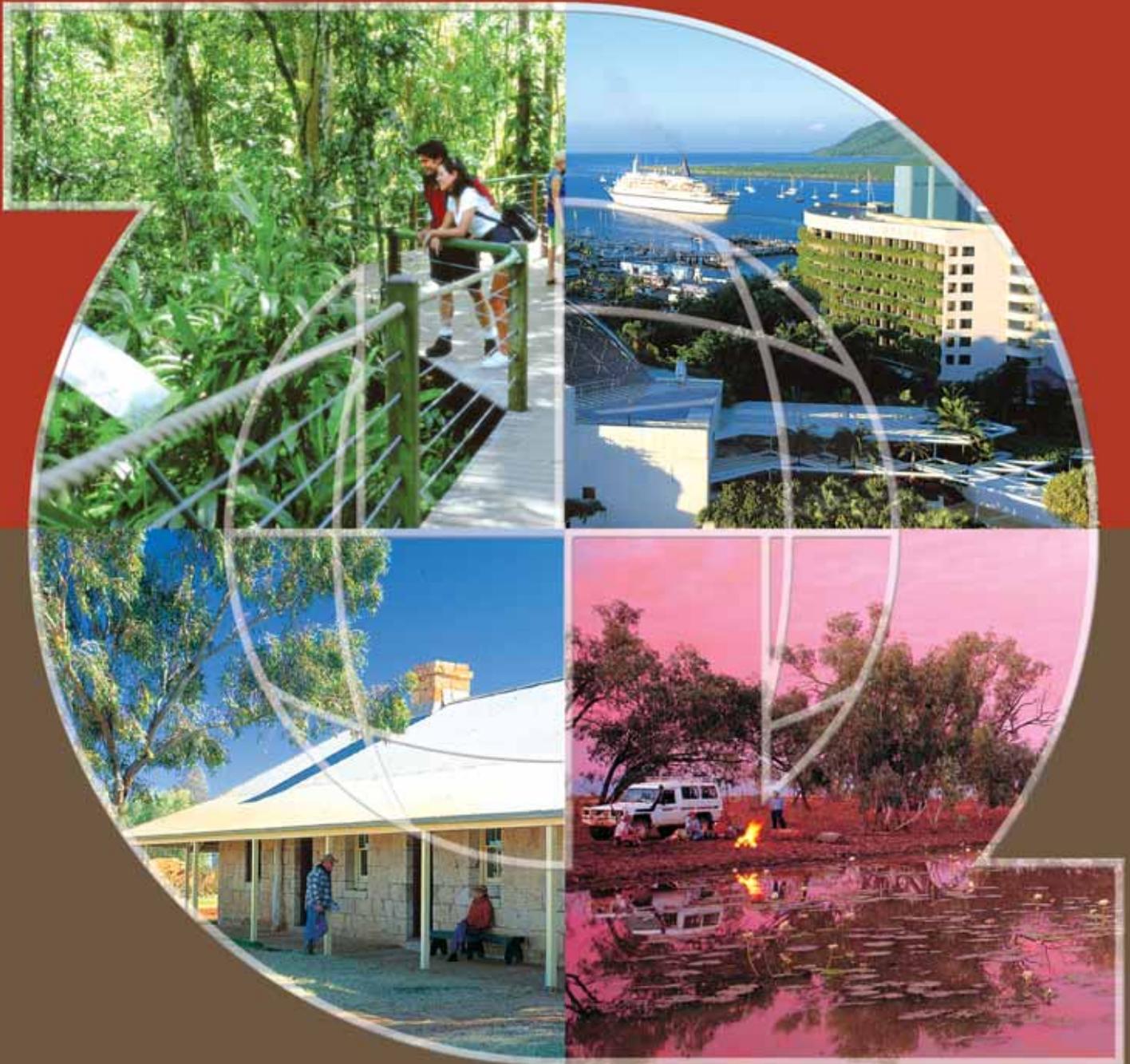


SELF-DRIVE TOURISM

travellers to South Australia's Limestone Coast region



Gary Howat, Graham Brown and Heather March

SUSTAINABLE
TOURISM



CRC

Technical Reports

The technical report series present data and its analysis, meta-studies and conceptual studies, and are considered to be of value to industry, government and researchers. Unlike the Sustainable Tourism Cooperative Research Centre's Monograph series, these reports have not been subjected to an external peer review process. As such, the scientific accuracy and merit of the research reported here is the responsibility of the authors, who should be contacted for clarification of any content. Author contact details are at the back of this report.

Editors

Prof Chris Cooper
Prof Terry De Lacy
Prof Leo Jago

University of Queensland
Sustainable Tourism CRC
Sustainable Tourism CRC

Editor-in-Chief
Chief Executive
Director of Research

National Library of Australia Cataloguing-in-Publication

Howat, Gary.
Self-drive tourism: travellers to South Australia's Limestone Coast region.

Bibliography.
ISBN 9781920965150.

1. Tourism – South-East, South Australia. 2. Automobile travel – South-East, South Australia. I. Brown, Graham. II. March, Heather. III. Cooperative Research Centre for Sustainable Tourism. IV. Title.

338.47919423

Copyright © CRC for Sustainable Tourism Pty Ltd 2007

All rights reserved. Apart from fair dealing for the purposes of study, research, criticism or review as permitted under the Copyright Act, no part of this book may be reproduced by any process without written permission from the publisher. Any enquiries should be directed to General Manager Communications & Industry Extension [brad@crctourism.com.au] or Publishing Manager [trish@crctourism.com.au].

Acknowledgements

The Sustainable Tourism Cooperative Research Centre, an Australian Government initiative, funded this research.

The authors would like to express their thanks to tourism industry groups who helped facilitate this project. In particular, we would like to acknowledge the managers of the Visitor Information Centres in South Australia's Limestone Coast region for their support in collecting data and providing feedback on the surveying process from the outset. Valued inputs into the questionnaire were offered by South Australian Tourism Commission staff (Director of Research, Richard Trembath and colleagues) and marketing staff at SeaLink (Julie-Anne Briscoe and Paul Victory).

Thank you also to the travellers who took the time to respond to the questionnaire. Their combined comments and evaluations formed the core of the project and the richness of the data is a result of their apparently well-considered responses.

CONTENTS

SUMMARY	V
CHAPTER 1 OVERVIEW OF THE STUDY	1
BACKGROUND	1
CHAPTER 2 RESULTS AND DISCUSSION	3
RESPONDENT CHARACTERISTICS	3
PERCEPTIONS OF THE TRIP	5
<i>Summary and implications for stakeholders</i>	6
PERSONAL BENEFITS OF THE TRIP	7
<i>Summary and implications for stakeholders</i>	8
IMPORTANCE AND SATISFACTION WITH DRIVE ROUTE FEATURES	9
<i>Summary and implications for stakeholders</i>	11
CHAPTER 3 SUMMARY OF WRITTEN RESPONSES	13
ASPECTS OF THE TRIP THAT RESPONDENTS ENJOYED THE MOST	13
PROBLEMS THAT DETRACTED FROM THE TRIP	17
SPECIAL ASPECTS OF THE TRIP THAT MADE THE EXPERIENCE UNIQUE	19
CHAPTER 4 CONCLUSIONS AND RECOMMENDATIONS	22
APPENDIX A: FREQUENCY OF SELF-DRIVE TRIPS	23
APPENDIX B: FACTOR ANALYSIS	24
APPENDIX C: CLUSTER ANALYSIS	25
REFERENCES	27
AUTHORS	29

LIST OF TABLES

Table 1: Age groups _____	3
Table 2: Occupation _____	3
Table 3: Gender _____	4
Table 4: Place of residence _____	4
Table 5: Travel group _____	4
Table 6: Driving role _____	4
Table 7: One word to describe respondents' overall experience of the trip _____	5
Table 8: Likelihood of making another self-drive trip to South Australia in the foreseeable future _____	5
Table 9: Willingness to recommend this specific trip to others _____	6
Table 10: Overall satisfaction with the Limestone Coast trip _____	6
Table 11: Perceived benefits to respondents – Survey A _____	7
Table 12: Perceived benefits to respondents – Survey B and C _____	8
Table 13: Importance and satisfaction with drive route features – Survey A _____	9
Table 14: Importance and satisfaction with drive route features – Surveys B and C _____	10
Table 15: Importance and satisfaction with drive route features by state – Surveys B and C _____	10
Table 16: Importance and satisfaction with drive route features by selected occupation categories – Surveys B and C _____	11
Table 17: Aspects of the trip that respondents enjoyed the most – Survey A _____	13
Table 18: Aspects of the trip that respondents enjoyed the most – Survey B _____	15
Table 19: Aspects of the trip that respondents enjoyed the most – Survey C _____	16
Table 20: Problems recorded by respondents that detracted from this trip – Survey A _____	17
Table 21: Problems recorded by respondents that detracted from this trip – Survey B _____	17
Table 22: Problems recorded by respondents that detracted from this trip – Survey C _____	18
Table 23: Was there anything special about the Limestone Coast section of your trip to South Australia that made your experience unique? – Survey B _____	19
Table 24: Was there anything special about the Limestone Coast section of your trip to South Australia that made your experience unique? – Survey C _____	20

SUMMARY

Objectives of Study

The objectives of this study were to:

- Generate a reliable and valid instrument to evaluate visitor satisfaction with self-drive tourism;
- Evaluate alternative methods to survey self-drive tourists;
- Provide information about the attributes that influence satisfaction levels of self-drive tourists;
- Provide information about the benefits sought and attained by self-drive tourists; and
- Provide information to assist product development and marketing initiatives related to self-drive tourism.

The pilot study (Survey A) included the design and trialling of a questionnaire to examine satisfaction with drive tourism. Feedback from this pilot study informed adaptations to a questionnaire that was distributed to a larger sample of self-drive tourists (Surveys B and C).

Methodology

The instrument

The draft questionnaire was designed following reference to the literature and consultation with South Australian Tourism Commission (Director of Research, Richard Trembath and colleagues), marketing staff at SeaLink and a panel of academic researchers with experience in customer satisfaction research and self-drive tourism ($n = 8$). The questionnaire consisted of five sections: (1) basic demographic data; (2) questions on respondents' travel behaviour relevant to the self-drive trip being reviewed; (3) employing a disconfirmation approach (Oliver 1997) importance and satisfaction ratings of key features of the self-drive trip being reviewed; (4) benefits sought/achieved from the self-drive trip being reviewed; and (5) measures of overall satisfaction and behavioural intentions (willingness to recommend and intention to revisit).

The sample

Survey A

Questionnaires were mailed (November 2005) to a sample of recent self-drive travellers to South Australia from a database supplied by Sealink. Completion and return of the questionnaire, via self-addressed return post, was encouraged by entering the respondents' names in a draw for a major prize. Confidentiality was maintained by enclosing a separate envelope to return this information to the researchers. While 167 questionnaires were distributed, only travellers who had travelled on either of two designated Limestone Coast drive routes were invited to complete the questionnaire. Of the 60 questionnaires returned, 47 were complete and from relevant respondents. The response rate of 28% falls within the acceptable response rate of 20% to 40% for mail surveys of consumers.

The relatively small sample ($n=47$) requires that results reported for this pilot study to be interpreted with caution. The focus of the questionnaire was intended to be on one of two designated Limestone Coast drive routes (the coastal and inland routes between Mt Gambier and Tailem Bend). Respondents listed the towns where they stayed overnight and this provided a check of their travel route. However, many of the respondents also visited other destinations in South Australia (especially Kangaroo Island) and it is likely that this may have influenced their responses. A recommendation for the new questionnaire was to restate the specific drive route more frequently throughout the questionnaire. Additionally, two items were added to the list of benefits and one item added to the list of features of the self-drive trip being reviewed.

Survey B

A second sample was identified from people who responded to post cards distributed from December 2005 to April 2006 through visitor information centres (VICs) and major accommodation providers (e.g. selected caravan parks) located on the two major Limestone Coast drive routes. Of the 1430 postcards sent to the distribution points, 56 were returned with requests from 126 recent travellers to the Limestone Coast for questionnaires to be mailed to them. Of these, 75 completed questionnaires were returned, representing a response rate of 60% of the questionnaires mailed out. In an attempt to ensure minimal imposition on VIC staff, refusal rates to receive post cards were not recorded. However, use of this methodology appears to be better suited to onsite distribution of post cards to prospective respondents by designated researchers who can briefly explain the research.

Survey C

Following discussion with VIC staff, a third method was trialled whereby questionnaires were distributed directly from the VICs. In March 2006, 150 questionnaires and reply paid envelopes were sent to six VICs (total of 900 questionnaires). VIC staff were asked to distribute these until the end of the Easter weekend (17 April).

Of the 767 questionnaires that were distributed, 76 completed questionnaires were returned, indicating a response rate of 10% of the total number of questionnaires sent to VICs for distribution. However, as in the previous method, refusal rates to complete a questionnaire were not recorded.

Future distribution of questionnaires using this methodology could employ incentives to VIC staff to record refusal rates, and for the questionnaires to be distributed only during specified time periods (e.g. a schedule of days to capture a more random spread of visitors over different seasons and during designated holidays compared to non-holiday periods).

Key Findings

An evaluation of alternative methods to survey self-drive tourists indicated that access to a database of self-drive tourists (Survey A) yielded the highest respondent return rates and was the most cost-effective of the three data collection methods. The other two methods relied on VIC staff and/or accommodation providers to distribute postcards (Survey B) or questionnaires to prospective respondents to post back on completion (Survey C). A fourth data collection method, onsite administration of the questionnaire by researchers, will be used in an extension to this research during the October 2006 – July 2007 period.

Information about the attributes that influence satisfaction levels of self-drive tourists indicated that 'Accommodation' was the most important feature and rated highest for satisfaction for respondents from Survey A. 'The quality of the roads' and 'Road signage to towns' also rated relatively high for importance and recorded similar satisfaction ratings. Analysis of the data from the other surveys, using stepwise regression, indicated a close link between satisfaction with 'Accommodation' and 'Overall satisfaction' with the Limestone Coast section of the drive route. However, 'Visitor information centres' recorded the highest satisfaction ratings for these respondents. Queensland respondents recorded the greatest concerns for 'Road signage to attractions', and 'Road signage to towns' while New South Wales / Australian Capital Territory respondents were most concerned with 'Facilities at rest stops'.

Information about the benefits sought and achieved that influence satisfaction levels of self-drive tourists indicated that 'Enjoying the scenery' was the highest rated benefit in terms of its importance as well as the extent to which it was achieved for respondents from all three surveys. Additionally, stepwise regression analysis indicated a close link between the benefit attained for 'Enjoying the scenery' and 'Overall satisfaction' with the drive route. Respondents whose occupation category was 'Professional' rated 'Relaxation' and 'Enjoying time with family and/or friends' significantly higher than the 'Retired' category.

Information to assist product development and marketing initiatives related to self-drive tourism can be gleaned from data relevant to the importance of features and benefits, and the levels of satisfaction (for features) or achievement (of benefits). Furthermore, the written comments from respondents highlight special aspects that were either particularly enjoyable or a problem. Such marketing information should be considered in the context of the research sample characteristics. Cluster analysis for data from Surveys B and C based on input variables (e.g. age, occupation, travel group, type of accommodation, and home state) produced a three cluster solution (Appendix C). One cluster, 'Mature couples' (mainly retired couples), placed a high priority on features such as tourist services ('Available tourist information en route', 'Visitor information centres' and 'Places of interest to stop en route') and basic services ('Access to services', 'Accommodation' and 'Facilities at rest stops'). The main benefits sought by this cluster included: 'What tourists can see, do and experience' ('Enjoying the scenery', 'Discovering and exploring new places', 'Visiting interesting towns and attractions', 'Experiencing nature and the natural environment', 'Freedom to change plans en route' and 'Enjoying local history and culture'). In contrast, a second cluster, 'Relaxing with family' (mainly 30-39-year-old respondents from South Australia and Victoria), recorded high ratings for both importance and achievement of benefits for 'Family relaxation' ('Enjoying time with family and/or friends' and 'Relaxation').

Future Action

Recommendations for future action include:

1. Future self-drive tourism research should consider alternative data collection methods to maximise the representativeness of samples. Inadequate samples will fail to provide valid, actionable information for industry to confidently use for marketing and decision-making.
2. Extending this research in the future could provide more detailed information about the psychology and motivations of drive travellers, and more data on the planning that travellers undertook prior to their trip.
3. Stakeholders (e.g. state tourism commissions, local government, and tourism operators) could consider the findings of this study in their future product development and marketing.

Chapter 1

OVERVIEW OF THE STUDY

Background

Self-drive tourism in Australia is a significant activity, which involves in excess of 53 million holidays taken in Australia every year (Bureau of Tourism Research 2000), including 70% of all holiday trips in Australia by Australians. The number of drive tourists in South Australia increased 12.7% (or 508,000) during 1998-2000, thus supporting the significance of this form of tourism (Olsen 2003; Sivijis 2003). While drive tourism to South Australia in 1998-2000 involved 3.991 million tourists, the adjoining states of Victoria and New South Wales generated 13.154 million and 18.398 million drive tourists respectively (Bureau of Tourism Research 2000).

However, while over 80% of domestic tourists arrive at their destinations by car, there has been a relative dearth of research on drive tourism in Australia (Carson, Waller & Scott 2002). It appears that until recently most self-drive tourism research has been in the form of case studies focusing on specific drive routes with little quantified data to allow for external comparisons (Prideaux & Carson 2003). Olsen (2002, p.16) suggested that there is a special need for research into self-drive tourism that provides time-series analyses across a range of sectors “to gain a big picture or ‘strategic’ view of a market”. Carson, Waller and Scott (2002, p.2) identified a major issue as “understanding the characteristics of self-drive tourists and the nature of visitor flows is central to the sustainable development of tourism in many destinations, and for the success of many tourism products”. The economies of regional regions in particular are increasingly becoming dependent on tourism (Laws & Scott 2003).

A proposed framework to increase comparative drive tourism research includes visitor characteristics (e.g. number, length of stay, spending, market segments, age and income) as well as specific features of the drive route including physical infrastructure (e.g. roads, communications, accommodation, vehicle repair and shopping), accommodation (e.g. caravan parks, motels hotels and bed and breakfast) and attractions (e.g. natural/built and heritage/cultural) (Prideaux & Carson 2003). Many of these features were included in a list of the components of drive tourism (Hardy 2003) that include: the road, accommodation, information (e.g. visitor centres, signage and brochures), refuelling and roadside services (e.g. food and retail outlets), enforcement of traffic regulations, vehicle repairs and recovery, attractions that target drive tourists and promotion of on-road attractions. An American Association of State Highway and Transportation Officials (2000) report noted that enjoyment of leisure travel by car was negatively impacted on by the amount of traffic, behaviour of other drivers and boredom (Sivijis 2003).

The National Centre for Tourism (NCT) (cited in Hardy 2003) emphasised visitors’ needs in a model that identified the key features for successful themed drive routes. These features included: unique experiences or distinctive attractions (e.g. landscapes, vistas, scenery and heritage features); quality roads, clear directional and tourist signage, service infrastructure (e.g. rest areas, scenic lookouts and camping areas), information services (e.g. information centres) and tours and visitor services convenient for travellers. In a case study examination of two iconic touring routes in the United States, factors that contributed to a quality visitor experience included the key component of the experience, the ‘attraction’, or what tourists “can see, do and experience” (Hardy 2003, p.325). In themed touring routes, high-quality interpretation of the attractions was important to inform and educate visitors by providing themes, meanings and relationships.

A major motivator for self-drive tourism is the relative independence and autonomy it affords travellers (Trimble 1999) and the freedom to change the itinerary en route (Olsen 2003; Prideaux & Carson 2003), the opportunity for ‘real’ experiences (Taylor, Nelson & Sofres 2001) as well as its relatively low cost compared to other alternatives (Taylor, Nelson & Sofres 2001; Parfitt 1997). The importance of freedom and independence for the self-drive traveller is supported by other research (e.g. Yann, Campbell, Hoare & Wheeler 1999) that indicated a majority of self-drive travellers seek information about local attractions while en route (Olsen 2003) and rely heavily on adequate road signage and visitor information centres (VICs) (Taylor, Nelson & Sofres 1999) to provide details of authentic ‘local’ experiences (including local ‘secrets’). As a result, the length of stay in a particular region is often increased significantly, to the extent that 40% of self-drive travellers will consequently to change their original planned route. The pre-planning phase of the recreation experience tends to be important for drive tourists, especially for the over 50s market (Hardy 2003; Olsen 2002). Satisfaction with the overall journey is linked to pre-planning information and appropriate road signage that increases the number of attractions visited (Hardy 2003; Olsen 2002).

Research on leisure travel by car in the United States (American Association of State Highway and Transportation Officials cited in Sivijis 2003, p.343) indicated a trend toward increased participation “with age,

education, employment status and income". Lifestyle as a segmentation characteristic is highlighted by the growing number of older travellers with time flexibility as well as financial resources (Hardy 2003).

Within the Australian drive market, a number of market segments have been identified. Research in Queensland identified four segments based on the length of the trip: the short break (one to three nights), short tours (four to seven nights), the big tour (eight to 21 nights), and the grand tour (22+ nights) (Olsen 2003; Sivijs 2003). Other Queensland research focussed on travel behaviour as the basis for identifying three major segments (Hardy 2003; Yann, Campbell, Hoare & Wheeler 1999): the 'touring segment' (those who stopped where they pleased, composed mainly of older adults); the 'A to B with stops segment' (those who break their journey for short periods, and including young couples and families with young children); and the 'A to B segment' (those who drive to their destination without stopping, especially young singles and families with school age children).

Identification of market segments could also be strengthened by research that includes customer needs and motivations and benefits sought by specific target markets, which helps explain the reasons (satisfactions sought) why consumers support a specific service (Ahmad 2003; Minhas & Jacobs 1996; Haley 1995). Haley (1995) notes that the configuration of benefits sought is likely to differentiate one consumer segment from another. By clustering consumers into groups based on personal characteristics and then exploring the potential relationships between these clusters and categories of benefits sought, Ahmad (2003) suggests the link between personal characteristics and buying behaviours is mediated by benefits sought.

Appropriate research would provide information to allow stakeholders, such as regional tourism businesses, local government, and state government, to adjust services relevant to the drive tourism experience. This should lead to improvements to relevant products and services (e.g. rest stops, road signage, accommodation and quality of roads). Self-drive tourists would then benefit from informed changes that better reflect their needs.

The importance of these issues has been acknowledged by the CRC for Sustainable Tourism. It has identified tourist satisfaction as a priority area of research and has funded studies to examine destination satisfaction, satisfaction with tourist enterprises and satisfaction with self-drive tourism. The self-drive initiative responded to requests from industry representatives in South Australia, where it was decided to develop and test techniques to measure relevant attributes (features) of the self-drive experience. Drive routes in the Limestone Coast area were selected as the settings for the initial research where data collection methods, suitable for application on drive routes in other parts of the country, were tested as part of this study.

Chapter 2

RESULTS AND DISCUSSION**Respondent Characteristics**

The respondent profiles for the three survey methods (Surveys A, B and C) differed in several ways. The relatively older respondents in Survey C (Table 1) and more retired respondents in Surveys B and C (Table 2) tended to stay longer in the region and made a greater use of caravan parks. All of the Survey A respondents were from New South Wales or Victoria (Table 4). Survey B respondents were mainly from South Australia and Victoria, while similar numbers of Survey C respondents came from South Australia, Victoria, New South Wales and Queensland. Survey A respondents had booked part of their journey (e.g. accommodation and Kangaroo Island ferry) through SeaLink, and completed their travel during the past 12 months. Survey B respondents completed their journey between December 2005 and April 2006 and, like Survey A travel groups, about a third included family members (Table 5). In contrast, Survey C respondents were mainly retired people (Table 2) who completed their journey between March and April 2006.

The majority of respondents were in the 40 years and over age groups (86%) (Table 1). Survey C included more 60 years and over respondents (52%) and fewer in the 40-49 years age group (4%).

Table 1: Age groups

Age	Survey A % N = 47	Survey B % N = 75	Survey C % N = 76	Total % N = 198
Under 20 years	0	3	1	2
20-29 years	2	4	1	2
30-39 years	9	9	11	10
40-49 years	22	21	4	15
50-59 years	39	41	30	37
60-69 years	24	19	43	29
70 years and over	4	3	9	5

Survey C respondents were mainly retired (66%) compared to the other two respondent groups (Surveys A and B) whose occupation categories included: Professional (49% and 44% respectively); Clerical, services, sales, public servant (15% and 12% respectively); and Retired (18% and 28% respectively) (Table 2).

Table 2: Occupation

Occupation	Survey A %	Survey B %	Survey C %	Total %
Professional	49	44	14	36
Clerical, services, sales, public servant	15	12	11	12
Manager, supervisor	9	9	3	7
Trade person	6	6	1	5
Retired	18	28	66	37
Home duties	3	3	5	4

There were more female respondents for each of the surveys (Table 3), increasing from Survey A (55%) to Survey B (63%) and Survey C (72%).

Table 3: Gender

	Survey A %	Survey B %	Survey C %	Total %
Females	55	63	72	64
Males	46	37	28	36

The home state for Survey A respondents was either Victoria (56%) or New South Wales (44%) (Table 4). In contrast, Survey B respondents were mainly from South Australia (48%) and Victoria (39%). Similar numbers of Survey C respondents came from South Australia (28%), Victoria (22%), New South Wales (19%) and Queensland (20%). There were very few overseas respondents overall (2%).

Table 4: Place of residence

Place of residence	Survey A %	Survey B %	Survey C %	Total %
Victoria	56	39	22	37
New South Wales / Australian Capital Territory	44	6	19	20
South Australia	0	48	28	29
Queensland	0	5	20	9
Western Australia	0	0	7	2
Tasmania	0	0	1	0
Overseas	0	2	3	2

The travel groups consisted of the driver and a partner (62%), family members (26%), friends (5%), and 'other' (6%) (Table 5). Survey C respondents included fewer family groups with more 'Driver and partner' combinations, thus reflecting the greater number of retired people in this sample (Table 2).

Table 5: Travel group

Group type	Survey A %	Survey B %	Survey C %	Total %
Driver and a partner	59	55	72	62
Family members	33	32	16	26
Friends	4	7	5	5
Other	4	7	6	6

Almost two-thirds (63%) of the Survey A respondents shared the driving role (Table 6). In contrast, this dropped for Survey B respondents (45%) and to only 33% for Survey C respondents. There was a concomitant increase in the numbers who were the sole driver across the three data collections (24%, 27% and 36% respectively). Respondents who were the sole driver may have had a more limited opportunity to view the surrounding features of the drive trip compared to those who were passengers. Furthermore, while only 11% of Survey A respondents towed a caravan, this was higher for the other two groups (37%). Almost half (49%) of the 'Retired' respondents in Surveys B and C towed a caravan.

Table 6: Driving role

Driving Role	Survey A %	Survey B %	Survey C %	Total %
Shared the driving role	63	45	33	46
Sole driver	24	27	36	29
Passenger the whole time	13	28	32	25

Almost three-quarters (72%) of the Survey A respondents stopped overnight for at least one night between Mt Gambier and Tailem Bend. The most popular stopovers included Robe (26%), Mt Gambier (22%) and Meningie (13%). The majority of stopovers (79%) were for one night. The major accommodation was motel/motor inn (48%) and caravan park (40%). About a third of these respondents included family groups and many were en route to other destinations such as Kangaroo Island and Adelaide, from their homes in either New South Wales or Victoria.

Almost all respondents from Surveys B and C stopped overnight for at least one night between Mt Gambier and Tailem Bend. Two-thirds (66%) stopped overnight for at least two nights and 45% for three or more nights. Caravan parks accounted for a majority of the accommodation (60%), with smaller numbers staying at motels or motor inns (14%). Robe (43%) was the most popular destination for the first night stopover, followed by Mt Gambier (16%).

It appears that the majority of respondents are relatively frequent self-drive travellers, with over half undertaking at least three trips in other states in the last three years (Appendix A).

Perceptions of the Trip

In this section, data for Surveys B and C, which used identical questionnaires, have been combined, except where significant differences exist between the two respondent groups.

The respondents' overall experiences of the trip were mainly described in terms denoting a high level of feeling such as 'wonderful' and 'breathtaking' (36%), and 'fulfilling' and 'enjoyable' (33%); to more composed responses such as 'interesting' (13%) and 'relaxing' (14%) (Table 7). Survey B respondents reflected a higher number for whom 'relaxation' was a major outcome. These results are supported by the respondents' written comments that highlighted aspects of the trip that made the experience unique (Tables 23 and 24).

Table 7: One word to describe respondents' overall experience of the trip

Descriptor	Survey A %	Survey B %	Survey C %	Total %
Fantastic, perfect, wonderful, great, excellent, impressive, spectacular, breathtaking, or adventure	42	37	30	36
Satisfying, fulfilling, enjoyable, pleasant, or good	38	23	39	33
Interesting or variety	9	14	14	13
Relaxing	9	21	14	14
Windy, hot, uninteresting (negative)	0	6	3	4

Over two-thirds of the Survey A respondents (67%) indicated that they would definitely or probably make another self-drive trip to South Australia in the foreseeable future (Table 8) and most (95%) would recommend a similar trip to others (Table 9).

Table 8: Likelihood of making another self-drive trip to South Australia in the foreseeable future

Likelihood	Survey A (n = 47)	Survey B + C (n =149)	Total (n=196)
	%	%	%
Definitely would	26	55	46
Probably would	41	30	34
Unsure	24	13	16
Probably wouldn't	9	2	4
Definitely wouldn't	0	0	0

The lower percentage likely to make a similar trip (67%) compared to their willingness to recommend the trip to others (95%) is possibly influenced by the costs (time, travel and accommodation) to come from New South Wales or Victoria. However, there may be potential for South Australia to tap into more of the drive tourist market enjoyed by Victoria and New South Wales which generated 13.154 million and 18.398 million drive tourists respectively in 1998-2000, compared to 3.991 million in South Australia. In contrast, more respondents from Surveys B and C (85%) indicated that they were likely to make another self-drive trip to South Australia in the foreseeable future; and they also indicated a very high (97%) willingness to recommend the trip

to others. There were not any significant differences (independent sample t-tests) for willingness to recommend ratings when considering gender or inland versus coastal route travelled. Likewise, there were not any significant differences (ANOVA) for willingness to recommend ratings when considering age, occupation or state of residence.

Table 9: Willingness to recommend this specific trip to others

Willingness	Survey A %	Survey B + C %	Total %
Definitely would	67	72	70
Probably would	28	25	26
Unsure	4	2	3
Probably wouldn't	0	1	1
Definitely wouldn't	0	0	0

Overall satisfaction with the trip had a very high mean of 4.5 (maximum 5) for the Survey A respondents, with most recording they were very (63%) or fairly satisfied (33%) (Table 10). Similar satisfaction ratings were recorded for Survey B and C respondents, with an overall mean of 4.6. There were not any significant differences (independent sample t-tests) for overall satisfaction ratings when considering gender or inland versus coastal route travelled. Likewise, there were not any significant differences (ANOVA) for overall satisfaction ratings when considering age, occupation or state of residence.

Table 10: Overall satisfaction with the Limestone Coast trip

Satisfaction	Survey A (n = 47)	Survey B + C (n =150)	Total (n=197)
	%	%	%
Very satisfied	63	67	66
Fairly satisfied	33	29	30
Neither satisfied nor dissatisfied	0	3	2
Fairly dissatisfied	0	0	0
Very dissatisfied	4	1	2
Overall Satisfaction	4.5	4.6	4.6

Summary and implications for stakeholders

Involvement in tourist activities (e.g. self-drive travel) can be likened to other services that customers choose to participate in. Therefore, feedback from customers that includes such measures as overall satisfaction (Table 10) and willingness to recommend (Table 9) provide relatively reliable indications of customers' likely future behaviour related to that service (self-drive trip). Willingness to recommend a service to other prospective customers (word-of-mouth advocacy) as a valid measure of behavioral loyalty is supported in the customer satisfaction literature (Voss, Roth, Rosenzweig, Blackmon & Chase 2004) and the service quality literature (Zeithaml, Bitner & Gremler 2006; Rundle-Thiele 2005; Reichheld 2003). Furthermore, because satisfaction is often considered as an antecedent to the future intentions (e.g. willingness to recommend) of customers (Wong 2004; Cronin 2003; Oliver 1997), measuring overall satisfaction with a service should indicate future support for that service. Consequently, the relatively positive feedback for overall satisfaction and willingness to recommend this trip to others indicates the respondents are likely to provide word-of-mouth promotion to encourage friends and relatives to consider a future drive-trip to the Limestone Coast region of South Australia.

As a global measure, overall satisfaction can be considered as a post-service evaluative judgment that is reflected in the customers' overall feelings toward that service (Choi & Chu 2001) which have built up over time (Gustafsson, Johnson & Roos 2005). Furthermore, there is support for satisfaction mainly as an emotional response (Wong 2004), which tends to be influenced by extremes of dissatisfaction and satisfaction. Consistent with this assertion is that the high overall satisfaction recorded in this study appears to be supported by the respondents' overall experience with the trip that was mainly described in terms that denote a high level of emotion such as 'wonderful' and 'breathtaking' (36%), and 'fulfilling' and 'enjoyable' (33%) (Table 7). A similar percentage of respondents (69%) who recorded such positive experiences also recorded that they were very satisfied (66%) and definitely would recommend a similar trip to others (70%). It appears that the scenery

and natural environment dominated the respondents' written comments, highlighting aspects of the trip that made the experience unique (Tables 23 and 24). Such feedback provides stakeholders (e.g. tourism operators) with qualitative information to assist in product development and marketing initiatives relevant to self-drive tourism in the Limestone Coast region. If a drive route offers unique vistas and impressive scenery, it is likely to surprise travellers, thus evoking highly positive emotions. Providing unexpected surprises (Verma 2003) can delight customers, which tends to be associated with high-arousal emotions (Rust & Oliver 2000).

Personal Benefits of the Trip

While almost all respondents listed 'holiday' or 'leisure' as the main purpose for their trip, further understanding of their motivations for taking the South Australia self-drive trip can be gleaned from the importance of various benefits (Tables 11 and 12). Survey A respondents rated the importance of seven benefits (this was increased to nine benefits for Surveys B and C) on five-point Likert-type scales (1= low and 5 = high).

Table 11: Perceived benefits to respondents – Survey A

Benefit	Importance of benefit (M)	Achievement of benefit (M)	Achievement – Importance gap (M)
Relaxation	4.1	4.1	0
Spending time with family and/or friends	3.6	4.0	0.4
Meeting new people	2.9	3.3	0.4
Enjoying the scenery	4.6	4.6	0
Visiting interesting towns	4.3	4.2	-0.1
Enjoying local history and culture	4.1	4.0	-0.1
The freedom to change plans en route	4.1	3.8	-0.3

Scales range from 1 = low, to 5 = high; M = mean

The highest rated benefit for Survey A respondents (Table 11) was 'Enjoying the scenery' (4.6), which also received a 4.6 mean rating for this benefit being achieved. 'Visiting interesting towns', 'Enjoying local history and culture' and 'Relaxation' also rated relatively high in importance (4.3, 4.1 and 4.1 respectively) as well as for achievement of the benefit (4.2, 4.0 and 4.1 respectively). Respondents' written comments on aspects of the trip they enjoyed the most (Table 17) also tend to support these results.

A major motivator for self-drive tourism is the relative independence and autonomy it affords travellers (Trimble 1999b; Yann, Campbell, Hoare & Wheeler 1999). The gap (-0.3) between the importance and benefit achieved for 'The freedom to change plans en route', however, may have been influenced by pre-trip commitments (e.g. reservations for accommodation or Kangaroo Island Ferry bookings) that required the respondents to meet some timelines, given that Survey A was from a database of customers that had pre-booked their travel arrangements. 'Spending time with family and/or friends' and 'Meeting new people' rated relatively low as benefits sought (3.6 and 2.9), and both recorded positive gaps when considering their achievement ratings.

ANOVA and independent samples t-tests identified few significant differences for either the importance of benefits or the extent they were achieved when considered for such variables such as gender, age or occupation. One benefit that was significantly different was 'Spending time with family and/or friends', which recorded an importance rating of 4.1 for Victorian respondents compared to 2.9 for New South Wales respondents ($t = -2.770$, $df = 42$, $p = .008$). The extent to which 'Spending time with family and/or friends' was achieved was also higher ($M = 4.2$) for Victorian respondents compared to New South Wales respondents ($M = 3.7$).

This data for Survey B and C respondents were combined (Table 12) as there were few significant differences between them (t-test statistics). 'Enjoying the scenery' was the highest rated benefit in terms of its importance ($M = 4.6$) as well as the extent to which it was achieved ($M = 4.5$). Additionally, stepwise regression analysis indicated a close link between the benefit achieved; 'Enjoying the scenery' and 'Overall satisfaction' with the Limestone Coast drive route ($F = 17.25$, $df = 1, 122$; $p < .001$). 'Discovering and exploring new places' and 'Experiencing nature and the natural environment' were the second highest rated benefits in terms of their importance ($M = 4.5$) as well as the extent to which they were achieved ($M = 4.4$). Respondents' written comments on aspects of the trip they enjoyed the most (Tables 18 and 19) provide additional support for these results, with frequent comments being recorded for 'scenery, nature and the natural environment'.

Table 12: Perceived benefits to respondents – Survey B and C

Benefit	Importance of benefit (M)	Achievement of benefit (M)	Achievement – Importance gap (M)
Relaxation	4.3	4.2	-0.1
Enjoying time with family and/or friends*	3.8	4.0	0.2
Enjoying meeting new people*	3.3	3.5	0.2
Enjoying the scenery	4.6	4.5	-0.1
Visiting interesting towns (and attractions)*	4.4	4.3	-0.1
Enjoying local history and culture	4.1	4.1	0
The freedom to change plans en route	4.2	4.1	-0.1
Discovering and exploring new places**	4.5	4.4	-0.1
Experiencing nature and the natural environment**	4.5	4.4	-0.1

Scales range from 1 = low, to 5 = high; * Wording changes were made to these benefits following Survey A; ** These benefits were added to the questionnaire following Survey A; M = mean

There were not any significant differences for the importance of benefits or the extent to which benefits were achieved when considering gender of the Survey B and C respondents (t-test statistics). However, Survey B and C respondents who travelled on the coastal route compared to those on the inland route recorded significantly higher ratings (mean of 4.1 compared to 3.8) for the extent to which they achieved the benefit 'Enjoying local history and culture' ($t = 2.193$, $df = 131$, $p = .03$). ANOVA identified few significant differences for either the importance of benefits or the extent they were achieved, when considering occupation categories, age or state of residence.

Respondents whose occupation category was 'Professional' rated the importance of 'Relaxation' significantly higher ($p < .001$) than the 'Retired' category ($M = 4.6$ compared to 4.0). However, the extent to which 'Relaxation' was actually achieved was only slightly higher ($M = 4.4$) for the 'Professional' category compared to the 'Retired' category ($M = 4.2$). While 'Enjoying time with family and/or friends' was a low priority for the 'Retired' category ($M_{importance} = 3.4$; $M_{achieved} = 3.7$), it was significantly higher ($p < .05$) for the 'Professional' category ($M_{importance} = 4.0$; $M_{achieved} = 4.4$). When factor analysis was conducted on the importance ratings for the nine benefits (Appendix B), the two benefits 'Relaxation' and 'Enjoying time with family and/or friends' loaded on the same factor (Factor 2 or 'Family relaxation'). 'Family relaxation' recorded a significantly higher mean for 'Professionals' ($M = 4.3$) compared to 'Retired' respondents ($M = 3.7$) ($t = 3.313$, $df = 95$, $p < .002$). Achievement of benefits also was significantly higher for 'Family relaxation' for 'Professionals' ($M = 4.4$) compared to 'Retired' respondents ($M = 3.9$) ($t = 3.042$, $df = 91$, $p < .003$).

Because the majority of Queensland and New South Wales / Australian Capital Territory respondents were 'Retired' and most of the 'Professional' respondents were from South Australia and Victoria, similar results were found when comparing respondents by their home state. For example, 'Family relaxation' recorded a significantly higher importance mean for South Australia ($M = 4.4$) compared to Queensland ($M = 3.6$) and New South Wales / Australian Capital Territory ($M = 3.8$); and for Victoria ($M = 4.2$) compared to Queensland ($M = 3.6$) ($F = 4.750$; $df = 3, 119$; $p < .005$). Achievement of benefits also was significantly higher for 'Family relaxation' for South Australia ($M = 4.3$) compared to Queensland ($M = 3.8$) and New South Wales / Australian Capital Territory ($M = 3.8$); and for Victoria ($M = 4.2$) compared to Queensland ($M = 3.8$) ($F = 3.481$; $df = 3, 113$; $p < .05$).

In contrast, Factor 1 ('What tourists can see, do and experience': 'Enjoying the scenery', 'Discovering and exploring new places', 'Visit interesting towns and attractions', 'Experiencing nature and the natural environment', 'Freedom to change plans en route' and 'Enjoying local history and culture'), recorded a significantly higher importance mean for Queensland ($M = 4.6$) compared to South Australia ($M = 4.3$) and Victoria ($M = 4.4$), ($F = 4.041$; $df = 3, 130$; $p < .01$).

Summary and implications for stakeholders

Benefits sought help explain the reasons why customers choose a specific activity or service (Ahmad 2003; Haley 1995), and there appears to be a close link between benefits expected from an activity and motivations or reasons to participate in that activity (Little, Lloyd & Schmidt 2005). In considering a self-drive trip as a service, it is likely that each individual will achieve a combination of benefits as a result of their overall experience on the trip. Identification of the main benefits that are important to specific self-drive market segments can provide

stakeholders (e.g. local tourism operators) with information to assist in product development and marketing initiatives relevant to self-drive tourism in their region. For example, respondents in this study included three segments or clusters (Appendix C).

One cluster (23% of respondents) was described as ‘Mature couples’. All of this cluster were retired, most were between 60 and 69 years of age, most travelled with a partner and two-thirds of them stayed in caravan parks. This cluster placed a high priority on benefits related to scenery, nature and interesting local places and attractions. Consequently, promotional materials to target ‘Mature couples’ should focus on benefits such as ‘Enjoying the scenery’, ‘Discovering and exploring new places’, ‘Visiting interesting towns and attractions’ and ‘Experiencing nature and the natural environment’. Promotional materials could consider using specific items from respondents’ written comments on aspects of the trip that they enjoyed the most (Tables 18 and 19).

In contrast, a second cluster (24% of respondents) was described as ‘Relaxing with family’. All of this segment were employed, three-quarters of them in professional occupations. Two-thirds of this cluster were between 30 and 49 years of age and two-thirds travelled with family groups. The most important benefits sought by this segment were opportunities to relax and enjoy time with family and/or friends. Accordingly, these benefits should be highlighted in promotional materials to target this segment. If this segment is important to local tourist operators then they may develop services that facilitate attainment of such benefits, such as family-oriented activities.

Importance and Satisfaction with Drive Route Features

While benefits tended to be a personal expression of outcomes that travellers perceived they had achieved from their trip, feedback on a range of features or attributes of the external environment allow stakeholders such as regional tourism businesses, local governments and state governments to adjust services relevant to the drive tourism experience. Survey A respondents rated the importance of eight features (this was increased to nine features for the other two data collections) on five-point Likert-type scales.

Survey A respondents indicated that on these Limestone Coast drive routes three features (‘Accommodation’, ‘The quality of the roads’ and ‘Road signage to towns’) were rated relatively high for importance and also recorded similar satisfaction ratings (Table 13). Satisfaction with three features exceeded their relative importance ratings (‘Visitor information centres’, ‘Places of interest to stop en route’, and ‘Available tourist information en route’), thus indicating these as relative strengths of these drive routes. However, two other features (‘Road signage to attractions’ and ‘Facilities at rest stops’) were seen to be relatively important but recorded relatively lower satisfaction ratings. Further clues as to the lower satisfaction for these features can be obtained by reviewing the write-in responses for problems encountered on the trip (Table 20).

Table 13: Importance and satisfaction with drive route features – Survey A

Feature	Importance of feature (M)	Satisfaction with feature (M)	Satisfaction – Importance gap (M)
The quality of the roads	4.2	4.2	0
Places of interest to stop en route	3.9	4.2	0.3
Facilities at rest stops (e.g. food, toilets)	4.2	3.8	-0.4
Available tourist information en route	3.9	4.2	0.3
Road signage to attractions	4.3	4	-0.3
Road signage to towns (e.g. distances to towns)	4.3	4.2	-0.1
Accommodation	4.3	4.3	0
Visitor Information Centres	4	4.3	0.3

Scales range from 1 = low, to 5 = high; M = mean

The data for the Survey B and C respondents were combined (Table 14) as there were few significant differences between them (t-test statistics). Stepwise regression analysis indicated a close link between satisfaction with accommodation and overall satisfaction with the Limestone Coast section of the drive route ($F = 16.15$; $df = 1, 127$; $p < .000$). Further clues as to the lower satisfaction for specific features can also be obtained by reviewing the write-in responses for problems encountered on the trip (Tables 21 and 22).

Table 14: Importance and satisfaction with drive route features – Surveys B and C

Feature	Importance of feature (M)	Satisfaction with feature (M)	Satisfaction – Importance gap (M)
The quality of the roads	4.3	4.2	-0.1
Places of interest to stop en route	4.1	4.3	0.2
Facilities at rest stops (e.g. food, toilets)	4.2	4.0	-0.2
Available tourist information en route	4.0	4.4	0.4
Road signage to attractions	4.4	4.1	-0.3
Road signage to towns (e.g. distances to towns)	4.5	4.2	-0.3
Accommodation	4.2	4.4	0.2
Visitor information centres	4.3	4.7	0.4
Access to services (e.g. food, mechanics) en route**	4.0	4.1	0.1

*Scales range from 1 = low, to 5 = high; ** This feature was added to the questionnaire following Survey A; M = mean*

Features that warrant further examination include 'Road signage to attractions', 'Road signage to towns' and 'Facilities at rest stops'. When considering these three features by the home state of respondents (Table 15), 'Road signage to attractions' was of particular concern for Queenslanders (Satisfaction – Importance gap = -0.8), who also had the highest importance ratings for 'Road signage to towns'. New South Wales / Australian Capital Territory respondents indicated particular concerns for 'Facilities at rest stops' (Satisfaction – Importance gap = -0.7).

Table 15: Importance and satisfaction with drive route features by state – Surveys B and C

Feature	Importance of feature (M)	Satisfaction with feature (M)	Satisfaction – Importance gap (M)
Road signage to attractions	4.4	4.1	-0.3
Victoria (n = 42)	4.3	4.0	-0.3
South Australia (n = 52)	4.4	4.3	-0.1
New South Wales / Australian Capital Territory (n = 16)	4.4	4.1	-0.3
Queensland (n = 17)	4.8	4.0	-0.8
Road signage to towns (e.g. distances to towns)	4.5	4.2	-0.3
Victoria (n = 42)	4.4	4.0	-0.4
South Australia (n = 52)	4.5	4.4	-0.1
New South Wales / Australian Capital Territory (n = 16)	4.4	4.1	-0.3
Queensland (n = 17)	4.7	4.2	-0.5

Facilities at rest stops (e.g. food, toilets)	4.2	4.0	-0.2
Victoria (n = 42)	4.2	4.0	-0.2
South Australia (n = 50)	4.1	4.0	-0.1
New South Wales / Australian Capital Territory (n = 16)	4.5	3.8	-0.7
Queensland (n = 17)	4.2	4.2	0

M = mean

Major differences also were recorded between the two largest occupation categories ‘Retired’ respondents and ‘Professional’ respondents for the features ‘Road signage to attractions’, ‘Road signage to towns’ and ‘Facilities at rest stops’ (Table 16). Retired respondents were relatively more concerned with each of these features as demonstrated by the Satisfaction – Importance gaps of -0.6, -0.4 and -0.5, respectively. Further clues as to the lower satisfaction for specific features can also be obtained by reviewing the write-in responses for problems encountered on the trip (Tables 21 and 22).

Table 16: Importance and satisfaction with drive route features by selected occupation categories – Surveys B and C

Feature	Importance of feature (M)	Satisfaction with feature (M)	Satisfaction – Importance gap (M)
Road signage to attractions	4.4	4.1	-0.3
Professional (n =40)	4.2	4.4	0.2
Retired (n = 66)	4.5	3.9	-0.6
Road signage to towns (e.g. distances to towns)	4.5	4.2	-0.3
Professional (n =40)	4.5	4.5	0
Retired (n = 66)	4.4	4.0	-0.4
Facilities at rest stops (e.g. food, toilets)	4.2	4.0	-0.2
Professional (n =40)	4.0	4.3	0.3
Retired (n = 66)	4.3	3.8	-0.5

M = mean

When factor analysis was conducted on the importance ratings for the nine features (Appendix B), Factor 3 (‘Road features’) included three features (‘Road signage to attractions’, ‘Road signage to towns’ and ‘Quality of the roads’). Satisfaction with ‘Road features’ differed significantly for ‘Professionals’ (M = 4.5) compared to ‘Retired’ respondents (M = 4.0) ($t = 3.167$, $df = 106$, $p < .002$). However, Factor 1 (‘Tourist services’: ‘Available tourist information en route’, ‘Visitor information centres’ and ‘Places of interest to stop en route’), recorded a significantly lower importance mean for ‘Professionals’ (M = 3.9) compared to ‘Retired’ respondents (M = 4.3) ($t = -3.386$, $df = 103$, $p < .001$). Similarly, ‘Tourist services’ recorded a significantly higher importance mean for Queensland (M = 4.6) compared to South Australia (M = 4.0) and Victoria (M = 4.1); and for New South Wales / Australian Capital Territory (M = 4.4) compared to South Australia (M = 4.0) ($F = 6.668$; $df = 3, 128$; $p < .001$).

Summary and implications for stakeholders

Service quality models offer a conceptual framework for understanding the features (attributes) of a service (Grönroos 2001). In tourism and leisure services, service quality focuses on attributes of direct relevance to the customer. Drive route features or attributes of the external environment that are important to the overall drive experience for self-drive travellers include road infrastructure (Olsen 2002), road signage (Taylor, Nelson & Sofres 1999), accommodation (Prideaux & Carson 2003) and visitor information (Hardy 2003). Disconfirmation or ‘gap’ models are often used to measure service quality (De Ruyter, Bloemer & Peeters 1997). This study examined the importance of eight drive route features compared to how satisfied respondents were with each. All eight features were rated as relatively important, with road signage as a high priority. The lower satisfaction and resultant wider Satisfaction – Importance gaps identified the following features as of most concern: ‘Road signage to attractions’, ‘Road signage to towns’ and ‘Facilities at rest stops’.

Identifying travel segments that were most concerned with specific features provides stakeholders (e.g. regional tourism operators, local and state governments) with a better understanding of features that they could consider modifying. For example, 'Road signage to attractions' was of particular concern for travellers from Queensland, while New South Wales / Australian Capital Territory respondents indicated particular concerns for 'Facilities at rest stops'. Qualitative information that further specified where improvements could be made was generated by written responses to open-ended questions. It was apparent that the long stretches of road in remote areas that have limited signed stopping places (e.g. Robe to the north end of the Coorong) were considered to be a particular problem. One suggestion was to provide more stopping bays and interpretive signage (e.g. a history board at Salt Creek). More distance signage to attractions was another recommendation (e.g. to Bool Lagoon).

Chapter 3

SUMMARY OF WRITTEN RESPONSES

Aspects of the Trip That Respondents Enjoyed the Most

Almost all Survey A respondents listed at least one aspect of the trip that they enjoyed (Table 17) and these tend to support the respondents' overall experience with the trip (Table 7) which were described in terms that denote a high level of feeling such as 'wonderful and breathtaking' (36%), and 'fulfilling and enjoyable' (33%); to less emotive responses such as 'interesting' (13%) and 'relaxing' (14%). The written comments (Table 17) also tend to be consistent with the benefits of the trip that were of high importance and were achieved by respondents, especially 'Enjoying the scenery', 'Visiting interesting towns', 'Enjoying local history and culture' and 'Relaxation' (Table 11). Enjoyable aspects of the trip also were consistent with the external or environmental features that were rated important as well as being rated as satisfying, such as 'Accommodation' and 'The quality of the roads' (Table 13). These positive features and benefits could be considered in future marketing for the Limestone Coast drive routes.

Table 17: Aspects of the trip that respondents enjoyed the most – Survey A

General

- Everything it was all new
- Everything
- Always finding the unexpected
- The sense of adventure, covering such a large distance, seeing rural Australia
- Growth of tourism since last visit
- Information from South Australia Tourism best in Australia
- SeaLink's complete booking service
- All of it arranged by SeaLink and accommodation high standard and met our needs. Very friendly people and very helpful

Scenery

- Sights
- The scenery
- The scenery
- Scenery
- The changing scenery
- Great scenery
- Good scenery
- Range of scenery and locations
- The scenery
- Wonderful scenery
- Seeing new places
- Sightseeing
- Finding pleasant places to walk, parks, riverbanks etc
- Scenery, Limestone Coast is quite spectacular though the weather wasn't great, towns and tourist attractions kept us busy
- Varied landscape coastal wine regions
- The Coorong is magic
- Scenery along the Coorong
- Our trip along the Coorong was one of the highlights, visiting all the various attractions
- The Coorong, bushland
- Spectacular rock formations (in caves) and visits to the lighthouses

- Beaches
- Our trip was from Melbourne to Kangaroo Island via Robe and Victor Harbour where we stayed for a total of five nights
- Our four-wheel-drive club has stayed in Robe / Beachport many, many times and love the beach driving

History and culture

- Liked some of the different towns with their historic buildings and unique shops
- History and culture
- Interesting historical towns like Penola
- The cottage industries (honey, sheep farm and eucalyptus farm)
- Wineries
- Finding good local food/wine
- Food
- Lunch at the old butter factory at Meningie

Accommodation

- The high quality of the ensuite cabins in the caravan parks
- Liked the Robe caravan park with indoor pool

Relaxation

- Relaxation and taking our time
- Relaxing
- Relaxed
- Being able to totally relax
- Being able to be flexible and take our own time
- Freedom to go where we wanted

People, friends and relatives

- Friendly people
- Friendly people
- Meeting new people
- Visiting relations
- Seeing my friends in Mt Gambier
- Being with family

Roads

- The road journey
- Travelling on roads we'd never used before
- The condition of the roads
- Good roads
- Not too much traffic

Animals and wildlife

- Animals
- Wildlife
- Abundant wildlife – American friends loved it
- We were able to enjoy the wildlife (seals in particular)
- The fishing
- Sheep dairy

In Table 18, the comments listed have been included as indicative of the type of comments offered by respondents. They represent a selection of the general range of comments.

Table 18: Aspects of the trip that respondents enjoyed the most – Survey B

General (9)

- Safe for the whole family – Town Beach in Robe
- Maps available
- The information centres were very informative
- Locals were very helpful (winery staff and coffee shops etc) directed us and gave us tips of what to see
- Staff at wineries very helpful and friendly
- Speaking to the visitors centre staff

Scenery, nature and natural environment and associated activities (90)

- Driving through Coonawarra and enjoying the scenery
- The pelicans
- The natural beauty of the area
- Unspoilt atmosphere (not too commercialised)
- Calmness of the picturesque environment
- Farmlands
- Coastal regions / coast line
- Beautiful / empty Beaches / jetty
- National parks
- Coastline walks
- Swimming clean, clear water
- Swimming at Long Beach Robe
- Walking around coastal paths along cliffs near the obelisk
- Walking around beaches and cliff paths from long beach to town of Robe

Interesting towns and attractions (40)

- Various towns / areas listed – predominantly Robe, Kingston, Penola, Coorong, Beachport

Local history and culture (including food and wine) (26)

- Wines in Coonawarra
- Great food and wine
- The crayfish and local shiraz
- Fresh lobster and fish (2)
- Local seafood
- Eating crayfish at sunset on the beach at Canunda with a good bottle of local wine
- Discovering walking trails with details of local history
- Walking around streets in Robe to view the heritage buildings
- History

Relaxation (8)

- It is quiet and peaceful (not too much traffic) (4)
- Very low stress high enjoyment holiday
- Relaxing

People, friends, relatives (1)

- Sharing sightseeing and walks with family and friends from Adelaide for a weekend

Accommodation (1)

- Accommodation was fine – met expectations

In Table 19, the comments listed have been included as indicative of the type of comments offered by respondents. They represent a selection of the general range of comments.

Table 19: Aspects of the trip that respondents enjoyed the most – Survey C

General (28)

- Civic pride shown by all towns in this area
- Local friendly help when required
- All new experience
- Free availability of information / tourist guides
- Historical info
- Info centre and museum at Millicent
- Clean public amenities
- Good facilities in Mt Gambier

Scenery, nature and natural environment and associated activities (41)

- Mt Gambier's natural attractions and walks
- The beauty of the area and its natural resources
- Not over commercialised or developed
- The beautiful scenery
- Coastal views / scenery
- Birdlife in Coorong
- Swimming in southern ocean
- Walking along coast and historic areas

Interesting towns and attractions (55)

- Various towns listed – predominantly Kingston, Mt Gambier, Beachport and Robe
- The many attractions in Mt Gambier

Local history and culture (including food and wine) (6)

- History
- The historical buildings and restorations
- Wonderful eating places in Penola – has gone ahead leaps and bounds in the five years we have been visiting
- Wineries

Accommodation (1)

- Meningie caravan park was very good

Roads (6)

- Main roads were well-maintained
- Quality of roads
- Minimal traffic

Problems That Detracted From the Trip

Over half (53%) of the Survey A respondents indicated that they had a problem during their trip. However, a number of these were problems with their vehicle or with family members rather than with an external factor such as roads or accommodation. Only 39% of the respondents specified problems with the Limestone Coast sector of their trip, which are summarised in Table 20.

Table 20: Problems recorded by respondents that detracted from this trip – Survey A

Facilities at rest stops

- Long stretches of road with little of interest. More stopping places with signed walks and information
- Road side facilities could be improved in more remote areas on major highway routes
- A few more facilities where you could take photos especially with a caravan on. Amenities and stopping bay along the way for stops

Road signage

- Better road signage
- More road speed and distance signs
- Advance signage on the highway was often either confusing, or too late to get into turn-offs correctly
- Confusion and lack of access to Adelaide expressway. Better information and access to Adelaide expressway

Available information en route

- We spent seemingly many hours driving between Robe and Meningie but weren't aware of what features or history that we were passing. Could provide a strip map/history info sheet of interest, specifically canvassing this area
- To indicate in literature places of interest closed during off season or restricted hours
- A small history board at Salt creek could be enhanced

Quality of roads

- Roads
- Improve tourist roads
- In some areas, the roads are quite narrow, making it rather difficult when towing a caravan (generally off the bitumen). Some minor damage to car (aerial) from low branches of tree

Places of interest to stop en route

- Travelling long distances trying to be at the destination before dark could be tiring
- Drought – dry scenery (but nothing could fix this except some rain)

Available information interstate

- More information at the travel agents in Victoria
- Publicity in other states regarding the fruit fly barrier and the need to travel without fruit

Accommodation

- Finding affordable accommodation
- A more modern choice of accommodation midway between Melbourne and Adelaide

In Table 21, the comments listed have been included as indicative of the type of comments offered by respondents. They represent a selection of the general range of comments.

Table 21: Problems recorded by respondents that detracted from this trip – Survey B

Road signage (7)

- Few signs on minor roads
- Just need to know distance to attractions – i.e. Bool Lagoon – how far from the road

General (17)

- Disappointed at not being able to buy local fish from the local fish and chip shop. Imported so didn't buy any! (at Beachport)
- Oranges sold in local supermarkets imported from the United States, olives served in Coonawarra

<p>restaurant imported.</p> <ul style="list-style-type: none">• Cellar door prices higher than retail prices• The strong windy conditions that are prevalent at this time of the year made it uncomfortable to enjoy at times• Didn't realise how smelly Coorong would be. Took us by surprise; would love an explanation about this area• Robe nice place but very expensive
<p>Available information en route (1)</p> <ul style="list-style-type: none">• When visiting info centres we have now learnt to ask questions, e.g. Bool Lagoon, does it have lots of water?
<p>Quality of roads (5)</p> <ul style="list-style-type: none">• Heading to Robe we decided to go via Nora Creina but after a short distance turned back as the road was too rough for a sedan car
<p>Places of interest to stop en route (3)</p> <ul style="list-style-type: none">• Larry the lobster really needs a make-over and the surrounding area around Larry is not acceptable
<p>Facilities / accommodation (7)</p> <ul style="list-style-type: none">• Booking 'deluxe' accommodation, which was very much standard• We booked at Robe for four nights and realised we only wanted to stay for two and the campsite would not let us out of the booking• A lack of children's activities apart from beach (no trampoline, mini golf, etc)
<p>Access to services (1)</p> <ul style="list-style-type: none">• Son-in-law could not access mechanics on return trip via Tailem Bend, Kingston, Meningie on a Sunday

In Table 22, the comments listed have been included as indicative of the type of comments offered by respondents. They represent a selection of the general range of comments.

Table 22: Problems recorded by respondents that detracted from this trip – Survey C

<p>General (12)</p> <ul style="list-style-type: none">• Bad weather• The smell of Coorong• Sometimes not feeling as safe in deserted areas being a single female• Getting a little lost on country roads
<p>Available information en route (8)</p> <ul style="list-style-type: none">• Maps and signage• Mt Gambier info centre understaffed and lack of literature – no map of town
<p>Quality of roads (8)</p> <ul style="list-style-type: none">• Our TV in the caravan was dislodged from its safe and secure position due to road conditions (undulations)• Not enough passing lane or road side stops with toilets• The unsafe condition of the unsealed sections of Nora Creina road from Robe
<p>Accommodation (10)</p> <ul style="list-style-type: none">• Accommodation – a little expensive e.g. cabin quite basic \$330 per week• Camping areas in Nat parks, particularly Coorong area, could be improved
<p>Facilities at rest stops (2)</p> <ul style="list-style-type: none">• No toilets at Robe lookout or landmark indicator (Robe lookout very unkempt)• Lack of spots to pull off road for caravans, particularly with toilets

Road signage (2)

- Lack of relevant signage

Special Aspects of the Trip That Made the Experience Unique**Table 23: Was there anything special about the Limestone Coast section of your trip to South Australia that made your experience unique? – Survey B**

Food and drink	<ul style="list-style-type: none"> • Good food • Wineries • We found our favourite coffee • Redman wines in particular • Well priced crayfish – Robe fish and chip shop • Coonawarra wines • Cape Jaffa wineries • Mahalias outlet in Robe • Wonderful seafood (fresh from trawlers) • Irish café in Penola was a treat • Eating fresh cooked lobster at Southend • Bought Lobster and wine to eat along the road – sat by Murray and thoroughly enjoyed it • Discovering the fabulous unexpected wineries of Cape Jaffa
Scenery / natural environment	<ul style="list-style-type: none"> • Clear hot weather conditions made the stunning scenery at its best e.g. warm bluey-green sea contrasted with the beige limestone coastline was visually stunning • Not too crowded • Natural surrounds of scrubland • Natural environment • Neatness, cleanliness and greenness of all the towns • Sea breeze • Magnificent / great scenery • Totally new places to explore • Gorgeous countryside • The geology around Mt Gambier/Naracoorte • Clean beaches • Natural scenic areas • Friendly farming areas • The pool of Siloam • Coastal areas • Cape Jaffa lighthouse tour • Unique Bird life at Bool Lagoon • The coastline at Port MacDonald • Southport where the Stabba Naracoorte caves were quite shining and fabulous • Blue Lake was cool • Wind farms • The Coorong • Lakes • Limestone Caves • Frog island • Cape Jaffa • Oceanside

	<ul style="list-style-type: none"> • Naracoorte caves
Benefits	<ul style="list-style-type: none"> • An enjoyable experience • Overall experience • The unique difference
History	<ul style="list-style-type: none"> • History of places / towns • All the history • Wonderful history of early settlement and sea exploration • History of Coorong
Facilities	<ul style="list-style-type: none"> • Beaches and wineries in one spot (cool)
Activities	<ul style="list-style-type: none"> • Catching up with friends • Fishing • Walking around the rim of extinct volcanoes (e.g. Mt Schank) driving on the beach • Snorkelling at Ewan's ponds • Wildlife spotting • Four-wheel-driving around Beachport • Long Beach walk • Beautiful walk
Other	<ul style="list-style-type: none"> • Friendliness of locals • Nice tourist officer in Nelson • Hot weather • Perfect weather
Places	<ul style="list-style-type: none"> • Coonawarra (bravo for such a warm welcome) • Robe.
Serenity	<ul style="list-style-type: none"> • Unspoilt / quiet • Isolation from other busy areas

Table 24: Was there anything special about the Limestone Coast section of your trip to South Australia that made your experience unique? – Survey C

Scenery / natural environment	<ul style="list-style-type: none"> • Pristine air • The colour of the ocean • The beauty of the coast • Being near the ocean • Coastal scenery (2) • Different scenery to other areas of Australia • Flocks of emus, some kangaroos and beautiful sunsets • More space and less pace • Natural landscape is very different • The ambience of the view from fail at Robe • Geology of the area • The age of the area historical and geographical • The Flinders Ranges explored several years ago. Beautiful. South Australia. Best kept secret, fantastic history. By the end of our self-drive and discovery trip of South Australia, shall have been here for 12 weeks exploring from Pt Lincoln to Mt Gambier and Kangaroo Island • Already have explored all Flinders Ranges also all Peninsulas • Fossil cave (Victoria)
--------------------------------------	--

	<ul style="list-style-type: none"> • The Blue Lake • The unique land formations (2) • Sink holes • Mt Gambier area • Coorong • Naracoorte caves
Facilities	<ul style="list-style-type: none"> • Blend of old world charm and modern facilities
Food and drink	<ul style="list-style-type: none"> • Dinner at the Old Mundulla Rib • Wineries • Crayfish • Farm fresh produce
Other	<ul style="list-style-type: none"> • The helpfulness of the people • Friendly helpful people • Courteous people • Aquifer Tom at Blue Lake • The trip met our expectations • The huge expanse of farmland • Uniqueness • Lots of dead kangaroos • Different and very interesting • Fossils • Always wanted to come here and it was better than expected • The local assistance offered in making bookings at the information centre • Tourist incentive run by limestone coast tourism (60 cents/litre off fuel) • South Australia style of architecture 1850 on to early 1900 – they have been maintained with care and attention and pride • History • The weather
Places	<ul style="list-style-type: none"> • Even small towns were pretty and well maintained • Fishing fleets • Caves • Extremely clean, pleasant townships • Beachport • The different coastline • Farmers market in Beachport Saturday Easter weekend was fabulous meeting producers, tasting their produce
Activities	<ul style="list-style-type: none"> • Going to the SE field days • The walks on the back beach section of Beachport • Tour of Trout farm • Talking to artist (Terry Johnson and his wife) in Robe. He was so friendly and interesting to talk to. He also gave us some great tips about what to do around the place
Serenity	<ul style="list-style-type: none"> • Peace of the conservation parks • No crowds • Quiet

Chapter 4

CONCLUSIONS AND RECOMMENDATIONS

A major recommendation is for adoption of data collection methods that are likely to maximise the representativeness of samples. Inadequate samples will fail to provide valid, actionable information for industry to confidently use for marketing and decision-making. For example:

- Using a database for mail-out of questionnaires – limited to situations where a database of contact details exists and is accessible.
- Use of the 'postcard approach' as employed in survey B of this study, ensures minimal imposition on industry personnel involved in data collection. However, this approach appears to be better suited to onsite distribution of post cards to prospective respondents by designated researchers who can briefly explain the research.
- Direct distribution of questionnaires by industry personnel could employ incentives to VIC staff to record refusal rates and for the questionnaires to be distributed only during specified time periods (e.g. a schedule of days to capture a more random spread of visitors over different seasons and during designated holidays compared to non-holiday periods).
- Furthermore, an alternative methodology will be trialled in an extension of the research on other southern Australian drive routes commencing in late 2006. This future research will include onsite data collectors to administer questionnaires to travellers during specified days (e.g. during holiday periods in summer, autumn and winter). Onsite administration of the questionnaire by researchers is expected to yield higher return rates.

Extending this research in the future could adapt the questionnaire to provide more detailed information about the psychology and motivations of drive travellers, and more data on the planning that travellers undertook prior to their trip (Hardy 2003; Olsen 2002):

- A more extensive list of benefits (motivations) would assist in segmentation of the drive market for specific routes. Additional benefits could be derived from (a) focus group meetings with a selection of self-drive travellers, (b) respondents' written comments in this study, (c) relevant literature, and (d) a panel of 'experts' (e.g. tourist operators and academics with expertise in drive tourism research).
- Additional data on planning the trip could include sources of information accessed to inform decisions about the trip itinerary, level of planning prior to the trip and reliance on local information to modify the trip itinerary en route.

Stakeholders (e.g. state tourism commissions, local governments and tourism operators) could consider the findings of this study in their future product development and marketing. For example:

- The high overall satisfaction recorded in this study appears to be supported by the respondents' overall experience with the trip that was mainly described in terms denoting a high level of emotion such as 'wonderful' and 'breathtaking', and 'fulfilling' and 'enjoyable'. Furthermore, the scenery and natural environment dominated respondents' written comments, highlighting aspects of the trip that made the experience unique.
- More targeted product development and marketing could consider specific self-drive market segments identified in this study. One cluster was 'Mature couples', all of whom were retired, tended to travel with a partner and stayed in caravan parks. Promotional materials to target 'Mature couples' should focus on benefits such as: 'Enjoying the scenery', 'Discovering and exploring new places', 'Visiting interesting towns and attractions' and 'Experiencing nature and the natural environment'.
- A second cluster ('Relaxing with family') treasured opportunities for relaxation and enjoying time with family and/or friends. If this segment is important to local tourist operators they could consider offering services that facilitate attainment of such benefits.
- Local stakeholders (e.g. local governments) could consider improving specific features or attributes of the drive route that were of most concern to respondents. For example, 'Road signage to attractions' was of particular concern to travellers from Queensland, while New South Wales / Australian Capital Territory respondents indicated particular concerns with 'Facilities at rest stops'. Qualitative information that further specifies where improvements could be made include the written problems recorded by respondents.

APPENDIX A: FREQUENCY OF SELF-DRIVE TRIPS

It appears that the majority of Survey A respondents had visited South Australia only the once in the last 12 months (84%) or had made only the one self-drive trip to South Australia in the last three years (71%). Self-drive trips in other states in the last three years, however, were more numerous, with almost half of this group taking three or more trips. This indicates that this sample from New South Wales and Victoria are relatively frequent self-drive travellers. Survey B and C respondents also appear to be relatively frequent self-drive travellers, with over half of them undertaking at least three trips in other states in the last three years.

Frequency of self-drive trips

No. of visits	Visits to South Australia in last 12 months (%)	Self-drive trips to South Australia in last three years (%)	Self-drive trips in other states in last three years (%)
Survey A			
0	0	0	11
1	84	71	14
2	16	18	27
3	0	2	9
4	0	5	9
5 or more	0	4	30
Survey B and C			
0	0	0	9
1	62	38	15
2	15	17	20
3	12	14	21
4	4	4	10
5 or more	5	27	24
Total of Survey A, B and C			
0	0	0	10
1	68	48	15
2	16	17	23
3	9	11	18
4	3	4	9
5 or more	4	21	26

APPENDIX B: FACTOR ANALYSIS

The nine benefits (importance) underwent Principal-axis factor analysis with oblique rotation, which resulted in a three-factor solution, accounting for 62% of the total variance. The three factors were: 'What tourists can see, do and experience' (six benefits: 'Enjoying the scenery', 'Discovering and exploring new places', 'Visit interesting towns and attractions', 'Experiencing nature and the natural environment', 'Freedom to change plans en route' and 'Enjoying local history and culture'), 'Family relaxation' (two benefits: 'Enjoying time with family and/or friends' and 'Relaxation'), and 'Meet new people' (one benefit: 'Enjoying meeting new people'). The reliability of each factor varied from an acceptable Cronbach's Alpha value of .828 (What tourists can see, do and experience), to a marginal reliability of .542 ('Family relaxation'). Because 'Meet new people' is a single-item 'factor' no Cronbach's Alpha was recorded.

Factor analysis of benefits (importance) (Pattern Matrix)

Benefit	Factor		
	1. What tourists can see, do and experience	2. Family relaxation	3. Meet new people
Enjoying the scenery	0.748	0.128	0.016
Discovering and exploring new places	0.746	0.111	-0.041
Visiting interesting towns (and attractions)	0.633	0.137	0.146
Experiencing nature and the natural environment	0.608	0.042	-0.209
Enjoying local history and culture	0.450	-0.152	0.153
The freedom to change plans en route	0.449	-0.130	0.046
Enjoying time with family and/or friends	-0.124	0.825	0.261
Relaxation	0.131	0.511	-0.107
Enjoying meeting new people	0.091	0.078	0.795

Similarly, the nine features (importance) underwent Principal-axis factor analysis with oblique rotation, which resulted in a three-factor solution, accounting for 62% of the total variance. The three factors were: 'Tourist services' (three features: 'Available tourist information en route', 'Visitor information centres' and 'Places of interest to stop en route'), 'Basic services' (three features: 'Access to services', 'Accommodation' and 'Facilities at rest stops'), and 'Road features' (three features: 'Road signage to attractions', 'Road signage to towns' and 'Quality of the roads'). Reliability of each factor was also marginal, with Cronbach's Alpha values of .641 ('Tourist services'), .583 ('Basic services') and .597 ('Road features').

Factor analysis of features (importance) (Pattern Matrix)

Feature	Factor		
	1. Tourist services	2. Basic services	3. Road features
Available tourist information en route	0.953	-0.269	-0.143
Visitor information centres	0.469	0.185	-0.032
Places of interest to stop en route	0.421	0.131	-0.010
Access to services en route	0.309	0.643	0.038
Accommodation	-0.045	0.365	-0.090
Facilities at rest stops	0.213	0.327	-0.309
Road signage to attractions	0.211	-0.075	-0.755
Road signage to towns	-0.082	0.267	-0.587
The quality of the roads	-0.001	-0.022	-0.351

APPENDIX C: CLUSTER ANALYSIS

Cluster analysis was based on the 'input' variables: age, occupation, travel group, type of accommodation and home state. A three cluster solution captured 88% of the sample.

Cluster 1 (n=35; 23%) 'Mature couples'	All retired; most 60-69 years of age; one-third from Queensland and smaller numbers from South Australia, Victoria, New South Wales and Western Australia; most travel with partner; two-thirds stay in caravan parks.
Cluster 2 (n=62; 41%) 'Life transition couples'	50% retired and 50% employed (mainly in professional, clerical and manager occupation groups); two-thirds aged 50-59 years; one-quarter 60 years or more; most from South Australia, Victoria and New South Wales; two-thirds travel with a partner; four-fifths stay in caravan parks.
Cluster 3 (n=36; 24%) 'Relaxing with family'	All employed (three-quarters professional); two-thirds aged 30-49 years; most from Victoria and South Australia; two-thirds travel with family groups and one-third with partners; accommodation evenly split between motel/motor inn and caravan parks, and smaller numbers in rented apartments/houses.

Clusters for Survey B and C data

Cluster	Cluster 1 (n=35; 23%) 'Mature couples'	Cluster 2 (n=62; 41%) 'Life transition couples'	Cluster 3 (n=35; 25%) 'Relaxing with family'
Occupation	All retired	50% retired and 50% employed (mainly in professional, clerical and manager employment groups)	All employed, three-quarters in professional category
Age	Most 60-69 years of age	Two-thirds aged 50-59yrs, one-quarter 60 years +	Two-thirds aged 30-49 years
Home state	One-third from Queensland and smaller nos. from South Australia, and Victoria, New South Wales, and WA	Most from South Australia and Victoria and New South Wales	Most from Victoria and South Australia
Travel group	Most travel with partner	Two-thirds travel with a partner	Two-thirds travel with family groups and one-third with partners
Type of accommodation	Two-thirds stay in caravan parks	Four-fifths stay in caravan parks	Evenly split (motel/motor inn and caravan parks), and smaller nos. in rented apartment/house
Benefits sought	'What tourists can see, do and experience'		'Family relaxation'

The three clusters were compared to 'output' variables to ascertain specific 'use' characteristics of the three segments: likelihood of a similar trip in the next three years, overall satisfaction with the trip and willingness to recommend the trip to others; three factors for features (importance) and three factors for benefits (importance).

Significant differences between clusters

There were not any significant differences between the three clusters for overall satisfaction with the trip, and willingness to recommend the trip to others. However, Cluster 3 (M= 4.8) were more likely to make another self-drive trip to South Australia in the foreseeable future compared to Clusters 1 and 2 (M = 4.2 and 4.4) (F = 35.562; df 2, 129; p < .005).

Importance of features

Factor 1 ('Tourist services': 'Available tourist information en route', 'Visitor information centres' and 'Places of interest to stop en route') recorded a significantly lower importance mean for Cluster 3 (M = 3.9) compared to

Clusters 1 and 2 ($M = 4.4$ and 4.2) ($F = 8.386$; $df 2, 127$; $p < .001$). Factor 2 ('Basic services': 'Access to services', 'Accommodation' and 'Facilities at rest stops') recorded a significantly higher importance mean for Cluster 1 ($M = 4.6$) compared to Clusters 2 and 3 ($M = 4.3$ and 4.4) ($F = 4.407$; $df 2, 130$; $p < .05$).

Importance of benefits

Factor 2 ('Family relaxation': 'Enjoying time with family and/or friends' and 'Relaxation') recorded a significantly lower importance mean for Cluster 1 ($M = 3.6$) compared to Clusters 2 and 3 ($M = 4.1$ and 4.4) ($F = 6.543$; $df 2, 115$; $p < .002$). Factor 1 ('What tourists can see, do and experience': 'Enjoying the scenery', 'Discovering and exploring new places', 'Visit interesting towns and attractions', 'Experiencing nature and the natural environment', 'Freedom to change plans en route' and 'Enjoying local history and culture'), recorded a significantly higher importance mean for Cluster 1 (4.6) compared to Clusters 2 and 3 ($M = 4.4$ and 4.3) ($F = 4.062$; $df 2, 128$; $p < .05$).

Achievement of benefits also differed significantly for 'Family relaxation' ('Enjoying time with family and/or friends' and 'Relaxation') for Cluster 3 ($M=4.6$) compared to Clusters 1 and 2 ($M = 3.9$ and 4.1) ($F = 5.256$; $df 2, 110$; $p < .005$).

Future research could include more information to ascertain what it is that motivates these clusters to travel on a specific drive route, including activities participated in and major attractions visited. As well, quantitative data collected from questionnaires, could be complemented by triangulation such as through qualitative research (e.g. focus groups).

REFERENCES

- Ahmad, R. (2003). 'Benefit segmentation: a potentially useful technique of segmenting and targeting older consumers', *International Journal of Market Research*, 45(3): 373-388.
- American Association of State Highway and Transportation Officials (2000). *Strategic Brand Analysis for Scenic Byways*. Bates, USA Midwest.
- Bureau of Tourism Research (2000). *National Visitors Survey*, Bureau of Tourism Research, Canberra.
- Carson, D. Waller, I. & Scott, N. (Eds.) (2002). *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing Pty Ltd, Victoria.
- Choi, T.Y. & Chu, R. (2001). 'Determinants of hotel guests' satisfaction and repeat patronage in the Hong Kong Hotel industry', *International Journal of Hospitality Management*, 20: 277-297.
- Cronin, J.J. (2003). 'Looking back to see forward in services marketing: some ideas to consider'. *Managing Service Quality*, vol. 13(5): 332-337.
- De Ruyter, K., Bloemer, J. & Peeters, P. (1997). 'Merging service quality and service satisfaction: An empirical test of an integrative model', *Journal of Economic Psychology*, 18: 387-406.
- Grönroos, C. (2001). *Service Management and Marketing: A Customer Relationship Management Approach*. 2nd edn, John Wiley & Sons, Chichester, England.
- Gustafsson, A., Johnson, M.D. & Roos, I. (2005). 'The Effects of Customer Satisfaction, Relationship Commitment Dimensions, and Triggers on Customer Retention', *Journal of Marketing*, 69(October): 210-218.
- Haley, R.I. (1995). 'Benefit segmentation: a decision-oriented research tool', *Marketing Management*, 4(1): 59-62 (reprint of 1968 *Journal of Marketing*).
- Hardy, A. (2003). 'An investigation into the key factors necessary for the development of iconic touring routes', *Journal of Vacation Marketing*, 9(4): 314-330.
- Laws, E. & Scott, N. (2003). 'Developing new tourism services: Dinosaurs, a new drive tourism resource for remote regions?' *Journal of Vacation Marketing*, 9(4): 368-380.
- Little, D.E., Lloyd, K. & Schmidt, C. (2005). 'Get Up and Get Moving: Programming to support women's physical activity participation', *Australasian Parks and Leisure*, 8(4): 26-33.
- Minhas, R.S. & Jacobs, E.M. (1996). 'Benefit segmentation by factor analysis: an improved method of targeting customers for financial services', *International Journal of Bank Marketing*, 14(3): 3-13.
- National Centre for Tourism (2001). *Overlander's Way Corridor Management Plan Field Trip and Audit Report*. Tourism Queensland, Brisbane.
- Oliver, R.L. (1997). *Satisfaction: A behavioral perspective on the consumer*, McGraw-Hill, Boston.
- Olsen, M. (2002). 'Keeping Track of the Self-drive Market', in D. Carson, I. Waller & N. Scott (Eds), *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing, Victoria, pp.11-24.
- Olsen, M. (2003). 'Tourism themed routes: A Queensland perspective', *Journal of Vacation Marketing*, 9(4): 331-341.
- Parfitt, N. (1997). 'Developing the Drive Market in Capricorn and Gladstone', unpublished research prepared for Tourism Queensland, cited in D. Carson, I. Waller & N. Scott (Eds), *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing, Victoria, p.12.
- Prideaux, B. & Carson, D. (2003). 'A framework for increasing understanding of self-drive tourism markets', *Journal of Vacation Marketing*, 9(4): 307-313.
- Reichheld, F.F. (2003). 'The One Number You Need to Grow', *Harvard Business Review*, December: 46-53.
- Rundle-Thiele, S. (2005). 'Exploring loyal qualities: assessing survey-based loyalty', *Journal of Services Marketing*, 19(7): 492-500.
- Rust, R.T. & Oliver, R.L. (2000). 'Should we delight the Customer?' *Journal of the Academy of Marketing Science*, 28(1): 86-94.
- Sivijis, A. (2003). 'The Drive Tourism Program 2000-2002: Project partners in the fast lane', *Journal of Vacation Marketing*, 9(4): 342-353.
- Taylor, Nelson & Sofres (2001). 'Strategic Insights into the over 50s Motoring Holiday Market', unpublished research prepared for Tourism Queensland cited in: D. Carson, I. Waller & N. Scott (Eds), *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing, Victoria, pp.13.

- Trimble, K. (1999). 'Distribution System Analysis: Stage Two – Motoring and Touring', unpublished research prepared for Tourism Queensland cited in: D. Carson, I. Waller & N. Scott (Eds), *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing, Victoria, p.13.
- Verma, H. (2003). 'Customer outrage and delight', *Journal of Services Research*, 3(1): 119-133.
- Voss, C.A., Roth, A.V., Rosenzweig, E.D., Blackmon, K. & Chase, R.B. (2004). 'A Tale of Two Countries' Conservatism, Service Quality, and Feedback on Customer Satisfaction', *Journal of Service research*, 6(3): 212-230.
- Wong, A. (2004). 'The role of emotional satisfaction in service encounters', *Managing Service Quality*, 14(5): 365-376.
- Yann, Campbell, Hoare & Wheeler (1999). 'Road Travellers Study – Research Report', unpublished research prepared for Tourism Queensland, cited in D. Carson, I. Waller & N. Scott (Eds), *Drive Tourism: Up the wall and around the bend*, Common Ground Publishing, Victoria, p.15.
- Zeithaml, V.A., Bitner, M. J. & Gremler, D.D. (2006). *Services Marketing: Integrating Customer Focus Across the Firm*, 4th edn, McGraw-Hill, New York.

AUTHORS

Associate Professor Gary Howat

Gary Howat's research interests include service quality and customer behaviour in sport and leisure contexts, with a number of articles in international sports and leisure management journals. He has obtained grants to investigate aspects of customer behaviour in sport and leisure services, including an ARC Collaborative Research Grant. In addition to journal publications investigating service quality, satisfaction and customer behaviour in sports and leisure contexts, Gary has overseen numerous technical reports for industry collaborators, and information from his service quality and customer behaviour research has been disseminated widely to the industry. Gary has conducted workshops, seminars and conference presentations throughout Australia, New Zealand, Taiwan and England, as well as presentations at international conferences (e.g. in the United States and Sweden). Email: gary.howat@unisa.edu.au

Professor Graham Brown

Graham Brown has an international reputation in tourism and has published widely on tourism marketing and planning in leading journals such as *Annals of Tourism Research*, *Tourism Management* and the *Journal of Travel Research*. In 2003, he established the South Australia Centre for Tourism, a collaborative venture between UniSA, Flinders University, South Australia TAFE, the South Australia Tourism Commission and the South Australia Tourism Alliance. He is a member of the State Government's Tourism Round Table. Projects related to tourism experiences at events features prominently as another area of research interest. He has extensive experience of survey research with projects conducted at important tourist sites such as Cape Byron and at major events including the Sydney Olympic Games. The latter was conducted on behalf of the Australian Tourist Commission and Olympic sponsors such as Visa International. Email: graham.brown@unisa.edu.au

Heather March

Heather March is a research assistant with the Division of Business at UniSA. Email: Heather.March@unisa.edu.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.

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.

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.

Sustainable Tourism Cooperative Research Centre



DARWIN
NT Coordinator
 Ms Alicia Boyle
 Tel: + 61 8 8946 7267
 alicia.boyle@ecu.edu.au

PERTH
WA Coordinator
 Dr Jeremy Northcote
 Tel: + 61 8 6304 2307
 j.northcote@ecu.edu.au

ADELAIDE
SA Coordinator
 Gary Crilley
 Tel: +61 8 8302 5163
 gary.crilley@unisa.edu.au

MELBOURNE
VIC Coordinator
 A/Prof Sue Beeton
 Tel: +61 3 9479 3500
 s.beeton@latrobe.edu.au

HOBART
TAS Coordinator
 Adjunct Prof Malcolm Wells
 Tel: + 61 3 6226 7686
 Malcolm.Wells@utas.edu.au

CAIRNS
NQ Coordinator
 Prof Bruce Prideaux
 Tel: +61 7 4042 1039
 bruce.prideaux@jcu.edu.au

BRISBANE
SE QLD Coordinator
 Mr Noel Scott
 Tel: +61 7 3381 1024
 noel.scott@uq.edu.au

LISMORE
NSW Coordinator
Regional Tourism Research
 Dr Jeremy Buultjens
 Tel: +61 2 6620 3382
 jbuultje@scu.edu.au

SYDNEY
Sustainable Destinations
 Mr Ray Spurr
 Tel: +61 2 9385 1600
 r.spurr@unsw.edu.au

CANBERRA
ACT Coordinator
 Dr Brent Ritchie
 Tel: +61 2 6201 5016
 Brent.Ritchie@canberra.edu.au



NATIONAL NETWORK

INDUSTRY PARTNERS



UNIVERSITY PARTNERS



SPIN-OFF COMPANIES



CRC for Sustainable Tourism Pty Ltd
 ABN 53 077 407 286
 PMB 50 Gold Coast MC
 Queensland 9726 Australia
 Telephone: +61 7 5552 8172
 Facsimile: +61 7 5552 8171
 Chairman: Sir Frank Moore AO
 Chief Executive: Prof Terry De Lacy
 Director of Research: Prof Leo Jago
 Website: www.crctourism.com.au
 Bookshop: www.crctourism.com.au/bookshop
 Email: info@crctourism.com.au

