). This allows a firm to better articulate its mission or purpose – its self concept of what its about and what it can or should be in the future (Ansoff 1965; Drucker 1974). Additionally, product markets can help significantly in simplifying the process of environment scanning undertaken by businesses in their planning processes (Ratneshwar et al. 1999). In particular, it is clear in tourism and fundamental to the concept of a product market that events in the business environment have varying impacts on different product markets. This is especially important in longer term planning and scenario generation exercises as well as understanding the impact of events or shocks on particular product markets. Mark Olsen and Ros Derrett provide two detailed case studies of the drive market category and some of the product markets within it. It reflects that more and more tourism is being seen as a number of related ‘product’ categories rather than a homogeneous market. The chapters by Kathy Marles and Ian Kelly and Mike Spark provide some detailed examination of some of the real product market issues of crucial interest to operators. Again these later two papers illustrate the detailed and complex nature of drive tourism.

9.8 Implications

The major implication of the use of the product market concept to conceptualise automobile touring is that we must consider automobile touring as a series of product markets each with its own dynamics and the boundaries of which should be explored through research. Additionally, these product market boundaries are constantly changing both through the actions of operators, travelers and the effect of innovations and change in the wider business environment.

Examples are numerous:

- Over the past ten years, there has been considerable growth in the use of self contained cabins in caravan parks as a means of adapting to changing consumer demand for higher quality accommodation.

- The growth of self drive international travelers to Outback areas of Australia is forcing examination of issues relating to signage and safety information, and the role of visitor information centres.
- New road construction where existing towns are being bypassed means that these towns need to develop new tourism attractions to bring the travelers back to town.
- The aging ‘baby boom’ generation provides an enormous opportunity for automobile touring but will significant increases in the quality and range of services available in remote areas in order to encourage them to travel. Some opportunities lie in the area of new communication technology.
- Finally, the product market approach places emphasis on the skills and resources of people to adapt to change. These people may live in remote or rural areas where support for these changes is not readily available.

Appendix – Author Profiles

Samuel Budge: Research assistant with the Centre for Regional Tourism Research at Southern Cross University.

Dean Carson: Senior Research Fellow with the Centre for Regional Tourism Research at Southern Cross University.

Ros Derrett: Projects Manager with the Centre for Regional Tourism Research and Director of the Southern Cross University Regional Gateway.

Ian Kelly: Well travelled tourism academic and geographer now residing in Adelaide. Among many projects is the editor of the Australian Regional Tourism Convention's annual Regional Tourism Handbook.

Kathy Marles: PhD candidate at Griffith University on the Gold Coast. Conducting research on behalf of the Cooperative Research Centre for Sustainable Tourism.

Mark Olsen: Manager of the Drive Tourism Unit with Tourism Queensland.

Bruce Prideaux: Senior Lecturer in the School of Tourism and Leisure Management at the University of Queensland.

Noel Scott: PhD candidate at Griffith University on the Gold Coast. Conducting research on behalf of the Cooperative Research Centre for Sustainable Tourism.

Mike Spark: Lecturer in Marketing at Swinburne University, Lillydale campus.

Rowan Sproule: Director of Tourism Development with Tourism Tasmania.

Iain Waller: Academic Coordinator with the Centre for Regional Tourism Research at Southern Cross University.

Christian Ware: Lecturer in the Tourism Program within the School of Business at James Cook University.

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DRIVE TOURISM

UP THE WALL AND AROUND THE BEND

This book presents research into the relationship between self-drive transport and tourism development. The quantitative significance of self-drive tourism is described and a variety of features of self-drive markets are explored. Our aim is to identify the diversity of research issues associated with self-drive tourism, and to present some models that can shed light on this diversity. It is interesting to note that despite 80 per cent of domestic tourists arriving at their destination by car, there is little discussion of drive tourism in the literature and almost none in the Australian context.

The book addresses this gap and contains a variety of contributions from Australian academic and industry-based researchers. Its genesis was research conducted by the Centre for Regional Tourism Research, a partnership between the Cooperative Research Centre for Sustainable Tourism and Southern Cross University.

The research concentrates on the importance of self-drive tourism for regional Australia and is presented within the following frameworks:

- Self-drive tourism is complex and diverse, encompassing markets, locations, and impacts. Self drive is overwhelmingly the most substantial component of the transport mix in Australian tourism;

- Understanding self-drive tourism is particularly important for regional tourism destinations;

- Self-drive tourists are most usually domestic tourists, but there are key international markets represented as well; and

- Understanding the characteristics of self-drive tourists and the nature of visitor flows is central to the sustainable development of tourism in many destinations, and for the success of many tourism products.

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