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National Library of Australia Cataloguing in Publication Data

Regional touring route travellers : users’ motivations, attitudes and behaviours in Queensland and Tasmania.

Bibliography.

1. Tourism - Queensland. 2. Tourism - Tasmania. 3. Tourists - Queensland - Attitudes. 4. Tourists - Tasmania - Attitudes. I. Hardy, Anne. II. Cooperative Research Centre for Sustainable Tourism. III. Title.

338.479109943

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Acknowledgements

This research was funded by the Sustainable Tourism Cooperative Research Centre, an Australian Government Initiative, the Queensland Heritage Trails Network and Tourism Queensland.

Appreciation is also extended to all those involved from Tourism Tasmania, the University of Tasmania and the University of Queensland.
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ABSTRACT

This study explores the motivations, attitudes and behaviours of tourists on themed touring routes (trails) in Queensland and Tasmania, Australia. The results provide insight into the travellers, their preferred holiday style, motivation, patterns of planning, travel and en route behaviour, use of themed touring routes and their views on destinations. Important differences were found to exist between the touring groups in the two states.

The Queensland sample was a mature age group who were taking extended holidays with the specific objective of experiencing outback Queensland, especially its social, cultural and environmental dimensions. They were a uniformly independent group seeking the freedom that road travel provides. Retired couples from a diversity of backgrounds and locations dominated the group.

The Tasmanian group was a younger group, seeking short-term experiences. The group was dominated by a relatively high socio-economic demographic who were predominately still in the workforce.

Key conclusions for the industry are that the research findings do not support the hypothesis of a ‘touring route user’. While many travellers were aware of the routes in both States and had travelled on other touring routes, the notion of touring underpinned by the freedom to go where you want, over-rides any route preference. That is, most visitors expressed a preference for mixing and matching routes to get to the places and experiences they desired. Further, the results on what motivated people to travel on a particular route was dominated by functional reasons, with very few people choosing a route for its theme or story.

This research also highlights that management and co-ordination issues are important aspects of the non-systemic improvement and the building of innovation along themed touring routes. The results of this study show that in both Tasmania and Queensland, respondents have a preference for adventure, freedom and roaming. Moreover the analysis revealed the importance of the ‘experience’ as well as the importance of understanding how people live. The Queensland group differed from the Tasmanian group by being at a more mature stage of their tourism life cycle with a significant emphasis on self actualising behaviour; an observation that is consistent with analysis of the segmental change factors for the holiday preference groups identified in this study. Further, it has been proposed that the Tasmanian group have the characteristics of a group who could, with maturity and retirement, be recruited to the behaviour demonstrated by the Queensland group.

Finally, the discovery of a distinctive roaming route orientated group warrants further investigation. If this finding is confirmed it has implications for market growth in inland tourism.
SUMMARY

This study explores the motivations, attitudes and behaviours of tourists on themed touring routes (trails) in Queensland and Tasmania, Australia. The results provide insight into travellers preferred holiday style, motivation, patterns of planning, travel and en route behaviour use of themed touring routes and their views on destinations. The study was a joint initiative of the University of Tasmania, the University of Queensland, Tourism Queensland, Tourism Tasmania and the Queensland Heritage Trails Network. It was designed to complement the existing data used by both government agencies such as the BDA segments, as well as state specific data sets such as the Tasmanian Visitor Survey (TVS) and Tourism Queensland Commissioned Road Traveller Surveys.

The study is industry relevant because it fits into the overall planning context of Tourism Tasmania, who have recently developed a touring route strategy, and Tourism Queensland who established a Drive Tourism Program in conjunction with the Queensland Government’s Queensland Heritage Trails Network (QHTN). The product is regional touring route data which complements, rather than replicates pre-existing data.

Data was collected using a combination of quantitative and qualitative interviews and the key findings are:

- The Queensland sample was a subset of the overall drive market to the state. When comparing this sample with the Queensland long-haul drive market, this sample was skewed towards more ‘pioneer’ type travellers. This group was more interested in ‘real’ experiences, less ‘touristy things’ like nature, and avoid the ‘icons’ and the heavily trafficked routes. This was demonstrated in their route choices and planning behaviour.
- The Queensland sample consisted of older retirees, mostly travelling without children, whilst the Tasmanian sample was typically younger and still working. A major difference between the samples was that the Queensland sample was mostly retired while a large proportion of the Tasmania visitors were still employed.
- The Tasmanian sample was more likely to be on destination oriented trips than touring about from the main destination. The Queensland sample on the other hand was more interested in ‘touring’ with or without a main destination in mind.
- Both the Queensland and Tasmanian samples were repeat drive market holidayers, who took drive holidays for the freedom, the landscape and the reduced stress.
- Their familiarity with driving holidays was demonstrated in their above average recognition of the current drive trails and in how they choose routes for the attractions and for functional reasons. Those surveyed showed a significantly lower level of trip planning than the mainstream market, or perhaps a lower acknowledgement of trip planning, considering they still used a lot of traditional information sources.
- The reported use of information sources showed a higher level of familiarity and desire to get ‘real’ information than, relying on sources such as ‘word of mouth’ and ‘visitor information centres’ when on the road.
- The destination was the first decision in planning their holiday, then the route, although both are considered important by the sample. The qualitative research showed that the routes provide the market with ‘options’ for planning but that drive tourists in Queensland are not going to be sold by what is in the tourism marketing material.
- The qualitative research further supports the ‘untourist’ preferences of the Queensland sample, highlighting that they enjoy most the experiences that were unplanned and / or considered to be ‘unplannable’, they did not enjoy the ‘icon’ attractions as much, and preferred to avoid the busier roads (e.g. Bruce Highway) or ‘milkruns’.
Chapter 1

Introduction

This collaborative study is a joint initiative of the University of Tasmania, the University of Queensland, Tourism Queensland, Tourism Tasmania, the Queensland Heritage Trails Network and the Sustainable Tourism CRC. It is the culmination of collaborative work conducted on themed touring route development between both states. The study sought to understand the motivations, attitudes and behaviour of self drive travellers on themed regional touring routes (trails) in Queensland and Tasmania. It involved two stages of data collection: quantitative surveys which were conducted in Queensland and Tasmania, and qualitative clarification (telephone) interviews of travellers recruited from the Queensland interviewees. The study provides insights into the motivations, attitudes and behaviours of tourists on themed touring routes (trails) and how the industry can improve the trail experience.

Literature Review

Visitors following themed routes are not a new phenomenon to tourism. Route 66, the Blue Ridge Parkway in the United States of America, the Silk Road across Asia and the Birdsville Track in Australia are examples of routes that facilitate this form of tourism (Rosenow & Pulsipher 1979; The Presidential Commission on America’s Outdoors 1987; Olsen 2003; Hardy 2003). Since the advent of the motor vehicle, drive tourism has been an important component for the growth of many Australian tourist destinations since the 1950s. During this time, infrastructure along access routes developed, often in an un-planned way, to become an important component of the tourism industry in terms of capital investment and the tourist experience. More recently, the emergence of the peri-urban, short stay market in the 1980s was drive based. Today, drive tourism continues to be a significant component of journeys. However, people with different motivations and characteristics are undertaking other journeys beyond the traditional access routes. In Australia, the size of this self-drive market has now been recognised and in turn, many new touring routes have been developed in an attempt to respond to this trend (Hardy et al. 2005).

What has emerged is a spectrum of tourism-associated driving opportunities. These are built on existing infrastructure that has been parallel branded as different types of routes with different types and levels of supporting infrastructure. The consequence is that there is a mixture of general use and specific tourism uses. Tourism market segmentation on these routes is influenced by technology (e.g. vehicle capacity and reliability), infrastructure (e.g. road quality and accommodation along the route), and a shift in user motivations to the combination of route and destination merging to become the tourist experience (see Figure 1).

Figure 1: A spectrum of the status of touring routes
REGIONAL TOURING ROUTE TRAVELLERS

Today, vehicles can travel further, with greater reliability, greater human comfort and over a greater diversity of terrain and road quality. This provides opportunities for new types of drive holidays including short breaks (one to three nights) and short tours (four to seven days). With improved road conditions and service availability (e.g. refuelling stations, motels and camp grounds), travellers can use routes to travel safely with greater convenience. Along with the growing number of ‘grey nomads’ on the road and the uncertainty of travel plans of the retiring baby boomers, the market is continually changing. There is evidence of a shift in push factors (e.g. travel motivations) as a result of changes in technology and lifestyle that are satisfied depending on the appropriateness of pull factors such as places, attractions and services. However a lack of research into the changing nature of the drive market has possibly led to mixed success of specific touring route development. That is, development of touring routes that focus on traditional product (attractions) development and destination approaches possibly do not match many traveller’s interests in the route itself: its community, environmental and heritage dimensions.

The proliferation of touring routes have allowed a classification to be suggested that covers the range in length and importance of routes from themed tourist ways of national significance, through tourist drives of national significance, to short drives of local significance (Standards Australia 1990). Such descriptive typology of touring routes adequately indicates ‘the road’ but poorly defines, at least at present, the journey or experience. That is, the classification defines travel conditions (roads for cars) but not experiences for people. Such typologies reflect a technical engineering approach to touring rather than considering touring as a social phenomenon. The danger is that with a technical perspective, the response to facilitating tourism needs will be addressed with technical solutions, rather than social and human solutions.

For simplicity, this report assumes that themed touring routes may be generically defined. This is a deviation from the definitions provided by Standards Australia, whereby ‘tourist ways’, ‘tourist drives’ and ‘short drives’ are defined differently given their differences in length and managerial structure. We believe that all touring routes are faced with similar innovation issues (see Figure 1) such as a need to understand their client base, involving stakeholders in the ongoing management of the touring route, providing clear and effective visitor information for the planning and during the actual journey, regardless of their length or regulatory structure (Hardy 2003). Moreover there is a need to develop effective continuous improvement and innovation systems that work for a dispersed industry.

If touring routes are defined as ‘identifiable routes on roads that are promoted by organisations using maps signs, brochures or audio material, which may be linear or circular, and pass or provide access to key attributes of the area’, they, by definition, vary in length, configuration, route quality and environmental context (Hardy et al. 2005). These are important dimensions of planning, marketing and managing touring routes because they significantly affect the market and user experience. That is, by inference and through management, the definition can accommodate different types of users (market segments).

Recent research has focused on the managerial and supply aspects of touring routes. The National Centre for Tourism (NCT) (2001) developed a model that included the ingredients for successful touring routes. It suggests that to establish attractions and services that meet the needs of the market, it is essential that touring routes include adequate signage, safe and contextually appropriate roads, adequate infrastructure, and distinctive themes or images to represent their comparative advantage. While the ‘theme-ing’ concept adds an experiential dimension, the emphasis remains on development of road-associated infrastructure (the physical and technical domains) and not on user needs in the social domain, such as services relating to environmental and socio-cultural context. The emphasis remains on road users, not ‘travellers’. The NCT also suggested factors necessary to meet basic visitor needs along themed tourism routes. These include: a reason to stop in a town or attraction; adequate signage, safe access and supporting information; good roads; access to clean facilities and shelter; quality visitor services; facilities which are open and convenient to access; and friendly local services (NCT 2001).

Hardy (2003) suggested additional principles for ensuring touring routes were developed successfully. These included pre-trip planning information, thematic interpretation and protection of the core natural and cultural resources. These inclusions in the successful touring route equation start to address the changing nature of travellers but addressing motivations remains implied and often ignored when contemporary development of touring routes is attempted.

Olsen (2003) notes that the extent to which touring routes are integrated as whole products varies within Australia. This ranges from those that contain fully integrated signage, pre-trip planning and promotional material, through to those that are promoted but have little road signage and pre-trip planning information; and those that are simply signed but not actively promoted (see Figure 2). However, the inherent assumption in this model is that these are the only relevant dimensions of touring routes and reflect a technical development approach to developing touring routes.
Figure 2: Dimensions of themed routes (Olsen 2003)

Integrated  
Signage (including Tourist Drives)  
Promotional material  
Trip-planning material

Promoted  
Well promoted  
Little on-road signage  
Some trip-planning information

Signed  
On-road signage  
Limited attractions  
Little active route promotion

What does not emerge in this analysis is how the human capital factors of cooperation along the route are to be established and managed. In addition, the supply side focus of the work means there is a significant lack of knowledge of who uses touring routes, why they are used, and how they are used. Moreover, little exists on the critical area of how supply and demand interact through mechanisms such as service providers and cooperative route management and product maintenance. These data are essential for touring routes to be designed and managed in the most effective manner possible. For example, if a traveller group seeks freedom, flexibility and serendipity, then a dominant formal, structured presentation of opportunities along a route may not act as a motivator to travel.

Tourism Queensland and the Queensland Heritage Trails Network have largely led research on touring route users in Queensland and Australia (Hardy 2003). There, it is estimated that about 35% of the drive tourism market will travel between 4 and 22+ nights and inject A$3.1b to the economy of Queensland per year (Olsen 2003). In Queensland, long-haul drive tourists perceive themselves to be travellers, not tourists (Trimble 1999, cited in Olsen 2003) and research has shown that routes and destinations are often selected before leaving home and over 60% of the route planning is done before leaving home (Yann et al. 1999, cited in Olsen 2003). However, research has also found that visitors prefer to be flexible, highlighting the importance of maps, visitor centres and road signage (Market and Communications Research 2002, Millard Brown 2000, cited in Olsen 2003). This suggests that the conventional way of understanding users of touring routes needs to be replaced with more innovative research, analysis and product development, which focuses on not only conventional tourism variables, but also those that embrace the preference and behaviour of travellers. Additional work on the receiving community/traveller interaction is probably also needed, as is work on aspects of social and human capital in receiving communities.

This study seeks to better understand and potentially fill some of the gaps in the research regarding users of touring routes including: awareness of touring routes; the degree to which they are ‘used’; the integration of routes with free independent travel experiences and if a ‘touring route user’ exists as a definable market segment. In addition, whether visitors rate touring routes as attractions in their own right, or as means to reach destinations is unknown. It is imperative that these questions be addressed as a basis for innovation development. Appropriately designed data gathering instruments and survey strategies are needed that can be integrated with existing data gathered by the Australian Bureau of Statistics, the Bureau of Tourism Research, the Sustainable Tourism CRC, and national and state tourism agencies. These needs provided the impetus for this research.
Chapter 2

Methodology

The project sought to study tourists using selected touring routes in Queensland and Tasmania. In each case, the route choice reflected the dominant touring style in the state. The Queensland sample focused on sample sites (Longreach and Charters Towers) that would yield long haul outback travellers. The Tasmanian sample (Strahan) was drawn from travellers on the short haul route between Hobart and Strahan.

Successive drafts of the survey were developed using a pilot study, existing visitor surveys (Tourism Tasmania and Tourism Queensland), national visitor survey categories, a standardised survey methodology for visitors to natural areas (Horneman, Beeton & Hockings 2002) and standardised segmental discriminators (Horneman 1999; Horneman, Carter, Wei & Rhys 2002). Because of the geographical differences between touring routes between the two states, questions were modified to suit local circumstances. This was done while maintaining comparability in core areas.

The surveys were designed to include the following components:

- Filtering question to identify target travellers;
- Questions seeking information on travel type, duration, strategy and characterisation;
- Questions on push and pull motivational variables;
- Questions on route components including planning, on route orientation, travel characterisation;
- Questions on travel habits and preferences; and
- Questions on standardised demographic variables.

In both Tasmania and Queensland, a convenience sampling approach was selected to maximise the number of travellers interviewed. Face to face interviews were conducted from the survey instrument, using show cards where appropriate. Two interviewers at each location were used. Written instructions were given to define the interview protocol and interviewers were instructed to seek to balance gender, age and if necessary, apparent ethnicity (found not to be relevant).

In Tasmania, Strahan (Strahan Activities Centre and the ‘Cosy Cabin’ Cabin Park/Campground) was selected as the location for the administration of the surveys. Strahan was selected because it is a highly visited site at the start and finish of a themed route called ‘The Wild Way’. Visitors who had travelled between Hobart and Strahan were interviewed and a small proportion (approximately 15%) of those who were yet to travel the route therefore could not complete the entire interview. Instead, they were interviewed by telephone upon return from their journey. The surveys were conducted from 12-16 February and 23-24 April 2003, which were both during school holiday periods. 322 valid responses were received. ‘Invalid’ responses resulted from opening filtering questions that aimed to target visitors to the sampling sites who were indeed travelling for tourism/holiday reasons. Few ‘invalid’ responses resulted as the majority of travellers were on holiday and driving their own car.

In Queensland, Longreach (Qantas Founders Museum and local campgrounds) and Charters Towers (Visitor Information Centre and local campgrounds) were selected as the locations for administration of the surveys (see Appendix B). These sites were selected because they were on existing touring routes, were major centres of population, had well known tourism products, and had suitable on-site support to facilitate smooth administration of the surveys. The surveys were conducted in the Queensland school holiday period between 6-12 July (Charters Towers) and 13-20 July 2003 (Longreach). There were 480 valid responses received. ‘Invalid’ responses resulted from opening filtering questions that aimed to target visitors to the sampling sites who were indeed travelling for tourism/holiday reasons. Most of the ‘invalid’ responses came from Charters Towers, where there was a relatively high level of business travellers. At the completion of the interview, respondents were asked if they wished to be involved in further research, 79 of the 480 who responded said yes. Of these 24 could be contacted and interviews were arranged with 12.

Surveys for both Tasmania and Queensland were entered, data was checked and subsequently analysed using standard data analysis procedures. A small unrepresentative and opportunistic sample of travellers selected from the Queensland sample was interviewed to clarify the traveller’s experiences and seek insights into some behaviours.

In December 2003, following the completion of the quantitative analysis, respondents in the Queensland survey who had left their contact details were asked to participate in a telephone interview. The purpose of these interviews was to conduct in-depth, qualitative interviews which would explore travellers decision making
processes and perceptions of the touring routes in further detail (see Appendix B). The questions for this qualitative phase were formulated iteratively and were based upon the data analysed in the quantitative phase. Questions which were asked addressed the following issues:

- Understanding of what a themed route is;
- Recollection of promotional material;
- Reasons for choosing a route;
- Motivation for going on holiday;
- Influence of themed route upon decision making;
- Influence that themed route had upon relationships;
- Perception of importance of surprises, travel experience, people, what could be done to improve the journey;
- Impact of journey;
- Perception of what makes a good drive tourism experience; and
- Perception of likelihood of return visit.

During the interview, notes were taken and the text was analysed using the constant comparative method which sought emergent themes and sub categories.
Chapter 3

Results of Quantitative Surveys

The Travellers

For Tasmania, a total of 322 valid surveys were completed at Strahan. In Queensland a total of 480 valid surveys were completed; 68% from Longreach and 32% from Charters Towers. Results are presented systematically with comparisons of the two samples made as appropriate. Additional data from other surveys are introduced where they add to the data exploration. The additional data came from the Road Travellers Study (Enhance Management 2002) conducted for Tourism Queensland (referred to as the ‘Big 4’ study) into the drive tourism market conducted in caravan parks across the state, and Horneman et al. (2002) into the senior travellers. Senior travellers in this case were defined as travellers with a Seniors Card and the Senior Discount Card holders (Office of the Aging in the Queensland Department of Families, Youth and Community Care). This data set was Queensland specific and provides a useful comparison for the results of this survey’s Queensland data.

Age and Employment

In Tasmania, males accounted for 54% of respondents. Sixty-three percent of respondents were under 55 years and the same percentage were employed full time (17% were retired). Sixty-three percent were travelling as couples and 14.8% of the sample were travelling with children (see Table 1 and Figure 3). The sample is skewed towards a middle aged demographic.

Table 1: Age distribution of respondents, Queensland and Tasmania

<table>
<thead>
<tr>
<th>AGE CATEGORY</th>
<th>QUEENSLAND</th>
<th>TASMANIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 – 24</td>
<td>16</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td>3.3%</td>
<td>3.5%</td>
</tr>
<tr>
<td>25 – 34</td>
<td>18</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>3.8%</td>
<td>16.4%</td>
</tr>
<tr>
<td>35 – 44</td>
<td>41</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>8.6%</td>
<td>18.6%</td>
</tr>
<tr>
<td>45 – 54</td>
<td>67</td>
<td>93</td>
</tr>
<tr>
<td></td>
<td>14.0%</td>
<td>28.9%</td>
</tr>
<tr>
<td>55 – 64</td>
<td>184</td>
<td>69</td>
</tr>
<tr>
<td></td>
<td>38.4%</td>
<td>21.4%</td>
</tr>
<tr>
<td>65 plus</td>
<td>152</td>
<td>31</td>
</tr>
<tr>
<td></td>
<td>31.7%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Age not stated</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>0.2%</td>
<td>1.6%</td>
</tr>
<tr>
<td>N</td>
<td>479</td>
<td>322</td>
</tr>
</tbody>
</table>

Figure 3: Status by Age and Employment, Tasmania
In Queensland, males accounted for 56% of respondents. Seventy percent of respondents were 55 years and older (see Figure 4). Eighty two percent were travelling as couples and 59% were retired (see Figure 4). The Queensland sample is clearly skewed towards the more senior demographic, that has been described as the ‘grey nomads’ (retired senior citizens) or ‘empty nesters’ (baby boomers with adult children not living at home). Given this demographic, the survey of travel behaviour by Horneman et al. (2002) is an appropriate comparison for these data when wider issues of motive are explored (see Motivation).

![Figure 4: Employment Status by Age, Queensland](image-url)

**Income**

Sixty-one percent of respondents in Tasmania had an annual household income of over $36,000 and 50% were over $52,000 (see Table 2). This is a reflection of the employment and life cycles stages of the group. In Queensland, 55% had an annual household income of over $36,000 and 34% were over $52,000 (see Table 2). The Horneman et al. (2002) survey found few respondents with a household annual income in excess of $20,000, suggesting that respondents to the present survey are relatively more affluent than the general senior population.

<table>
<thead>
<tr>
<th>ANNUAL HOUSEHOLD INCOME</th>
<th>TASMANIA</th>
<th>QUEENSLAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$8300</td>
<td>1.9%</td>
<td>1.0%</td>
</tr>
<tr>
<td>$8300 - $15599</td>
<td>0.6%</td>
<td>4.4%</td>
</tr>
<tr>
<td>$15600 - $25999</td>
<td>2.8%</td>
<td>11.3%</td>
</tr>
<tr>
<td>$26600 - $36399</td>
<td>4.1%</td>
<td>11.5%</td>
</tr>
<tr>
<td>$36400 - $51999</td>
<td>10.7%</td>
<td>14.0%</td>
</tr>
<tr>
<td>$52000 - $77999</td>
<td>17.6%</td>
<td>12.3%</td>
</tr>
<tr>
<td>$78000 - $103999</td>
<td>16.7%</td>
<td>4.8%</td>
</tr>
<tr>
<td>$104000 - $129999</td>
<td>5.7%</td>
<td>0.6%</td>
</tr>
<tr>
<td>$130000+</td>
<td>9.1%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8.8%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Don’t wish to answer</td>
<td>22.0%</td>
<td>22.7%</td>
</tr>
</tbody>
</table>
Origin of Travellers

Tasmanian travellers were from either NSW /ACT (29.2%) or Victoria (26.4%) with a strong representation of local travellers (19.2%). Queensland travellers were either Queensland residents (36%) or from regional New South Wales (31.3%) and Victoria (19.9%) (see Figure 5).

Figure 5: Origin of respondents by Australian postcodes Queensland and Tasmania

Drive Holiday Behaviour

Because of the differences in the scale of road travelling in Queensland and Tasmania, the surveys for each state were slightly different. On the Queensland survey the question sought information on the number of trips of four days or more in the last three years, whereas in Tasmania the number of rips was two days or more in the last three years. A significant proportion of Tasmanian and Queensland travellers were on their second to fourth drive holiday in the last three years respectively (78.1% Queensland and 59.1% Tasmania). In addition 6.9% of Tasmanian travellers were in their 13th or greater trip number in the last three years (see Figure 6). The overall picture is that respondents are largely seasoned travellers, who seek out drive tourism opportunities on a regular basis.

Figure 6: Trips in last three years over 2 nights for Tasmania and 4 nights for Queensland
Overview

In lifecycle terms, the Queensland travellers were at a later lifecycle stage: they were older, the travellers were retired and consequently had lower income levels.

The Tasmanian sample was dominated by interstate travellers from New South Wales and Victoria, whereas Queensland had a large intrastate component. Both groups were ‘dedicated travellers’ that is taking two or more drive holidays in the past three years (Queensland 78.1% and Tasmania 59.1%). A feature of the Tasmanian data was a group of 6.9% who travelled very frequently (more than 13 times in the last three years). The most likely explanation for this group was that they were recruited from the 19.2% of the Tasmanian survey who were locals. The Queensland and Tasmanian samples had in common their frequency of previous drive trips suggesting they possibly originated from the same or similar motivational profiles (preferring drive holidays). However, the Tasmanian travellers were still by and large in employment.

Traveller’s Preferences

Holiday Types

Tasmanian and Queensland respondents had similar holiday selection behaviours, having undertaken a variety of holiday forms in the last three years. There was a dominance of driving holidays, especially touring based holidays (see Figures 7 and 8). There was a high proportion of ‘dedicated tourers’, who had taken two or more touring style holidays in the past three years, especially in Queensland, with many indicating that they had undertaken similar driving holidays two and three times over the past three years.

Figure 7: Number of times particular holiday types were taken in the last 3 years, Tasmania
Queensland respondents were also questioned on their preferred holiday type using established holiday descriptors originally developed by the Joseph Banks Group (1984) and retested by Horneman (1999). These segments were also used in the Queensland Seniors Survey (Horneman et al. 2002). Horneman’s work illustrated that six market segments of tourists may be identified according to their push and pull motivations for travel. These six segments have been named as Conservatives, Indulgers, Aussies, Enthusiasts, Big Spenders, and Pioneers (see Table 3).

Table 3: Attitudinal and behavioural profiles of the six market segments and corresponding segment

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>DESCRIPTION</th>
<th>DISCRIMINATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enthusiast</td>
<td>High energy, group forming, highly experiential, socially directed, young, free spenders.</td>
<td>A place which attracts the right good time party crowd.</td>
</tr>
<tr>
<td>Big Spender</td>
<td>Older, passive, status conscious, outer-directed, free spenders on ego-enhancement, luxury loving, acquisitive and materialistic.</td>
<td>A place where you can take in the sights, dine in luxury and have first class entertainment.</td>
</tr>
<tr>
<td>Pioneer</td>
<td>The main trend setting group. Inner-directed, individual, active, avoids commercial ventures, committed environmentalists and conservationists. Well educated and free spenders.</td>
<td>A place where tourists rarely go, where you can pioneer new places, people and experiences.</td>
</tr>
<tr>
<td>Conservative</td>
<td>Older, passive, conservative, home-bound, lack confidence, group travel and cautious spenders.</td>
<td>A reliable package tour which covers all the best spots.</td>
</tr>
<tr>
<td>Indulger</td>
<td>A trend setting group. Passive, individual, inner-directed, well-educated, free spenders on self indulgence, food and wine conscious, stylish, conservationists and environmentalists at heart.</td>
<td>An exclusive retreat with great local food and wine.</td>
</tr>
<tr>
<td>Aussie</td>
<td>Active, adventurous, group (family) travellers, outer-directed, sporting enthusiasts, older, cautious spenders.</td>
<td>A place with a real Aussie family environment.</td>
</tr>
</tbody>
</table>

Source: Joseph Banks Group (1984)
The holiday behaviour of the Queensland respondents corresponded to their preferred holiday style (see Figure 9), with a preponderance of the ‘Pioneer’ and ‘Aussie’ Australian market segments.

Figure 9: Queensland respondent’s preferred holiday type

<table>
<thead>
<tr>
<th>MARKET SEGMENT</th>
<th>THIS SURVEY QUEENSLAND ONLY (%) (n=480)</th>
<th>SENIORS SURVEY QUEENSLAND (%) (n=724) (Horneman et al. 2002)</th>
<th>AUSTRALIAN DOMESTIC MARKET Weighted sample by Newspoll conducted twice (Horneman 1999)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pioneers</td>
<td>62</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Aussies</td>
<td>20</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Conservatives</td>
<td>9</td>
<td>45</td>
<td>12</td>
</tr>
<tr>
<td>Big spenders</td>
<td>6</td>
<td>11</td>
<td>23</td>
</tr>
<tr>
<td>Enthusiasts</td>
<td>2</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Indulgers</td>
<td>1</td>
<td>4</td>
<td>20</td>
</tr>
</tbody>
</table>

Table 4 shows that the Queensland sample had an over-representation of ‘pioneer’ travel types and an under-representation of ‘big spenders’ and indulgers’. This supports suggests a skew in the sample that indicates these results may be viewed as a segment of the overall long-haul drive market, as opposed to representing the entire market. These results are further supported when examining the travel patterns and planning behaviours.

Overview

Compared with the Australian domestic market (Horneman 1999) and the seniors market (Horneman et al. 2002), the Queensland respondents were strongly skewed towards the Pioneer market segments and away from the ‘big spenders’ and ‘indulgers’ (see Table 4). This suggests that these respondents to this survey were a particular subset of the Australian domestic and seniors market. Table 2 presents comparative data for the three times the market segments have been used. These results were consistent with the age, retirement and income profiles.

Horneman’s (1999) findings would suggest that the ‘pioneer’ segment are motivated by factors such as a return to basics, the seeking of natural environments, the reduction of stress, the avoiding of tourists and the seeking of heritage and historic experiences. The implications of the skew towards ‘pioneers’ are discussed further in the section on travel motivations.

Travel Patterns

Method and Travel Group for This Trip

The holidaying Tasmanian respondents were mostly largely free independent travellers (98.7%), who were driving their own vehicle or a rental vehicle (n = 205) (see Figure 10). Of those, most were travelling as a couple (58.5%) or with children (14.8%) or friends (12.6%) (see Figure 11).
In Queensland, travellers were driving their own car or campervan 92% (see Figure 10) and travelling as a couple without children (see Figure 11). Further, the Queensland survey assessed the use of specific highways and found that most holiday travellers avoided the Bruce Highway (Highway 1). The Bruce Highway would typically carry around 60% of the long-haul drive market, and Figure 12 indicates that only 19% of all travellers in the survey used the Bruce Highway (Brisbane to Cairns) at any time during their trip. This evidence supports the proposal that this survey had only a subset of the total market. These data also support the earlier
interpretation that respondents tended to be experienced travellers fitting the ‘grey nomads’ and ‘empty nesters’ description developed by other authors (Horneman et al. 2002).

**Figure 12: Travel direction, Queensland**

![Map showing travel direction in Queensland](map.png)

**Travel Strategy**

Studies undertaken by Tourism Queensland of the drive market have found the market utilises five major travel strategies:

1. Driving straight to a main destination with no overnight stopovers in either direction except at the main destination;
2. Driving straight to a main destination with overnight stopovers in either direction;
3. Touring around spending a night or two in several places with no main destination;
4. Touring around spending a night or two in several places with a main destination in which you spend a week or so; and
5. Driving to a main destination, then touring around spending a night in several locations.

These strategies are presented diagrammatically in Figure 13.
Figure 13: Travel strategies (used with show cards during the Queensland surveys for this study based on Big 4 Methodology Tourism Queensland)

The predominant travel strategy in Tasmania (62.6% of respondents) was driving to a main destination and then touring around spending a night in several locations (see Figure 14). In Queensland, respondents’ preferred the ‘touring’ style of holiday, 41% with no main destination (Strategy 3) in mind and 18% with a main destination in mind (Strategy 4). Both results are a major shift from that recorded in the Tourism Queensland Big 4, research where the ‘no destination’ touring strategy was preferred by 28% of the market and touring with a destination was preferred by 31% of the market (Enhance Management 2002).

Figure 14: Travel strategies Tasmania, Queensland and aggregate Big 4 (Tourism Queensland)

The Tasmanian results (travel to main destination then use this as a base for local and regional travel) was consistent with all existing research into the destination. It would appear however that the Queensland sample included a group that were non-destination oriented: explorers who shunned the popular routes. This hypothesis is supported by the over representation of Pioneers in the sample 62%, their choice of more inland routes (only 19% using the Bruce Highway as opposed to 80%) and the over-representation of ‘touring with no main destination’ holiday preferences.

Trip Length
Tasmanian travellers were generally on holidays of less than two weeks; with 51% on holiday for one to two weeks and 32% on holiday for less than a week. Only 3% were on trips for longer than a month. In contrast, more than 50% of the Queensland travellers were on trips longer than a month, with 35% on trips longer than six weeks, only 6% were on trips less than a week (see Figure 15). The Tourism Queensland Big 4 survey data
found similar proportions on extended trips (four or more weeks) accounting for 51% of the sample, but significantly less travelling for two to four weeks (15% compared to 31% in this survey) (Enhance Management 2002). Again this supports the notion of a sub-sample rather than a change in travel patterns for the long-haul drive market.

Accommodation
Queensland respondents tended to stay in commercial campground type accommodation (42.1%), free camping (26.8%) and hotel/motel types of accommodation (18.8%). In Tasmania, hotel/motel type accommodation dominated (42%), with only 12% of travellers choosing commercial campgrounds (see Figure 16). The differences between Tasmania and Queensland may be explained by availability and pricing of accommodation for the different markets, with the Queensland market potentially more price sensitive due to their length of trip and average income.
Overview
Generally, Tasmanian travellers were predominantly couples who still worked and travelled without their children. They drove the selected route to reach a destination, which they then used as a base for additional road travel for less than two weeks. They stayed in hotel/motel style accommodation with very little camping.

This profile is somewhat different to that of the Queensland travellers interviewed. Queensland travellers were older retired couples. While they were touring, with or without a major destination in mind much more roaming behaviour was evident (see discussion of destinations and routes). Their holiday was well over two weeks, usually a month or more. They stayed in campground style accommodation, making use of free camping when possible.

Travel Motivations and Attractions

Travel Motivations
For both Queensland and Tasmanian respondents, the principal travel motivations were in descending order:
- To see Australia;
- To see specific places;
- Rest and relaxation;
- Adventure and exploration;
- To learn about a new area;
- A change of routine and lifestyle; and
- To escape from everyday life.

The factors that were less important motivations were to discover more about themselves, to socialise with family or friends, to achieve an ambition, or to be respected by their peers/tell others about the trip (see Figure 23). One response not used in the Tasmanian survey (i.e. ‘to escape’ and ‘learn about heritage’) received significant scores in the Queensland sample (see Figure 17).

Figure 17: Mean score of travel motivations, Tasmania and Queensland

![Mean score of travel motivations, Tasmania and Queensland](image-url)
Some differences between the Tasmanian and Queensland respondents do exist. Tasmanians were less motivated to tell others about their experiences than Queensland travellers and to discover more about themselves (see Figures 18 and 19).

**Figure 18: Motivations to travel, Tasmania**

![Motivations to travel, Tasmania graph](image1)

**Figure 19: Motivations to travel, Queensland**

![Motivations to travel, Queensland graph](image2)
These results are consistent with the motivations typically expressed by the Pioneer market segments defined by Horneman (1999) and the motivations found for the seniors market by Horneman et al. (2002) except that being with friends and family was a greater motivation for the general senior population. That is, while the respondents express motivations that match Horneman’s market segments of Pioneers and Aussies, as well as that of seniors from Horneman et al., this group was clearly travelling for reasons other than being with family (and friends).

### Destination Choice - Attractions and Constraints

In both destinations, respondents were primarily attracted to the scenery, followed by the freedom to be able to travel where and when they wanted, and the heritage. The outback landscape was particularly important for Queensland respondents, as was learning about places, wildlife, and sites of aboriginal significance. Conversely, Tasmanian visitors were attracted to food and wine, and more affected by time constraints in the decision making process (see Figure 20).

![Figure 20: Mean score of travel attractions, Tasmania and Queensland](image)

When choosing their destination in both Tasmania and Queensland, respondents were less interested in Aboriginal sites and culture and routes with a story or theme. However, considerable variation did occur, suggesting more complexity in the market than is described here (see Figures 21 and 22).
Users’ motivations, attitudes and behaviour in Queensland and Tasmania

Figure 21: Travel attractions, Tasmania

![Travel attractions, Tasmania graph]

Figure 22: Travel attractions, Queensland

![Travel attractions, Queensland graph]
Overview
To experience the landscape of Australia through visiting places was an important motivation for both Tasmanian and Queensland respondents. They sought rest and relaxation through adventure and exploration and learning about the places they visited. They travelled to escape their every day life. Socialising was not a motivation, nor was the motivations of achieving an ambition or to be able to tell others about their adventures. However, the Queensland respondents did see the latter as being more important than their Tasmanian counterparts.

Freedom to do what they wanted, when they wanted was a very important attractant. Scenery also attracted, and for the Queensland group, learning about places visited, wildlife, and sites of cultural significance (non-Aboriginal) were also important.

Time and budget were rarely constraints in choosing the destination. Given that this group preferred budget or free accommodation, it appears that they chose this form of accommodation as part of their travel experience rather than being constrained by cost. However, there may be other issues involved.

Tasmanian respondents were more time conscious and less attracted to the destination by indigenous attractions, but more interested in local cuisine and food. Again, product segmentation may be involved, but the attractiveness of such opportunities reflects market segmentation and life cycle, where the Queensland group was a relatively wealthy retired group, while the Tasmanian respondents were well off, pre-retirement and time constrained. Nevertheless, both groups had a major desire to have the freedom to explore.

Selecting Travel Routes

Reason for Selecting a Route
Tasmanian respondents appear to be restricted in the choice of route with 62% identifying the route taken as the only one available and 30% identifying it as the most convenient. Scenic qualities of the route were also important in the choice of route (see Figure 23).

The opportunity to choose a route was less of an issue for Queensland respondents (10%), who chose a travel route because they were simply the most convenient (27%) or because it afforded an opportunity to explore somewhere they had not been before (29%) (see Figure 23).
Knowledge of the Themed Route Being Traversed

Most Queensland respondents (72% overall) on the Matilda Highway, Overlanders Way or Great Inland Way had heard of the themed routes (see Figure 25). They became aware of the route from a variety of sources, especially a Journeys brochure (18%), and other printed material (see Figure 24). Tourism services such as web sites, information centres and travel agencies seem not to be as influential in this regard (see Figure 24).

In contrast, the Tasmanian respondents were less aware of the themed route on which they were travelling when interviewed: 73% had not heard of the Wild Way (see Figure 26). Those that did recognise the Wild Way indicated that they became aware of it from signage (5% of all interviewees).

Awareness of Themed Routes

Queensland travellers had high recognition of traditional highway names, (e.g. Bruce Highway, more than 50%), but were less able to recall themed route names, except for the route on which they were traveling (see Figure 25). An exception is the Savannah Way, which, while not being extensively marketed, has a number of organisations using the word savannah in their title, hence possibly facilitating recognition.
While recognition of the Wild Way was low in Tasmanian respondents, other routes had relatively high recognition. For example, 52% had heard of the Heritage Highway, 61% had heard of the Tamar Valley Wine Route and 65% had heard of the Huon Trail. Respondents did not appear to be as aware of the East Coast Gourmet Trail or the Convict Trail (see Figure 26).

Figure 26: Awareness of routes, Tasmania

Overview

Queensland respondents perceived they had a choice of travel routes and were familiar with the themed route they were using through various materials. These materials appear to be supported by other media. In Tasmania, there was far less recognition of the themed route being travelled, possibly because The Wild Way promotion had ceased to be funded in the two years prior to this research. While Queensland respondents were more familiar with the traditional highway names, the themed route names had a high level of recognition. Tasmanian respondents had a reasonably high recognition of some themed routes, particularly those with a similar name to product regions in the State (Huon Valley, Tamar Valley). This poses the question of the need to integrate the ‘theme-ing’ of a route with the region to improve recognition. The higher than expected recognition of the Savannah Way suggests the power of cross promotion and the benefit of coordinated product and route branding in creating traveller recognition of themed routes.

Trip Planning

Awareness and Use of Themed Trail Promotional Material

In Queensland, despite many respondents hearing of the Matilda Highway, Overlander’s Way and Great Inland Way through Journeys brochures, few (32%) used the promotional material in planning their trip (10% had not seen the material). This is reflected in the dominant use of traditional road navigational tools such as maps and roadside signs where in both Queensland and Tasmania these were the main tools used (see Figure 27). These results were offset in the qualitative section of the research, highlighting most travellers did undertake some level of planning but were keen to avoid acknowledging a ‘formal’ planning process to avoid clashing with their perceptions of the holiday being about freedom and going where they choose.
Users’ motivations, attitudes and behaviour in Queensland and Tasmania

Figure 27: Navigation aids used Tasmania and Queensland

<table>
<thead>
<tr>
<th>Information sources used</th>
<th>Queensland</th>
<th>Tasmania</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own road map</td>
<td>72.4</td>
<td>41.2</td>
</tr>
<tr>
<td>Local directional signs</td>
<td>41.2</td>
<td>27.6</td>
</tr>
<tr>
<td>Brochure</td>
<td>27.6</td>
<td>19.0</td>
</tr>
<tr>
<td>Touring route map</td>
<td>19.0</td>
<td>18.4</td>
</tr>
<tr>
<td>Touring route signs</td>
<td>18.4</td>
<td>16.2</td>
</tr>
<tr>
<td>Know the route</td>
<td>16.2</td>
<td>14.1</td>
</tr>
<tr>
<td>Motoring club map</td>
<td>14.1</td>
<td>8.1</td>
</tr>
<tr>
<td>Internet map</td>
<td>8.1</td>
<td>3.4</td>
</tr>
<tr>
<td>Rental vehicle map</td>
<td>3.4</td>
<td>0.8</td>
</tr>
<tr>
<td>Other</td>
<td>0.8</td>
<td>3.6</td>
</tr>
</tbody>
</table>

Figure 28: Time spent planning the trip Tasmania and Queensland

Time Spent Planning and Planning Aids

Despite the length of holiday, most respondents claimed to have spent very little time planning their trip. In Queensland 49% did not plan and around 70% spent less than a week planning. Similar results were recorded in Tasmania, however there, 44% of respondents reported planning for a day before undertaking their trip (see Figure 28). Nevertheless, 41% of Queensland respondents and 15% of Tasmanian respondents did say they planned for more than a week.
These data are in marked contrast to the Big 4 research in Queensland which found that only 8% did not do any form of planning, 21% planned for less than a month and just under 70% planned for more than a month (Enhance Management 2002). These comparisons reinforce previous observations that the Queensland respondents are experienced travellers who have travelled the area previously or are sufficiently experienced to believe they do not need to plan ahead. It also matches their motivations for freedom and not to be constrained by schedules. The qualitative research component further explored the disparity between this survey and the Big 4 work indicating a preference for avoiding ‘formal’ planning.

For the Tasmanian respondents, the same could also be said, however, it is more likely that the limited number of route options, the small distances involved and the limited time involved mean that travellers do not see a need to plan ahead.

In terms of detail and the style of immediate planning there was little evidence of daily planning. Greater emphasis was on flexibility (see Figure 29). This is consistent with research in Queensland from the Big 4 study, where 45.8% of respondents made no firm plans for their journey (Enhance Management 2002). There is a conflict between the number of travellers who state they made no firm plans, and the amount of time spent planning. The in-depth interviews helped to clarify this as respondents indicated that while they did collect information, they wanted the freedom to travel where they liked when they liked.

**Figure 29: Planning for this part of the trip Tasmania and Queensland**

Sources of information used for planning paralleled those used for navigating. However word of mouth and the informal information network increased in importance for ‘legs’ of the journey was identified as being the most useful source of information by Queensland respondents (see Figure 30). Tasmanian respondents were not asked to identify their most useful source of information in the planning or en-route stages of their journey.
Users’ motivations, attitudes and behaviour in Queensland and Tasmania

Figure 30: Information sources used for planning, Tasmania, Queensland and Big 4 Queensland

Figure 31: Most useful information source, Queensland
In Queensland, the results pertaining to information sources for planning differ from the Big 4 survey results (Enhance Management 2002). While the categories are different, Tourism Queensland found far greater use of motoring organisation material, previous experience, television programs and state travel centres (see Figure 31). This suggests additional market segmentation to the drive tourism market sampled by the Tourism Queensland data. A number of major differences exist between the samples including the use of the Pacific / Bruce Highway (47% in Big 4; 19% in this research). The Big 4 data includes a more ‘coastal’ orientated market (Enhance Management 2002). In contrast, the data from the current surveys reflects a longer inland holiday group.

Planning on Route

Once travelling, Queensland respondents tended to use the tourist information network and word of mouth for information as well as the ‘traditional’ road map and roadside signs (see Figure 33). In this case, the tourist information network tended to be identified as being the most useful source of information. For the Tasmanian group, roadside signage and previous experience dominated the information sources used (see Figure 32).

Figure 32: Information sources used on route Tasmania and Queensland
The Importance of Destination Versus Route

An important consideration in this research was the role of the route itself (as the experience) versus the emphasis on a destination. Firstly respondents were asked which was important in planning their trip—destinations or routes. Tasmanian respondents were found to be far more destination-oriented than Queensland respondents.

In Queensland only, respondents also were asked what came first in their decision-making the destination or the route and 80% of respondents nominated the destination (see Figure 34).

Figure 33: Most useful information source on route, Queensland

Figure 34: Importance of the destination and route, Tasmania and Queensland
Overview
The level of trip planning reported by both Tasmanian and Queensland respondents was lower than expected. The Queensland results were quite different from the Big 4 research findings (Enhance Management 2002). In particular, they highlighted that the ‘pioneer’ subset of the long-haul market captured in this survey have a more developed sense of the importance of informal over formal information gathering to get the ‘experience’ they seek. Travellers still tend to use the traditional motoring guide maps for planning, suggesting the importance of the basic road quality, travelling time and distance in planning. Given the importance of freedom as a motivation, lack of formal planning is understandable. However, the short trip length and limited route choice for the Tasmanian group possibly means sufficient confidence exists to travel with limited planning. For the Queensland group, where roaming was the preferred style of travel, and where most travellers were highly experienced, planning was possibly seen as an informal process, based on past experience, word of mouth and confidence in seeking out what was sought.

Word of mouth advice was an important information source for the Queensland respondents. While socialising was not a motivation, the Queensland group socialised for the purpose of sharing and gaining information. Just as important was the network of information centres which were seen as sources of information on places to visit and gain local knowledge. In contrast, Tasmanian respondents relied on road signage, reflecting their travel pattern of driving directly to a destination and then exploring.

Destination remained more important than route for both groups (87% Tasmania and 76% Queensland). It can be postulated that the respondents who nominated route as more important than destination is a distinct market that roams around a route exploring.

Figure 35: Trip style preference and first choice of destination or route as a planning determinant, Queensland
Chapter 4

Results: Qualitative Follow-Up Interviews

Introduction
The 12 people interviewed included seven males and five females, 10 were over 55 years of age and their incomes ranged from $15,000 to $130,000 or more from the Queensland sample. Ten were couples, eight were retired and three had part time employment. Five were from New South Wales, six from Victoria and one from Queensland. Seven were ‘Pioneers’, four were ‘Aussies’ and one was an ‘Indulger’. This profile was representative of the overall group referred to in the earlier part of this report. In terms of destination or route preference there were six who reported destination as their first preference and five who nominated route. This is an over representation of the route preference that was 20% in the overall sample.

Understanding of What a Themed Route Constitutes
Respondents understood themed touring routes to be supported by markers, information, signs, brochures, and guidebooks. They were also described as either ‘the most popular route’, ‘an overview of the region’, or ‘just a means to get there’, ‘not meaning much’, or ‘where everyone goes; the milk run’. Consequently it appeared that a great deal of significance was not attached to touring routes and they are regarded more as a guide.

Recollection of Promotional Material
When asked if respondents could recall how the touring route was promoted, there was not a great deal of recollection of promotional material. This may be expected given that the visitors were contacted six months earlier in either Charters Towers or Longreach. However it also suggests that the touring routes may not have played a significant role in the mind of the visitor. However, those that did recall remembered information centres, Matilda Highway information, old maps, and brochures.

Reasons for Choosing a Route
Respondents were asked why they chose their particular route. The majority of the respondents illustrated a strong destination and attraction focus in responding to these questions, mostly choosing the route because they wanted to see the attractions of Western Queensland. For some it was on-route to the Northern Territory or Northern Queensland but most had made a conscious decision to go there because of specific attractions and to experience life in Western Queensland.

On Freedom and the Unexpected
Respondents were asked to comment on their attitudes towards freedom and overwhelmingly, this played a very important role in the mind of the traveller. The notions of roaming, travelling at one’s own speed, and the ability to pick and chose from things which may be offered on the touring route along the way, were very important concepts to these travellers. While freedom was seen as very important, most respondents suggested that they liked the unexpected. They suggested that they enjoyed things such as finding out from the locals what to do and see, or anything that was not in the brochures. This suggests they want ‘leads’ but not all the information in their brochures and pamphlets. This is not to say that other travellers don’t value information.

On Importance of Touring Route as Part of the Drive Holiday Experience
This question revealed some contradictions in terms of visitors’ perceptions of the role of the touring route. When asked to describe the importance of the themed route as part of the drive holiday experience, most respondents stated that it was not an important part of holiday. However many then added that whilst they that wanted to find thing for themselves, touring routes added interest and highlighted key attractions and acted as ‘smorgasbords’, allowing travellers to exercise choice thus retaining an element of freedom. This in part may also be explained by the over representation of ‘touring route users’ in the group interviewed.
Planning
Respondents were asked to what extent they planned before leaving home and what they left to be ‘discovered’ along the way. The responses suggested that almost all respondents undertook some degree of planning. This took the form of a information gathering exercise. ‘Big picture’ factors such as road safety, fuel stops, rest stops, possible places to stay, destinations and distances between stops or destinations were explored. History of the region and flora and fauna also were researched.

It is also worth noting that the amount of planning allowed for a certain amount discovery. Some respondents did not go into detailed planning on purpose to facilitate ‘discovery’, ‘adventure’ and ‘freedom’ on-route: ‘I picked the route, then free sailed’.

An emergent theme from this question and others was that high degrees of planning is not seen as being desirable; indeed it is seen as something which can hinder a trip. For example, one respondent exclaimed: ‘Booking ahead can be frustrating!’

As the interview sample had a higher proportion of respondents who chose their route first, it is interesting to note the consistency of information gathering for ‘big picture’ items and leaving the detail. It is hypothesised that this style of planning would be less prevalent in ‘destination’ style holidays.

Facilities Used
When asked what facilities they used, information centres were the most popular, followed by roadside stops and signs. A strong emergent theme from this question was that respondents repeatedly expressed interest in discovering the stories of how local people lived, including how they made their livelihoods and how they survived the weather and environmental conditions.

Preferred Media Preference for Receiving Stories on Themed Routes
Signage, internet, brochures and word of mouth are important ways for these people when they research stories.

Aspects of the Trip Discussed with Partners and Other People
The responses to the question of discussing the trip with other people illustrated the power of word of mouth. Respondents stressed the importance of sharing experiences and also the role that it plays in planning. Many respondents identified road conditions as being a discussion point with other people. Evidence emerged that some respondents were self contained travellers who kept to themselves but interacted with others through information seeking behaviour. On the topic of discussions with one’s partner, the questions revealed that many decisions are made whilst driving. This supports the survey data that emphasises flexibility on the journey.

Perception of Role of Places and Attractions
When asked to give their opinion on the role of places and attractions some respondents expressed a desire to avoid heavily promoted places. Some reacted positively to natural features such as Carnarvon Gorge and human features such a small ‘natural’ towns. Most expressed dissatisfaction about ‘icon attractions’ in terms of their inability to present what the visitor was seeking. This view is not inconsistent with the Pioneers emphasis on authenticity.

Perception of Role of the Turning Point, Destinations and Taking the Same Route Home
To many respondents, the destination seemed to be only part of the decision making process. Rather, respondents appeared to be more focused on getting to the important places along the route. A different return route was perceived as important but for most of respondents it was not essential. For some, if returning on the same route, it is often done a different speed, i.e. faster/slower than on the way out.

Perception of Role of the Experience and People
For the respondents, the experience was everything. This included: observing people of different cultures, battling roads and car break downs, seeing how people live, and learning the history of Western Queensland. Their holiday experience was about people and livelihoods augmented by attractions and scenery.

‘Fellow travellers and the locals were the experience’, reflects the ‘non touring route user’ element who placed more emphasis on sharing experiences and stories with other travellers and travel partners.
Improving the Journey

Respondents suggested that improvements they would have liked to have seen included information on ‘what is off the main road’, better road side facilities and better road signs. When asked if they would return to Queensland, respondents said they would return to see more places and to see how things had changed. There was a stronger preference to see places they had missed.

Respondents were asked how they describe their journey to friends and revealed that they tell others about the unexpected, specific places, and the people. Finally, when asked what is important for creating a good experience, a common response was ‘Slow down, take your time, stay away from the big attractions, stay orientated and stay safe’.
Conclusions

This research sought to add to the growing understanding and knowledge base about what the visitors want, need and how they perceive touring routes. Primarily this research set out to fill in some of the gaps in the research regarding users of touring routes including: awareness of touring routes; the degree to which they are ‘used’; the integration of routes within broader trip planning; and if a ‘touring route user’ exists as a definable market segment. In addition, whether visitors rate touring routes as attractions in their own right, or as means to reach destinations is unknown.

This research was able to shed some light on these important questions but the findings need to be examined in context. The sample itself was large enough to be significant but the data was not collected in a representative manner, nor was the sample size so large that it could be considered definitive. What has emerged is that either by location or timing, this research has a skew towards more experienced and repeat touring style travellers. The study also revealed that similarities did exist between the two groups of respondents in the different Australia states as both were seasoned travellers and usually regular drive tourists. Their motivation to take holidays was also similar as both had a desire to see Australia, rest and relax and explore.

Another similarity between the Tasmania and Queensland travellers was in regards to planning. Both groups of travellers tended to spend little time planning. In Queensland this may be due to the market being made up of more experienced travellers and their desire for a sense of freedom. In Tasmania, this is most likely due to the size of the destination. The qualitative data for Queensland travellers supported these findings suggesting the informal network including word of mouth, was very strong.

Differences in travellers between the states also appeared. Tasmanian respondents tended to be couples who were still working, so were constrained by time. Conversely, the Queensland respondents were an older demographic, were mostly retirees, and generally had smaller incomes. They tended to take longer trips and stay in camping style accommodation, thus, they appeared to be a subset of the seniors market, as previously explored by Horneman et al. (2002). The Queensland sample was also evidenced in the dominance of ‘pioneers’ and the lack of ‘big spenders’ and ‘indulgers’. This sub-segment of the market requires further examination to assess its overall size and whether it is a growing or declining segment of the overall drive market.

The Tasmanian and Queensland respondents also differed in their behaviour. Tasmanian travellers were far more destination oriented and described their style of travel as being travel to a main destination with touring afterwards. Conversely, Queensland respondents predominantly described their style of travel as touring, with no primary destination in mind: the qualitative research in Queensland suggested that this group of visitors may even shun the more popular routes.

In the area of ‘awareness’, respondents had a higher than expected awareness of the themed routes in both Tasmania and Queensland. While only a subset of the overall market, this is a positive sign for the concept of themed routes as marketing and packaging tools. However, the qualitative research provides a warning for those developing themed routes as dedicated route based travellers are sceptical of mainstream information and will avoid the ‘milkruns’ or heavily promoted routes. Supporting these results, use of touring routes in the market surveyed showed a preference for the less popular routes, especially in Queensland. The sample avoided the main routes like the Bruce Highway.

In Tasmania, the low recognition of the touring route being investigated (The Wild Way) and comparatively high recognition of other touring routes could be interpreted in several ways. Firstly, The Wild Way was no longer being financially supported, nor heavily promoted at the time of surveying, which may have affected recognition. Secondly the touring routes in Tasmania with the highest recognition (Huon Trail and Tamar Wine Route) had the name of their region within the name of the route. Whether the inclusion of the regions name in the touring route affected ‘recognition’ requires further exploration.

Despite the results regarding recognition, the research findings do not support the hypothesis of a ‘touring route user’. While many travellers were aware of the routes in both States and had travelled on other touring routes, the notion of touring underpinned by the freedom to go where you want, over-rides any route preference. That is, visitors in the qualitative research in Queensland expressed a preference for mixing and matching routes to get to the places and experiences they desired. Further, the results on what motivated people to travel on a particular route was dominated by functional reasons, with very few people choosing a route for its theme or story.

This research highlights that management and co-ordination issues are important aspects of the non-systemic improvement and the building of innovation along themed touring routes (Hardy et al. 2005). The results of this
study show that in both Tasmania and Queensland, respondents have a preference for adventure, freedom and roaming. Moreover the analysis revealed the importance of the ‘experience’ as well as the importance of understanding how people live. The Queensland group differs from the Tasmanian group by being at a more mature stage of their tourism life cycle (Pearce 1982) with a significant emphasis on self actualising behaviour; an observation that is consistent with Horneman’s (1999) analysis of the segmental change factors for the holiday preference groups identified in this study. Further, it has been proposed that the Tasmanian group have the characteristics of a group who could, with maturity and retirement, be recruited to the behaviour demonstrated by the Queensland group.

Finally, the discovery of a distinctive roaming route orientated group warrants further investigation. If this finding is confirmed it has implications for market growth in inland tourism.
APPENDIX A: EXAMPLE SURVEY INSTRUMENT - QUEENSLAND

CRC Touring Route Survey Questionnaire – Queensland, Charters Towers

Hello, my name is ................. and I am from the University of Queensland. We are doing a 15 minute survey to find out about the experiences of people who have driven from Greenvale, Townsville, Clermont or Hughenden.

Q1 Have you undertaken this trip? (Tick one only)

[ ] 1 Yes [ ] 2 No (Thank respondent for their time, no need to continue)

Would you be interested in participating in this survey? The information you give will be kept confidential and only used for the purpose of this research and in a collated (not individual form).

If no, thank you for your time and have a great day!

If yes, ..... OK Great! Before we begin I need to ask you a few questions to see if you are one of the people whose experiences we would like to find out about!

Q2 What is the main form of transport you are using? (Tick one only)

[ ] 1 Driving my own car
[ ] 2 Driving my own campervan or car with caravan
[ ] 3 Driving a hire car
[ ] 4 Driving a hire campervan or car with caravan
[ ] 5 Cycling (Thank respondent for their time, no need to continue)
[ ] 6 Motorbike
[ ] 7 On a coach tour (Thank respondent for their time, no need to continue)
[ ] 8 Public transport (Thank respondent for their time, no need to continue)
[ ] 9 Other (please specify and continue)

Q3 What is the main purpose of this trip? (Tick one only)

[ ] 1 Holiday, getting away, leisure, relaxation
[ ] 2 Visiting friends
[ ] 3 Visiting family
[ ] 4 Sport-spectating
[ ] 5 Going to a festival or major event
[ ] 6 Working holiday
[ ] 7 Live in local area (Thank respondent for their time, no need to continue)
[ ] 8 Business trip (Thank respondent for their time, no need to continue)
[ ] 9 Sport-participating (Thank respondent for their time, no need to continue)
[ ] 10 Conference, exhibitions, conventions, trade fairs (Thank respondent, no need to continue)
[ ] 11 Training and research (Thank respondent for their time, no need to continue)
[ ] 12 Education (Thank respondent for their time, no need to continue)
[ ] 13 Shopping (Thank respondent for their time, no need to continue)
[ ] 14 Personal appointment – but not health (Thank respondent, no need to continue)
[ ] 15 Health-related (Thank respondent for their time, no need to continue)
[ ] 16 Providing transport (Thank respondent for their time, no need to continue)
[ ] 17 Other (please specify) (Thank respondent for their time, no need to continue)
Users’ motivations, attitudes and behaviour in Queensland and Tasmanian

That’s great, we can continue! I again stress that your answers will be anonymous and confidential and if you decide you don’t want to participate anymore you can pull out at any time. If you are interested we can also give you more information on the results, so please let me know at the end and I will send you a summarised copy.

Are you still interested in proceeding?

If no, thank you for your time and have a great day!

If yes, OK let’s continue.

Q4 How would you describe your immediate travel party? *(Tick ✓ one only)*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐1</td>
<td>Travelling alone</td>
</tr>
<tr>
<td>☐2</td>
<td>An adult couple</td>
</tr>
<tr>
<td>☐3</td>
<td>A family group with children</td>
</tr>
<tr>
<td>☐4</td>
<td>Other family group and friends</td>
</tr>
<tr>
<td>☐5</td>
<td>Friends travelling together without children</td>
</tr>
<tr>
<td>☐6</td>
<td>Friends travelling together with children</td>
</tr>
<tr>
<td>☐7</td>
<td>Other (please specify)</td>
</tr>
</tbody>
</table>

Q5 Including yourself, how many of your travel party are

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 17 years old and under</td>
<td>b. 18 years old and over</td>
</tr>
</tbody>
</table>

Q6 How would you best describe this trip? *(Tick ✓ one only)*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐1</td>
<td>Driving straight to a main destination with no overnight stopovers in either direction except at the main destination</td>
</tr>
<tr>
<td>☐2</td>
<td>Driving straight to a main destination with overnight stopovers in either direction</td>
</tr>
<tr>
<td>☐3</td>
<td>Touring around spending a night or two in several places with no main destination</td>
</tr>
<tr>
<td>☐4</td>
<td>Touring around spending a night or two in several places with a main destination in which you spend a week or so</td>
</tr>
<tr>
<td>☐5</td>
<td>Driving to a main destination, then touring around spending a night in several locations</td>
</tr>
<tr>
<td>☐6</td>
<td>Other (please specify)</td>
</tr>
</tbody>
</table>

Q7 Excluding this visit, how many times have you undertaken a drive holiday of four nights or more in Queensland in the last three years?

Q8 How long do you expect your trip in Queensland to take in days?

Q9 What are the main types of accommodation have you used on this trip? *(Tick ✓ ✓ ✓ all relevant boxes)*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐1</td>
<td>Hotel, resort, motel, motor inn</td>
</tr>
<tr>
<td>☐2</td>
<td>Guest house, bed and breakfast</td>
</tr>
<tr>
<td>☐3</td>
<td>Rented house, apartment, flat or unit</td>
</tr>
<tr>
<td>☐4</td>
<td>Caravan park or commercial camp ground</td>
</tr>
<tr>
<td>☐5</td>
<td>Backpackers or hostel</td>
</tr>
<tr>
<td>☐6</td>
<td>Educational Institution (e.g. university, school dormitory, college)</td>
</tr>
<tr>
<td>☐7</td>
<td>Friends or relatives property</td>
</tr>
<tr>
<td>☐8</td>
<td>Own property</td>
</tr>
<tr>
<td>☐9</td>
<td>Free camping/caravanning</td>
</tr>
<tr>
<td>☐10</td>
<td>Other (please specify)</td>
</tr>
</tbody>
</table>
Q10 Please indicate on this map the place you started your entire trip or entered Queensland, the route you have travelled and where you intend to end your trip or leave Queensland? (Show map and record all route numbers and start and finish locations)

10a Route numbers and order of travel (Record order of travel by numbers in the boxes)

|------------------|-----------------|------------------|---------------------|-------------------|---------------------------|----------------|---------------------|-----------------------|----------------|----------------|---|---|---|

Q11 I will read statements relating to factors that may have motivated you to undertake this holiday. On a scale of 1 to 5, how would you rate them? (Tick ✓ for each statement)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Unimportant</th>
<th>Not important</th>
<th>Neutral</th>
<th>Important</th>
<th>Extremely important</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Always wanted to see Australia</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>b. To better understand my/Australia’s heritage</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>c. Escape from everyday life</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>d. Rest and relax</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>e. Socialise with family and friends</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>f. To be able to tell friends about our trip</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>g. Achieve an ambition</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>h. Change of routine and lifestyle</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>i. See specific places</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>j. Discover more about myself</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>k. Learn about a new area</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>l. Adventure/explore</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
<tr>
<td>m. Other (please specify)</td>
<td>☐ 1</td>
<td>☐ 2</td>
<td>☐ 3</td>
<td>☐ 4</td>
<td>☐ 5</td>
</tr>
</tbody>
</table>
Q12 How important are each of the following to you when choosing Queensland as a holiday destination?  
(Tick a number for each statement)

| a. Wildlife (plants and animals) | 1 | 2 | 3 | 4 | 5 |
| b. The outback landscape (scenery) | 1 | 2 | 3 | 4 | 5 |
| c. Aboriginal sites & culture | 1 | 2 | 3 | 4 | 5 |
| d. Other sites of cultural significance | 1 | 2 | 3 | 4 | 5 |
| e. Travelling routes with a story or theme to link places I want to see | 1 | 2 | 3 | 4 | 5 |
| f. Heritage buildings and structures | 1 | 2 | 3 | 4 | 5 |
| g. Learning about life in outback Queensland | 1 | 2 | 3 | 4 | 5 |
| h. Learning about places and things I encounter | 1 | 2 | 3 | 4 | 5 |
| i. Experiencing local food and wine | 1 | 2 | 3 | 4 | 5 |
| j. Travelling where I like, when I like | 1 | 2 | 3 | 4 | 5 |
| k. Budget constraints | 1 | 2 | 3 | 4 | 5 |
| l. Visiting museums | 1 | 2 | 3 | 4 | 5 |
| m. Time constraints | 1 | 2 | 3 | 4 | 5 |
| n. Other (please specify) | 1 | 2 | 3 | 4 | 5 |

We would now like to talk to you specifically about the route between ............ and ............... (We are interested in the Overlander’s Way and the Great Inland Way, so use the towns on these routes)

Q13 How long did you take (or plan to take) on the route between .................. and ..................?

Q14 Have you driven this route before? (Tick one only)

[ ] 1 Yes  [ ] 2 No

Q15 Why did you decide to use this route? (Tick ✓✓✓ all relevant boxes and complete no 7 if necessary)

[ ] 1 Only road between point of origin and destination  [ ] 5 Less traffic/quieter
[ ] 2 Most convenient route  [ ] 6 Better roads/highways
[ ] 3 Most scenic route  [ ] 7 Have done before and wanted to return, why?
[ ] 4 Have not used before/exploring  [ ] 8 Other (please specify)

Q16 Some people have heard of the Great Inland/Overlander’s Way and others have not. Have you? (Tick ✓ only) (Use whichever ‘Way’ they have used to get to Charters Towers)

[ ] 1 Yes  [ ] 2 No  GO TO QUESTION 19

Q17 How did you hear about it?

Q18 Did you use the Great Inland/Overlander’s Way promotional material when organising your trip? (Tick ✓ only) (Use the one they have used to get to Charters Towers)

[ ] 1 Yes  [ ] 2 No  [ ] 3 Have not seen any promotional material
Q19  Apart from the **Great Inland/Overlander’s Way**, Queensland has other self drive trails. Have you heard of any of them yet? Which ones? (*Tick ✓ for each statement*)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Savannah Way</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>B Overlander’s Way</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>C Outback Way</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>D Capricorn Highway</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>E Warrego Highway</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>g Matilda Way</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>h Great Inland Way</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>i Leichhardt Highway</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>j Country Way</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>k Bruce Highway</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>21</td>
<td>22</td>
</tr>
</tbody>
</table>

Q20  Have you ever used self drive trails in other states or countries? (*Tick ✓ one only*)

- [ ] Yes, please specify names and locations
- [ ] No

Q21  How are you navigating between ………. and ……….? (*Tick ✓ ✓ ✓ all that apply)*

- [ ] Own road map
- [ ] Touring route map
- [ ] Motoring club map
- [ ] Rental vehicle map
- [ ] Travel guide/book
- [ ] Touring route signs
- [ ] Local directional signs
- [ ] Brochure
- [ ] Internet map
- [ ] Know the route
- [ ] Other (please specify)

Q22  What time did you spend planning your trip between ………. and ……….? (*Tick ✓ one only*)

- [ ] Didn’t plan
- [ ] 1 day
- [ ] 2-6 days
- [ ] 1 -2 weeks
- [ ] 1 month
- [ ] 1 month – 3 months
- [ ] 3 months – 6 months
- [ ] 6 months or more

Q23  How much planning did you do for your trip between ………. and ……….? (*Tick ✓ one only*)

- [ ] Planned whole journey
- [ ] Mostly planned but with some flexibility
- [ ] Some planning but with lots of flexibility
- [ ] Other (please specify)

Q24  Which of the following sources of information did you use when planning your trip between ………. and ……….? (*Tick ✓ ✓ ✓ all that apply)*

- [ ] Motoring organisation (e.g. NRMA)
- [ ] Previous visit(s)/ prior personal knowledge
- [ ] Word of mouth
- [ ] Tourist visitor information network
- [ ] Travel guide/book
- [ ] Television/radio programs
- [ ] Telephone or written inquiry
- [ ] Travel agent
- [ ] State Travel Centre
- [ ] Roadside signs
- [ ] Journey brochures
- [ ] www.queensland-holidays.com.au
- [ ] Other website
- [ ] Road maps
- [ ] Newspaper/magazine article
- [ ] Tour operator
- [ ] Just found it
- [ ] Received no information before starting
- [ ] Other (please specify)
Q25  Which source of information did you find the most useful? (Circle in the table above)

Q26  Did you gain information en-route? (Tick ✔ one only)

[ ] 1 Yes  [ ] 2 No  GO TO QUESTION 30

Q27  Where did you get your en-route information from? (Tick ✔ ✔ all that apply and answer number one if necessary)

[ ] 1 Motoring organisation (e.g. NRMA)  [ ] 11 Journey brochures
[ ] 2 Previous visit(s)/ prior personal knowledge  [ ] 12 www.queensland-holidays.com.au
[ ] 3 Word of mouth  [ ] 13 Other website
[ ] 4 Tourist visitor information network  [ ] 14 Road maps
[ ] 5 Travel guide/book  [ ] 15 Newspaper/magazine article
[ ] 6 Television/radio programs  [ ] 16 Tour operator
[ ] 7 Telephone or written inquiry  [ ] 17 Just found it
[ ] 8 Travel agent  [ ] 18 Received no information before starting
[ ] 9 State Travel Centre  [ ] 19 Other (please specify)
[ ] 10 Roadside signs

Q28  Which source of information did you find the most useful? (Circle in the table above)

We would now like to ask you a little about your travel habits

Q29  How do you rate the following factors when deciding a drive holiday? (Tick ✔ for each factor)

<table>
<thead>
<tr>
<th>Unimportant</th>
<th>Not important</th>
<th>Neutral</th>
<th>Important</th>
<th>Extremely important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>□ 1</td>
<td>□ 2</td>
<td>□ 3</td>
<td>□ 4</td>
</tr>
<tr>
<td>Route</td>
<td>□ 1</td>
<td>□ 2</td>
<td>□ 3</td>
<td>□ 4</td>
</tr>
</tbody>
</table>

Q30  Which did you choose first when planning your trip?

[ ] 1 Destination  [ ] 2 Route

Q31  How many times have you taken the following type of holiday over the last 3 years? (Number all)

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>How many times?</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Touring holiday to different places</td>
<td></td>
</tr>
<tr>
<td>b. Driving to a main holiday destination</td>
<td></td>
</tr>
<tr>
<td>c. Fly/Drive packages</td>
<td></td>
</tr>
<tr>
<td>d. Flight and accommodation package</td>
<td></td>
</tr>
<tr>
<td>e. Flight to one major destination</td>
<td></td>
</tr>
<tr>
<td>f. Tour coach</td>
<td></td>
</tr>
<tr>
<td>g. Cruise ship</td>
<td></td>
</tr>
<tr>
<td>h. Other (please specify)</td>
<td></td>
</tr>
</tbody>
</table>

Q32  Which of the following statements best describes your usual type of holiday? (Tick ✔ one only)

[ ] 1 a reliable package tour which covers all the best spots
[ ] 2 an exclusive retreat with great local food and wine
[ ] 3 a place with real Aussie family environment
[ ] 4 a place which attracts the right ‘good time’ party crowd
[ ] 5 a place where you can take in the sights, dine in luxury and have first class entertainment
[ ] 6 a place where tourists rarely go, where you can pioneer new places, people and experiences
REGIONAL TOURING ROUTE TRAVELLERS

Finally, we would like to ask you a little about yourself….

Q33  Gender *(Interviewer to record)*

- [ ] 1  Male
- [ ] 2  Female

Q34  To standardise the results, would you tell me your age? *(Write age in appropriate box)*

- [ ] 18 - 24
- [ ] 25 - 34
- [ ] 35 - 44
- [ ] 45 - 54
- [ ] 55 - 64
- [ ] 65 or older

Q35  Where do you live?

- Postcode (Australia only)
- Country (Overseas only)

Q36  What is your marital status? *(Tick one only)*

- [ ] 1  Married/ de-facto with no children
- [ ] 2  Married/ de-facto with children
- [ ] 3  Single/never married/divorced/widowed with no children
- [ ] 4  Single/never married/divorced/widowed with children
- [ ] 5  Other *(please specify)*

Q37  Which of the following best describes your employment status? *(Tick one only)*

- [ ] 1  Unemployed
- [ ] 2  Home duties
- [ ] 3  Student
- [ ] 4  Employed, part time (less than 18hrs a week)
- [ ] 5  Employed, full time (more than 18hrs per week)
- [ ] 6  Retired
- [ ] 7  Other *(please specify)*
- [ ] 8  Refused

Q38  Which bracket best describes your household’s combined annual income before tax, including pensions and allowances from all sources? *(Tick one only, if overseas get the respondent to estimate in AUS)*

- [ ] 1  $1,000 - $4,199
- [ ] 2  $4,200 - $8,299
- [ ] 3  $8,300 - $15,599
- [ ] 4  $15,600 - $25,999
- [ ] 5  $26,000 - $36,399
- [ ] 6  $36,400 - $51,999
- [ ] 7  $52,000 - $77,999
- [ ] 8  $78,000 - $103,999
- [ ] 9  $104,000 - $129,999
- [ ] 10  $130,000 +
- [ ] 11  Don’t know
- [ ] 12  Do not wish to answer this question

Q39  Do you have any additional comments you would like to add?

We plan to conduct focus groups in Sydney, Melbourne and Brisbane to talk about your holiday experience in more detail. In return for an hour of your time we will give you a financial contribution for your time and travel as well as food and drink. Would you be interested in participating in a focus group?

- [ ] 1  Yes
- [ ] 2  No

If yes can you give us a telephone number or Email address on which we can contact you regarding the focus groups?

- Name
- Email address or phone number
Also, would you like the results of this survey sent to you?

☐ 1 Yes  ☐ 2 No

Name

Email address or phone number

These contact details will only be used for the purpose of contacting you and will be destroyed when this study is complete, they will never be divulged to another person or organisation.

Thank you for assisting us in our work. Here is an information sheet with more details on this study and please don’t hesitate to call us if you need more information or have any questions.

Time:

Date:

Location: Charters Towers  Specific location:

Interviewer:
APPENDIX B: IN-DEPTH PHONE INTERVIEW SCHEDULE

Interview Running Sheet
Queensland Journeys Survey October 2003

Informant number. Name
Date Time Phone Number
Interviewer

Interview guide

Firstly, when we interviewed you, you were on one of Queensland’s themed routes.
☐ Explain, if needed, the Matilda Highway or Great Inland Way

1. Briefly, what do you understand a themed route to be?

2. Can you recall any of the ways the route was identified or promoted on route? ☐ Yes ☐ No
☐ Check ☐ Road signage, ☐ in information centres, ☐ in brochures, ☐ on maps ☐ pre-trip

3. Were there any special reasons for choosing the route you undertook? ☐ Yes ☐ No
☐ Check. Importance of themed route as part of the drive holiday experience? ☐ Yes ☐ No
☐ Check. Importance of freedom (clarify resistance to themed route e.g. structure)

4. Now thinking back to planning your journey; What would you like to know about a route before you leave home and what do you want to discover for yourself along the way?
☐ Check: Information about services, infrastructure or stories about places / sites / history /biota)
☐ Check: In the survey, many people said they didn’t plan, what does this mean to you
☐ info gathering ☐ booking ahead ☐ target destination only

5. What role did the themed routes play in your decisions?
☐ Check Attractiveness of following a theme or story e.g. history, landscape
☐ Check: Media preference for receiving story (road signs, books etc)

6. Now thinking back to your journey, when you were travelling, what aspects of the trip did you discuss:
☐ Check: with partner travelling companion
☐ Check: with others

7. What thoughts come to mind when I say the following words
Prompt: ‘Importance’, good and bad, if necessary

7a Places/attractions
Check: ☐ Importance of the turning point/ destination
Check: ☐ a. Importance of taking a different route home ☐ b. impediments to this if desired?

7b Travel experiences
Check: ☐ a. Things you saw ☐ b. Things you did

7c People
Check: ☐ The importance of sharing

7d Surprises
7e. Improving the journey
Check: ☐ Things missing
Check: ☐ Problems

8. Now you have returned, What do you tell others about the journey?

9. If you were organising another touring holiday or advising someone about one, what would you suggest is important for creating good experiences?
Check: ☐ Would you recommend following themed routes?

10. Many people surveyed were experienced road travellers, what has or what would encourage you to travel the same route again?
Check: ☐ Preference for untravelled routes e.g. non Qld
Check: ☐ What would Qld have to do to get you back?

11. Any other comments?

Thank you for your help; it is much appreciated
REFERENCES


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AUTHORS

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Mark Olsen
Mark Olsen is the Manager, Market Development at Tourism Queensland working with the touring drive market among other emerging markets. Over the past five years Mark's work has included research and development projects for the touring drive market including the very successful Drive Tourism Program in Queensland further developing a suite of themed drive routes including the Matilda Highway, Overlanders Way and Savannah Way. Mark has also been involved in market leading research projects on visitor flow modelling, market segmentation, and the tools used by the touring drive market to plan their holidays. Email: Mark.Olsen@tq.com.au
The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program. STCRC is the world’s leading scientific institution delivering research to support the sustainability of travel and tourism - one of the world’s largest and fastest growing industries.

Research Programs

Tourism is a dynamic industry comprising many sectors from accommodation to hospitality, transportation to retail and many more. STCRC’s research program addresses the challenges faced by small and large operators, tourism destinations and natural resource managers.

Areas of Research Expertise: Research teams in five discipline areas - modelling, environmental science, engineering & architecture, information & communication technology and tourism management, focus on three research programs:

- **Sustainable Resources**: Natural and cultural heritage sites serve as a foundation for tourism in Australia. These sites exist in rural and remote Australia and are environmentally sensitive requiring specialist infrastructure, technologies and management.

- **Sustainable Enterprises**: Enterprises that adhere to best practices, innovate, and harness the latest technologies will be more likely to prosper.

- **Sustainable Destinations**: Infrastructural, economic, social and environmental aspects of tourism development are examined simultaneously.

Education

- **Postgraduate Students**: STCRC’s Education Program recruits high quality postgraduate students and provides scholarships, capacity building, research training and professional development opportunities.

- **THE-ICE**: Promotes excellence in Australian Tourism and Hospitality Education and facilitates its export to international markets.

Extension & Commercialisation

STCRC uses its research network, spin-off companies and partnerships to extend knowledge and deliver innovation to the tourism industry. STCRC endeavours to secure investment in the development of its research into new services, technologies and commercial operations.

Australia’s CRC Program

The Cooperative Research Centres (CRC) Program brings together researchers and research users. The program maximises the benefits of research through an enhanced process of utilisation, commercialisation and technology transfer. It also has a strong education component producing graduates with skills relevant to industry needs.