

SOUTHERN AUSTRALIAN TOURING ROUTE INC.

**Tourists' Perceptions of the
Melbourne to Adelaide and
Kangaroo Island Drive Routes**

Supplementary Report - 'Other' Routes

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Section 1:

Executive Assessment and Recommendations

This supplementary report prepared by the Centre for Tourism & Leisure Management, University of South Australia provides a summary of the findings for the Melbourne Adelaide 'other' routes examined in this research (Table 5). While respondents were asked to evaluate these sections of the drive route (summary presented in this report), many of them travelled beyond the route they evaluated and also visited other areas such as Kangaroo Island. The report complements the Final Summary Report that provides an overview of the aggregated data from the combined Melbourne to Adelaide and Kangaroo Island drive routes

1.1 Background to the research

Introduction

Self-drive tourism features as part of 70 per cent of all domestic holiday trips taken by Australians and, in 2000, 4 million visitors to South Australia were self drive tourists; an increase of 13 per cent since 1998. The adjoining states of Victoria and New South Wales generated 13 million and 18 million self-drive tourists, respectively (Bureau of Tourism Research, 2000).

The significance of self-drive activity led to the establishment of a Drive Tourism Program (2000-2002) in Queensland. It involved a partnership between the Queensland Heritage Trails Network, the Department of Main Roads and Tourism Queensland and sought to stimulate the State's rural and regional tourism industry.

The National Visitor Survey (June 2006) revealed that by 2005/06, Queensland accounted for 30 percent of the touring car market. New South Wales accounted for 46 percent, Victoria for 26 percent and both South Australia and West Australia accounted for 10 percent (Tourism Australia, 2007). The survey found that 56 percent of all touring trips by car were interstate and had an average duration of 10 nights. The average spend per person on a touring holiday was \$1,155 which is almost double the average domestic leisure spend of \$567, making the domestic drive tourism market worth \$5 billion (Tourism Australia, 2007).

In this context, the dearth of research on drive tourism in Australia (Carson, Waller & Scott, 2002) is surprising. A greater understanding of tourist motives and the factors that influence satisfaction with the self-drive experience offers considerable scope for product development and more effective marketing strategies.

1.2 Research objectives

The study described in this report was commissioned by Southern Australia Touring Route Incorporated (SATR), which sought market information about self-drive tourists travelling between Melbourne and Adelaide. This information was required to assist in route planning, product packaging and infrastructure development. The primary objectives were to gain a greater understanding of:

- the most popular travel routes within the Melbourne Adelaide journey;
- the most and least enjoyable aspects of the journey;
- trip preparation/pre purchase/ booking activity.

1.3 Methodology

The sample

This report presents the findings from 185 respondents who had driven on the Melbourne Adelaide 'other' routes. These data are also included in the 803 completed questionnaires from respondents who had travelled on either of the designated Melbourne to Adelaide or Kangaroo Island drive routes, which are reported in the Final Summary Report. The survey was conducted between November 2006 and August 2007. Some of the sample received the questionnaires (Appendix 7, in Final Summary Report) at sites en route (four Visitor Information Centres [VICs], the Cape Jervis Terminal, and two motor inns), while others received them by mail. The names and addresses of the latter were taken from databases of people who had requested route information from Sealink travel Group / TravelLink Ltd. All completed questionnaires were returned by reply paid post. The names of respondents were entered in a prize draw to encourage completion. A separate envelope containing personal details was used to ensure respondent confidentiality.

The instrument

The questionnaire consisted of eight sections:

- (1) Respondent characteristics
- (2) Travel route identification
- (3) Respondents' travel behaviour on the travel route
- (4) Overall satisfaction and behavioural intentions (willingness to recommend and intention to revisit)
- (5) Importance and satisfaction ratings of key features of the travel route
- (6) Benefits sought and attained from the travel route
- (7) Activities involved in on the route
- (8) Travel planning.

Constructs underpinning the research

Customer loyalty

Customer loyalty is the level of continuity in the customer's relationship with a brand or service provider (Soderlund, 2006). The behavioral view of loyalty includes repeat purchasing or frequency of attendance (Pritchard et al., 1992), and the duration of the customer-service provider relationship (Soderlund, 2006). The attitudinal view of loyalty includes two major indicators of customer retention – customers' intention to

repurchase (or revisit), and their willingness to recommend the service to other prospective customers (word-of-mouth advocacy) (Rundle-Thiele, 2005; Voss et al., 2004; Zeithaml et al., 2006).

Benefits

Push and pull factors help explain the motivations for travel (eg Crompton, 1979; Dann, 1977; Goosens, 2000). Push or internal factors reflect the benefits that travellers seek. Accordingly, motivations to travel reflect a desire to satisfy push factors. Push factors most widely reported in travel research include knowledge seeking, relaxation, and family togetherness (Jang & Wu, 2006). The most commonly reported push factors for senior travellers were education/learning, rest/relaxation, physical exercise/fitness, social interaction/ visiting friends and relatives (Horneman et al., 2003) as well as nostalgia, and excitement (Fleischer & Pizam, 2002). Push factors tend to precede pull factors. The motivation to satisfy push desires is likely to prompt the prospective traveller to consider pull factors that help identify desired destinations. Frequently cited pull factors include: the natural environment, the historic environment, cost, facilities, safety and access (Jang & Wu, 2006).

Service quality

Service quality is a consequence of the customer's evaluation of the perceived performance of specific attributes (features) of the service (eg travel route) compared to their prior expectations (Parasuraman et al., 1988; Zeithaml et al., 2006). Service quality as an antecedent to overall satisfaction appears to be mainly a customer's cognitive evaluation of a service provider's performance (Brady & Cronin, 2001; Cronin, 2003). A relatively small number of high priority attributes tend to have a dominant influence on the customer's perception of a service's overall quality (Hartline et al., 2003).

Overall satisfaction

While service quality is a measure of the service provider's output, satisfaction tends to be a measure of the customer's outcome (Baker & Crompton, 2000). Satisfaction appears to be a combination of emotional and cognitive responses (Cronin, 2003; Oliver, 1997; Wong, 2004; Zeithaml et al., 2006). As a global measure, overall satisfaction can be considered as a post-service evaluative judgment that is reflected in the customer's overall feelings toward that service (Choi & Chu, 2001) which have built up over time.

1.4 Executive summary and recommendations

The main findings and recommendations that emerge from the specific results for the Melbourne Adelaide 'other' drive routes examined in this research include:

- The **respondent profile** included a majority of people over **50 years of age** (60%) and a high percentage (32%) was **retired**. The following travel behaviour has implications for local services (accommodation and vehicle support especially):
 - Most respondents travelled by **private car** (80%)
 - Almost a quarter (25%) **towed a caravan or camping trailer**
 - The major accommodation used on the trip was either **caravan park** (44%) or **motel/motor inn** (27%).

- The average number of **nights away from home** was 19 nights with a general trend of more nights away according to distance from home. Overseas travellers' averaged 32 nights away from home on this trip.

- Aspects of the trip that respondents enjoyed the most included **scenery, nature and the natural environment** (eg the Naracoorte Caves, Great Ocean Road scenery, the 12 Apostles, Coorong, and Apollo Bay), and **interesting towns and attractions** (eg Robe, Mt Gambier, Victor Harbor, Hahndorf, maritime attractions, KI, Otway Fly Tree Top Walk). Many of these are included in the list of most frequently visited attractions by respondents (Table 23).

- **Product development** should recognise that the most sought after **benefits** from the drive trip centred on **enjoying the scenery, discovering and exploring new places, experiencing nature and the natural environment, and visiting interesting towns and attractions**.

- Of all the benefits attained, **visiting interesting attractions** had the most significant link to respondents' **willingness to recommend** these routes.

- **Discovering & exploring new places** had the most significant link to the respondents' **overall satisfaction**.

- The high level of **overall satisfaction** (94%) with the drive route experiences is reflected in the finding that almost all respondents (99%) were **willing to recommend** the drive route they travelled to others.
- Those travelling from greater distances (e.g. overseas, Queensland) reported high levels of recommending the route but were less likely to return themselves.
- **Overall satisfaction** and **willingness to recommend** a drive route is influenced by **problems** encountered on the trip. Some respondents (37%) experienced problems on their trip and these tended to be with **road signage to attractions, facilities at rest stops**, and **road signage to towns**.
- Positive features of the routes included **places of interest en route, accommodation en route**, and **visitor information centres, tourist information en route**, and the **quality of the roads**.
- Of the ten drive route features (satisfaction), **places of interest en route** had the most significant link to respondents' willingness to recommend these routes.
- People who stop en route place high importance on **walking** and **bushwalking**, and **enjoying local products** (food, drink, handicrafts etc).
- Several activities were of only moderate importance but registered relatively higher levels of satisfaction including **visiting arts & cultural galleries**, and **wine tasting**.
- The **internet** was the most popular source of information used in planning for the trip recording high use by respondents from each state and overseas. **SA Tourism, local visitor information centres**, and **Travellink** or **Sealink** also received high use by respondents from each state and overseas.
- **Travel route planning** was the main use for this information.
- The average **total trip length** was 19 nights and travellers from further away (NSW/ACT, Queensland and overseas) tended to be on 'extended' trips in excess of 32 days average.

- The most popular location for overnight stopovers en route included **Mt Gambier, Robe, Port Fairy, Apollo Bay, Victor Harbor, and Naracoorte**. Other popular locations included **Warrnambool, Pt Campbell, Portland, Kingscote, Halls Gap and Lorne**.

Section 2:

Results and Discussion

2.1 Respondent characteristics

The main home location of respondents who travelled on the Melbourne Adelaide 'other' routes (Table 1) was Victoria (43%) or NSW/ACT (20%) with similar numbers from SA (12%), Queensland (10%) and overseas (9%). The respondent profile included a majority (60%) over 50 years of age (Table 2) and few were aged less than 30 years (10%).

Table 1: State of residence

State	Percent
Victoria	43
NSW/ACT	20
SA	12
Queensland	10
Overseas	9
WA	4
Tasmania	2
NT	1
Total	101

Due to rounding some totals may not = 100

Table 2: Age groups

Age	Percent
15-19 yrs	1
20-24 yrs	2
25-29 yrs	7
30-34 yrs	3
35-39 yrs	8
40-44 yrs	6
45-49 yrs	13
50-54 yrs	9
55-59 yrs	15
60-64 yrs	14
65-69 yrs	12
70 yrs and over	10
Total	100

The main occupation groups (Table 3) were 'professional' (26%), 'manager or administrator' (8%) and 'retired' respondents (32%). Similar numbers of males (53%) and females completed questionnaires (Table 4).

Table 3: Occupation

Occupation	Percent
Retired	32
Professional	26
Manager or administrator	8
Other	10
Clerical or services or sales	7
Home duties	8
Trades person	7
Production or transport worker, or labourer	2
Total	100

Table 4: Gender

Gender	Percent
Male	53
Female	47
Total	101

2.2 Travel route identification

Respondents marked their route on a map in the questionnaire (Figure 1) and the ‘other’ routes between Melbourne and Adelaide included completed questionnaires from 185 (23%) of the 803 respondents. The ‘other’ routes (Table 5) are a combination of inland and coastal trips (Table 5).

Figure 1: Drive route map



Table 5: Travel route

Travel route	Percent	n
3. Coastal Victoria and inland (mainly in SA)	6	44
4. Inland Victoria and coastal (mainly in SA)	5	42
5. Coastal one way and inland return trip	6	50
7. Other combinations of routes 3 to 5	6	49
Total	23	185

It is noteworthy that a large majority of respondents (75%) had never previously travelled on this route (Table 6).

Table 6: Travelled this route previously

	Percent
No	75
Yes	25
Total	100

2.3 Respondents' travel behaviour on the travel route

The predominant travel groups (Table 7) were with a partner (66%) or family members (24%), and over half (52%) of the respondents shared the driving role (Table 8).

Table 7: Travel group

Travelling group	Percent
With a partner	66
With family members	24
With friends	7
Alone	3
Other	1
Total	101

Table 8: Driving role

Driving role	Percent
Shared driving role	52
Sole driver	31
Passenger	17
Total	100

Most respondents (80%) travelled by private car (Table 9) or rented car (9%). Almost a quarter (22%) towed a caravan or camping trailer (Table 10), but few (5%) were accompanied by pets (Table 11).

Table 8: Type of vehicle

Type of vehicle	Percent
Private car	80
Rented car	9
Private camper	4
Rented camper	4
Other	2
Total	99

Table 10: Towed a caravan or camping trailer

Towed a caravan or camping trailer	Percent
Yes	22
No	78
Total	100

Table 11: Accompanied by pets on the trip

Pets on the trip	Percent
Yes	5
No	95
Total	100

On this trip almost half of the respondents stayed away from home for between 10 and 29 nights (Table 12). The average number of nights away from home was 19 nights (Table 13), with a general trend of more nights away according to distance from home. In contrast to Queensland and overseas travellers' average 32 nights away from home, SA respondents averaged only 10 nights away from home on this trip (Table 13). Travelling groups composed of partners spent the greatest numbers of nights away (22) compared to other groups (Table 14).

Table 12: Number of nights away from home on this trip

Number of nights away from home	Percent
1-3	5
4-6	17
7-9	16
10-19	31
20-29	13
30-49	9
50 and over	7
Total	98

Table 13: Average number of nights away from home on this trip, by home location

Home location	Mean number of nights away
Overseas	32
Queensland	32
WA	27
NSW/ACT	26
Victoria	11
SA	10
Overall mean	19

Table 14: Average number of nights away from home on this trip, by travelling group

Travelling group	Mean number of nights away
With a partner	22
With family members	15
With friends	10
Alone	10
Overall mean	19

The major accommodation used on the trip (Table 15) was either caravan park (44%) or motel/motor inn (27%). Few people stayed in a hotel or resort (6%) or with friends or family (3%).

Table 15: Type of accommodation

Accommodation	Percent
Caravan park	44
Motel or motor inn	27
Camping	7
Hotel or resort	6
Bed and breakfast or guest house	6
Apartment or rented house	5
With friends or family	3
Hostel	2
Total	100

More of the respondents travelled during summer, followed by autumn and spring with fewer in winter (Table 16).

Table 16: Month of travel

Month of travel	Percent
Jan	16
Feb	12
March	17
April	8
May	5
June	1
July	3
Aug	2
Sept	4
Oct	11
Nov	9
Dec	14
Total	102

2.4 Overall satisfaction and behavioural intentions

Tourist activities (eg self-drive travel) as for many other services tend to be discretionary in that customers choose to participate. Accordingly, feedback from customers that includes such measures as willingness to recommend and intention to participate in that activity in the future are indicators of a customer's likely future behaviour toward that service.

Furthermore, because satisfaction is often considered as an antecedent to customers' future intentions (eg willingness to recommend) (Wong, 2004; Cronin, 2003; Oliver, 1997), measuring overall satisfaction should indicate future support for that service. As a global measure, overall satisfaction is 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 et al., 2005).

Table 17: Overall satisfaction with this specific trip

Overall satisfaction	Percent
Very Satisfied	45
Fairly satisfied	49
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	1
Very dissatisfied	3
Total	100

A high percentage of respondents were 'very satisfied' (45 %) or 'fairly satisfied' (49 %) with their experience on the these drive routes (Table 17), with an overall mean of 4.3, out of a maximum of 5. The very positive overall satisfaction ratings support the results for willingness to recommend the specific route to others, with a majority of respondents recording that they would 'definitely' recommend (69%) or 'probably' recommend (30%) the specific route they travelled (Table 18). Consequently, the relatively positive feedback for overall satisfaction and willingness to recommend this trip to others indicates that the respondents are likely to provide word of mouth promotion to encourage friends and relatives to consider a future drive-trip on these routes between Melbourne and Adelaide.

Table 18: Would recommend this specific route to others

Recommend route to others	Percent
Definitely would	69
Probably would	30
Unsure	2
Probably would not	0
Definitely would not	0
Total	101

Table 19: Likelihood of making another trip on this route in the next year

Likely to make another trip on this route in the next year	Percent
Definitely would	8
Probably would	29
Unsure	20
Probably would not	35
Definitely would not	8
Total	100

In contrast to the high percentage of respondents who would ‘probably’ or ‘definitely’ recommend a specific route to others (99%), only about a third (37%) indicated that they would ‘definitely’ or ‘probably’ make a drive trip on this route in the next year (Table 19).

Table 20: Likely to make another trip on this route in the next year, by home location

Home location	Mean
Victoria	3.4
SA	3.4
NSW/ACT	2.9
WA	2.7
Queensland	2.3
Overseas	1.6
Overall mean	2.9

The scale used ranged from 1 (low) to 5 (high).

The lower percentage likely to make a similar trip (37%), compared to their willingness to recommend the trip to others (99%), appears to be influenced by the cost (time, travel and accommodation) to travel from interstate or overseas. Respondents from Victoria and SA (Table 20) were more likely to make a drive trip on that route in the

next year compared to respondents whose homes were further away (overseas, Queensland, NSW, WA).

Table 21: Problems experienced on the trip

Problems experienced	Percent
No	63
Yes	37
Total	100

Almost two thirds of the respondents noted that they had not experienced a problem on their trip (Table 21) and this affected their overall satisfaction and behavioural intentions (Table 22). These findings are consistent with other service quality research where customer loyalty is more likely when no problems have been encountered (McCullough, et al., 2000; Maxham & Netemeyer, 2002; Zeithaml, et al., 2006).

Table 22: Overall satisfaction and behavioural intentions, by problems experienced

	Problems Experienced Mean	No Problems Experienced Mean	Overall mean
Overall satisfaction	4.2	4.4	4.3
Likely to make another trip on this route in the next year	2.8	3.0	2.9
Would recommend this specific route to others	4.6	4.7	4.7
	<i>n=67</i>	<i>n=116</i>	<i>n=183</i>

The scale used ranged from 1 (low) to 5 (high).

Because the overall experience for tourists like most other services will be influenced by the impact of problems they encounter, it is important to identify the nature of the problems so that they can be minimised in the future (Cronin, 2003; Johnston, 2004

Further understanding of respondents' perceptions of the travel routes can be gleaned from the results on route features (Section 2.5) and benefits to respondents (Section 2.6), with qualitative support for these findings from respondents' written comments listing aspects of the route that they enjoyed the most (Appendix 1) or had problems with (Appendix 2).

2.5 Importance and satisfaction ratings of key features of the travel route

This study examined the importance of ten travel route features compared to how satisfied respondents were with each. Most of the features were relatively important, with road signage recording the highest score for importance (Table 23). A negative gap indicates an area of concern. The lower satisfaction and resultant wider Satisfaction – Importance gaps indicate that ‘Road signage to attractions’, ‘Road signage to towns’, and ‘Facilities at rest stops’ are problems for some travellers.

Table 23: Importance and satisfaction with drive route features (means)

Travel route features	Importance Mean	Satisfaction Mean	Satisfaction – Importance Gap
Road signage to attractions	4.4	3.8	-0.6
Road signage to towns (eg. distances to towns)	4.3	3.9	-0.4
Facilities at rest stops (eg toilets)	4.3	3.7	-0.6
Places of interest en route	4.2	4.3	0.1
Accommodation you stayed at en route	4.2	4.1	-0.1
The quality of the roads	4.1	4.1	0.0
Visitor information centres	4.0	4.3	0.3
Tourist information en route	4.0	4.1	0.1
Places to buy food (& drinks) en route	3.7	3.8	0.1
Restaurants/cafes en route	3.5	3.8	0.3

The scale used ranged from 1 (low) to 5 (high).

Positive gaps reflect encouraging evaluations. Respondents felt that several features were relative strengths of the drive route including ‘Places of interest en route’, ‘Accommodation stayed at en route’, ‘The quality of the roads’, ‘Visitor information centres’ and ‘Tourist information en route’ (Table 23). Availability of food and drink en route was not a high priority but generally met the respondents’ needs.

Regression analysis indicated that of the ten drive route features (satisfaction), ‘Places of interest en route’, had the most significant link to respondents’ willingness to recommend the route, with an overall correlation co-efficient (r) of .257 and a co-efficient of determination (r^2) of .066, ($F = 12.725$, $df = 1, 181$; $p < .001$).

Qualitative information (written comments) indicating aspects of the route that respondents either enjoyed (Appendix 1) or had problems with (Appendix 2) tend to support the results presented in Table 23.

The most frequently listed problems included road signage (to attractions and to towns), and local services such as opportunities to purchase local food. A number of respondents on these routes also visited Kangaroo Island and other places additional to the routes focussed on in this supplementary report, and some made specific comments about these experiences.

Far outweighing the problems encountered on this trip were the numerous aspects of the route that respondents enjoyed the most (Appendix 1). Enjoyable aspects especially included scenery, nature and the natural environment (eg the Naracoorte Caves, Great Ocean Road scenery, the 12 Apostles, Coorong, and Apollo Bay). Also featured in the aspects enjoyed the most were interesting towns and attractions (eg Robe, Mt Gambier, Victor Harbor, Hahndorf, maritime attractions, KI, Otway Fly Tree Top Walk). Many of these are included in the list of most frequently visited attractions by respondents (Table 24), including caves, the Blue Lake, the 12 Apostles National Park, wineries, lighthouses, Seal Bay, museums, galleries and historic buildings, and the Otway Fly Tree Top walk.

Table 24: Attractions visited

Attractions	Percent of respondents who visited this attraction %
Caves (including Naracoorte caves)	34
Wineries (including Coonawarra area)	31
Blue Lake	27
12 Apostles	25
Lighthouses	20
Conservation parks	19
Museums, galleries and historic buildings	17
Seal Bay	16
Otway Fly Tree Top walk	12
Remarkable Rocks	7
Flinders Chase National Pk	7
Waterfalls	6
Granite Island	6
Grampians	5
Coonawarra wine region	5
Sovereign Hill	5
Coorong National Park	4
River Murray	2
Sorrento/Queenscliff ferry	1

Respondents were able to list more than one attraction that they visited.

2.6 Benefits sought and attained from the travel route

The numerous aspects of the route that respondents enjoyed the most (Appendix 1) also correspond with the highest rated benefits including 'Enjoying the scenery', which was also rated highest for this benefit being attained. 'Discovering & exploring new places', 'Experiencing nature & the natural environment', 'Visiting interesting attractions (& towns)', and 'Learning about this part of Australia', also rated relatively high in importance as well as for attainment of the benefit (Table 25).

Table 25: Perceived benefits to respondents (means)

Benefits	Importance Mean	Attainment Mean	Attainment - Importance Gap
Enjoying the scenery	4.5	4.5	0.0
Discovering & exploring new places	4.5	4.3	-0.2
Experiencing nature & the natural environment	4.5	4.3	-0.2
Visiting interesting attractions	4.3	4.2	-0.1
Visiting interesting towns	4.3	4.2	-0.1
Learning about this part of Australia	4.2	4.1	-0.1
Learning about nature & the natural environment	4.2	4.0	-0.2
Being able to make flexible & spontaneous decisions	4.1	3.9	-0.2
Escaping everyday routines	4.1	4.2	0.1
Relaxation	4.1	3.9	-0.2
Experiencing local history and culture	4.0	3.9	-0.1
Learning about local history and culture	4.0	3.9	-0.1
Enjoying local produce (eg food, drink, handicrafts)	3.9	3.9	0.0
Improving my health & well-being	3.7	3.8	0.1
Spending time with family &/or friends	3.6	4.1	0.5
Enjoying time to be alone	3.3	3.6	0.3
Experiencing adventure & challenge	3.3	3.4	0.1
Improving my physical fitness	3.2	3.4	0.2
Meeting new people	2.9	3.2	0.3

The scale used ranged from 1 (low) to 5 (high).

Regression analysis indicated that of the benefits attained, 'Visiting interesting attractions' had the most significant link to respondents' willingness to recommend these routes, with an overall correlation co-efficient (r) of .242. 'Discovering & exploring new places' had the most significant link to respondents' overall satisfaction ($r = .198$).

'Spending time with family and/or friends' was a higher priority ($M_i = 3.8$) that was attained to a high level by Victorian travellers ($M_a = 4.2$). A converse result was recorded for overseas respondents ($M_i = 2.9$ and $M_a = 3.7$).

In contrast, several personal benefits were not a priority for many respondents on this route. These included 'Improving my physical fitness', 'Meeting new people', and 'Experiencing adventure & challenge'.

2.7 Activities involved in on the route

Activities with wide appeal across age groups dominated in terms of both their importance as well as the extent to which respondents were satisfied with them, especially walking, consuming local food and drink, purchasing local produce, and bush walking or hiking (Table 26).

Several activities were only of moderate importance but registered relatively higher levels of satisfaction including visiting arts & cultural galleries, camping and wine tasting.

Table 26: Activities involved in on the route

Activities	Importance Mean	Satisfaction Mean	Satisfaction – Importance Gap
Walking	4.0	4.3	0.3
Consuming local food & drink	3.8	4.1	0.3
Purchasing local produce (eg food, drink, handicrafts)	3.7	4.0	0.3
Bush walking/hiking	3.5	4.1	0.6
Visiting arts & cultural galleries	3.4	3.8	0.4
Wine tasting	3.3	4.0	0.7
Bird watching	3.2	3.9	0.7
Camping	3.1	4.0	0.9
Visiting aboriginal sites & attractions	3.0	3.5	0.5
Swimming	2.8	3.7	0.9
Whale watching	2.8	3.2	0.4
Fishing	2.2	3.4	1.2
Boating	2.1	3.4	1.3
Surfing	1.8	3.0	1.2
Scuba diving/Snorkelling etc	1.8	3.2	1.4
Bicycling	1.6	3.1	1.5

The scale used ranged from 1 (low) to 5 (high).

2.8 Travel planning

The majority of respondents (68%) planned for their trip at least one month in advance and only few (7%) did not plan at all (Table 27).

Table 27: How long before the start of this trip did you start planning for it?

Length of time before start of trip	Percent
Did not plan	7
Less than a week	4
1 to 4 weeks	20
1 to 3 months	26
3 to 6 months	23
More than 6 months	19
Total	99

The internet (57%) was the most popular source of information used in planning for the trip (Table 28) recording high use by respondents from each state and overseas. SA Tourism (46%) also recorded high use by respondents from each state and overseas as did the local visitor information centres (42%). State automobile associations tended to be used mainly by respondents from that state. The high rating for Travellink or Sealink reservations may have been influenced by the number of respondents sourced from their database. The pattern of responses indicates multiple sources of information were used by many respondents.

Table 28: What sources of information did you use when planning this trip?

Sources of information used when planning this trip	All respondents %
RAA	10
RACV	27
NRMA	13
Tourism Vic	24
SA Tourism	46
Internet	57
Travellink or Sealink reservations	47
Local visitor information centre	42
None	2
Other	27

Respondents were able to nominate all sources that were appropriate to them.

Travel route planning was the main use for this information (Table 29).

Table 29: What did you use this planning for?

	All respondents %
Travel route planning	71
Sourcing information	19
Planning activities to undertake en route	5
Finding out about sites of interest en route	5
Total	101

While the minority of respondents (11%) planned for their trip less than one week in advance (Table 27), many more either did not book their accommodation (34%) or did so less than a week beforehand (19%) (Table 30).

Table 30: Time before trip accommodation was booked

	Percent
Did not book	34
Less than a week	19
1 to 4 weeks	23
1 to 3 months	14
3 to 6 months	8
More than 6 months	3
	101

Appendix 1:

Summary of written responses:

Aspects of this route that respondents enjoyed the most

Table 31: Aspects of this route that respondents enjoyed the most – Route 3 (Coastal Victoria and inland, mainly in SA)

	n=
<p>Scenery, nature & the natural environment</p> <ul style="list-style-type: none"> • Scenery on Great Ocean Road (7) • Naracoorte Caves (5) • Scenery (4) • Seeing sites unseen before • 12 Apostles • Beautiful Ocean Road scenery- rock formations • Nature-environments • The nature • Natural beauty of coastline • Variety of scenery from rainforest to coastal • Loved the coast • Rugged coastline • Coastal walk • Bush walks • Mt. Gambier's geological features • Blue Lake • 	29
<p>Animals, wildlife</p> <ul style="list-style-type: none"> • Watching the seals in the guided walk at Seal Bay 	1
<p>Local history & culture, interesting towns & attractions</p> <ul style="list-style-type: none"> • Tourist attractions (2) • Mt Gambier, Robe, Victor Harbor and KI very high satisfaction • Otway national park • Hahndorf its such a great place, very interesting • Crossing the Murray by ferry at Wellington • Victor Harbor • All of KI • Rural • Things for the kids 	10
<p>Relaxation, peace, serenity</p> <ul style="list-style-type: none"> • Quieter sections in and near National Parks/ reserves with No obvious tourist facilities/ developments/resorts • The time on KI- peaceful, good accommodation • Space 	3
<p>People, friends, relatives</p> <ul style="list-style-type: none"> • Being with family • Interesting sights to see friendly people e.g. shop & restaurant staff 	2
<p>Local produce (food, drink, handicrafts, wineries)</p> <ul style="list-style-type: none"> • Wine region 	1
<p>Roads, signage, rest stops</p> <ul style="list-style-type: none"> • Route was quick • Good quality roads • The Great Ocean Road was spectacular and amenities great • Excellent signage • Excellent roads 	5

<p>Accommodation</p> <ul style="list-style-type: none"> • The time on KI- peaceful, good accommodation • Good caravan parks maintained by local councils 	2
<p>General</p> <ul style="list-style-type: none"> • Whole experience and extremely happy and truly enjoyed our trip • All of it • Enjoyed every second of or trip, hard to pinpoint one experience • The whole experience and views. Extremely happy and truly enjoyed our trip. • Cooler climate 	5

Table 32: Aspects of this route that respondents enjoyed the most – Route 4 (Inland Victoria and coastal, mainly in SA)

	n=
<p>Scenery, nature & the natural environment</p> <ul style="list-style-type: none"> • Scenery (4) • The natural environment/attractions (3) • Coast- Adelaide to Cape Jervois • Sightseeing • Nature, plants • The coast and the Grampians • Excellent fishing on KI • Scenery on KI • Coorong • Naracoorte Caves 	15
<p>Animals, wildlife</p> <ul style="list-style-type: none"> • Birds/animals • Seal and sea lion colonies 	2
<p>Local history & culture, interesting towns & attractions</p> <ul style="list-style-type: none"> • Visiting somewhere new and learning about the history • We enjoyed area around Beachport, anywhere near water • Mt. Gambier, Victor Harbor, Kangaroo Island, Hahndorf • Robe • We also enjoy visiting old towns & country towns • KI (2) 	7
<p>Relaxation, peace, serenity</p> <ul style="list-style-type: none"> • Relaxation and browsing of the antique and collectables shop • Relaxing 	2
<p>People, friends, relatives</p>	0
<p>Local produce (food, drink, handicrafts, wineries)</p> <ul style="list-style-type: none"> • Wineries and eateries and the Great Ocean Road • Enjoyed local fresh lobster • Coonawarra wine region 	3
<p>Roads, signage, rest stops</p> <ul style="list-style-type: none"> • Smooth and well maintained roads • Good clear roads 	2
<p>Accommodation</p> <ul style="list-style-type: none"> • Excellent camping on KI 	1
<p>General</p> <ul style="list-style-type: none"> • Getting there safely • Enjoyed all the route as we have never travelled over it before • I found the whole trip fascinating & most enjoyable, well worth many more visits to lovely SA 	3

Table 33: Aspects of this route that respondents enjoyed the most – Route 5 (Coastal one way and inland return trip)

	n=
<p>Scenery, nature & the natural environment</p> <ul style="list-style-type: none"> • Great Ocean Road (6) • Scenery (5) • 12 Apostles (3) • Grampians (2) • Nature walks and caves (2) • Coorong areas/Exploring Coorong (2) • Natural attractions such as caves and lakes • South coast • Fora • Water views towards Victor Harbor • Natural beauty • Landscape and sea- swimming on KI • Exploring new places, nature • Water views • KI's natural beauty • Walks on the beach • Interesting country side • Western river cove for its beauty and remoteness • The wildlife • Murray River 	34
<p>Animals, wildlife</p> <ul style="list-style-type: none"> • Animals (3) • KI was excellent especially wildlife 	4
<p>Local history & culture, interesting towns & attractions</p> <ul style="list-style-type: none"> • KI (14) • Victor Harbor (3) • McLaren Vale areas (2) • Local history • Younghusband, pink salt lakes, Robe • Penola to Hamilton • Enjoyed the stretch between Wellington to Normanville, a quiet rural area with a number of places to stop • Visiting Adelaide • Cape Bridgewater • The old buildings in the township • Seeing new places especially on KI • Robe • Lots of stops, attractions that were free (hiking, picnics, fishing) fun for the family • Lighthouse keepers cottages on KI • Hahndorf/ McLaren vale area • Wines at Cape Jaffa/ Mt Benson district • Nelson • Interesting areas to visit • Hahndorf • Sovereign Hill 	36
<p>Relaxation, peace, serenity</p> <ul style="list-style-type: none"> • Tranquillity • Relaxing at Robe 	2

<p>People, friends, relatives</p> <ul style="list-style-type: none"> • Meeting locals 	1
<p>Local produce (food, drink, handicrafts, wineries)</p> <ul style="list-style-type: none"> • Wineries in Coonawarra • Robe/ fine food • Barossa wineries • Vineyards • Wine and cheese • Coopers • The wines • Tasting local produce 	8
<p>Roads, signage, rest stops</p> <ul style="list-style-type: none"> • Ease of driving • Very good roads • Easy drive on well signposted roads 	3
<p>General</p> <ul style="list-style-type: none"> • Love driving to Adelaide • Photographic opportunities 	2

Table 34: Aspects of this route that respondents enjoyed the most – Route 7 (Other)

<p>Scenery, nature & the natural environment</p> <ul style="list-style-type: none"> • The scenery
<p>Animals, wildlife</p> <ul style="list-style-type: none"> • The wildlife
<p>Local history & culture, interesting towns & attractions</p> <ul style="list-style-type: none"> • Historic sites
<p>Relaxation, peace, serenity</p> <ul style="list-style-type: none"> • Peace and tranquillity
<p>People, friends, relatives</p> <ul style="list-style-type: none"> • Attitude of local people in face of extreme drought
<p>Local produce (food, drink, handicrafts, wineries)</p> <ul style="list-style-type: none"> • Natural/ local produce and boutique industries
<p>Roads, signage, rest stops</p> <ul style="list-style-type: none"> • KI- we knew about the dirt roads & were prepared so they only added to the novelty of the experience
<p>Accommodation</p> <ul style="list-style-type: none"> • The excellent western KI caravan park- gorgeous place, very clean, friendly staff
<p>General</p> <ul style="list-style-type: none"> • Sense of adventure

Appendix 2:

Summary of written responses:

Problems that detracted from respondents' experience with this route

Table 35: Problems that detracted from respondents' experience with this route – Route 3 (Coastal Victoria and inland, mainly in SA)

	n=
Scenery, nature & the natural environment <ul style="list-style-type: none"> ▪ The plight of the Bool Lagoon 	1
Accommodation <ul style="list-style-type: none"> ▪ Apollo Bay motel quoted price over phone when booking, but charged \$30 more on arrival. Unable to go elsewhere ▪ Unable to go elsewhere due to time & lack of accommodation for 1 night only 	2
Quality of roads <ul style="list-style-type: none"> ▪ People speeding between Apollo Bay and Geelong ▪ Condition of roads in some parts not satisfactory ▪ The road to London Bridge was very poor ▪ Travelling after dark on KI and trying to avoid hitting wildlife on the road ▪ High density of truck transports in Penola/ Mt. Gambier region- dangerous 	5
Road signage <ul style="list-style-type: none"> ▪ Signage- got lost looking for Tantanoola caves sign points you to the town when its in fact only just up on the highway not far from the sign. Tourist signs should say-way to... and have km marked how far away attraction is. 	1
General <ul style="list-style-type: none"> ▪ Weather- wet on the coast ▪ My husband and 9 year old son were verbally abused (quite unprovoked) by a drunken schoolie in Victor Harbor 	2

Table 36: Problems that detracted from respondents' experience with this route – Route 4 (Inland Victoria and coastal, mainly in SA)

	n=
Local services (food, vehicle, information) <ul style="list-style-type: none"> ▪ Variable to poor quality food and drink 	1
Accommodation <ul style="list-style-type: none"> ▪ Not between Melbourne and Adelaide but KI needs more work on roads, accommodation 	1
Quality of roads <ul style="list-style-type: none"> ▪ The state of the roads from Robe to Taillem Bend ▪ Road conditions along route (2) ▪ Not between Melbourne and Adelaide but KI needs more work on roads, accommodation 	3
Road signage <ul style="list-style-type: none"> ▪ Sign posting to towns ▪ Very poor signage from Murray Bridge to ferry ▪ Lack of road signage in SA 	3
General <ul style="list-style-type: none"> ▪ Problems with caravan/car ▪ Would have been better to go from Melbourne-Adelaide on the Great Ocean Road not the other way (too many people) 	2

Table 37: Problems that detracted from respondents' experience with this route – Route 5 (Coastal one way and inland return trip)

	n=
Scenery, nature & the natural environment <ul style="list-style-type: none"> ▪ Mutton birds were highly disappointing and over acclaimed 	1
Local services (food, vehicle, information) <ul style="list-style-type: none"> ▪ Unexpected ferry crossing the Murray ▪ We often arrived at towns & villages at around 6 in the evening, when tourist information centres were already closed ▪ Coonawarra wineries- no tours ▪ Attractions too expensive ▪ Visitor centres should have a small exhibit not just merchandise & maps 	5
Accommodation <ul style="list-style-type: none"> ▪ Difficulty finding places to sleep ▪ Accommodation at Goolwa and Robe was very ordinary ▪ Caravan park at Hahndorf was disappointing, access to facilities were poor (toilets) ▪ Nearly missed a camp site near deep creek NP area ▪ Campgrounds close too early at night ▪ One caravan park near Rapid Bay had 1 site in a hugely overcrowded park and were demanding 2 nights minimum 	6
Quality of roads <ul style="list-style-type: none"> ▪ Road condition on Limestone Coast highway poor in parts ▪ Heavy duty trucks around Mt. Gambier 	2
Road signage <ul style="list-style-type: none"> ▪ Coming from Melbourne towards Adelaide, it was impossible to know where to turn off the main highway towards Jervois Bay, but once we did the signs were non-existent ▪ Nearly missed a camp site near deep creek NP area ▪ Signs inside National Parks were poor- especially road closures ▪ Lack of signage 	4
General <ul style="list-style-type: none"> ▪ Tourists groups, overbooked ▪ Information on ferries from Tailem Bend to go to KI ▪ Cost of ferry to KI is prohibitive. If we didn't have relations to stay with, we couldn't/wouldn't have gone ▪ Cost of ferry to KI ▪ Ferry to KI is too expensive will not go again!!!! ▪ Overcrowding at attractions ▪ Flies ▪ Vic. Bushfires' smoke 	8

Table 38: Problems that detracted from respondents' experience with this route – Route 7 (Other)

	n=
<p>Scenery, nature & the natural environment</p> <ul style="list-style-type: none"> ▪ Restrictions at Grampians due to previous fire ▪ Bool Lagoon was dry and disappointing and finding out about fees prior to arrival would have been good ▪ Inland trip very boring ▪ The continuing drought- lakes etc dry and no waterbirds,- dirt/ gravel roads hard to maintain 	4
<p>Local services (food, vehicle, information)</p> <ul style="list-style-type: none"> ▪ Not enough dump spots (sewer for caravans) ▪ Not adequate gas/petrol stations around ▪ The cost and availability of basic facilities (nil/ few). Cheap or free campsites with very simple facilities (level ground, a bin, a toilet) ▪ Cost of fuel in Victoria was up to 50 cents (in out of the way places) More than in Tasmania- where they have to ship it in. Melbourne was 13 cents per litre more than Davenport. Apollo Bay was 21 cents per litre more! How come? ▪ More education/museums en route for kids entertainment ▪ Lack of information at rock art sites ▪ Some small towns with one supermarket overcharge for staples like bread rolls & milk ▪ Lack of local produce testing or location signage (except wineries) ▪ Brochure on tour times at Naracoorte caves was incorrect for Alexandra cave. ▪ Information on snorkelling at Piccaninnie Pond poor 	10
<p>Accommodation</p> <ul style="list-style-type: none"> ▪ Not enough free camping areas with flush toilets ▪ Not being able to camp on side on side of road ▪ Why aren't there any free camp sites, south oz is better ▪ Taillem Bend CP was substandard ▪ We spent money on diesel, food restaurants, attractions etc & shouldn't be forced to spend the night in a caravan park which are already overcrowded & often noisy 	5
<p>Quality of roads</p> <ul style="list-style-type: none"> ▪ Bad drivers- tourists that don't pull off the road properly ▪ Just some sections of road are in very bad condition and need widening ▪ Traffic congestion on Geelong freeway on Australia day- crawling pace ▪ Some sections of the Great Ocean Road in bad condition ▪ The route was slow & difficult to follow in the Victor Harbor area 	5
<p>Road signage</p> <ul style="list-style-type: none"> ▪ Occasional difficulty parking with a trailer- no signed areas ▪ Lack of road signage (safety and distances, mainly in SA) ▪ Lack of local produce testing or location signage (except wineries) ▪ Some signposting inconsistent 	4
<p>General</p> <ul style="list-style-type: none"> ▪ Driving home problems with trailer wheel was 'fixed' by RACV touring. One wheel hub was not tightened properly and we had to stop to tighten it ourselves ▪ Inability to fish because of windy and cool weather of accessible areas for beach fishing ▪ Conflict with other passengers in regard to stops and accommodation ▪ Price of the ferry to and from KI ▪ Considered the ferry costs to be expensive 	5

Appendix 3:

En route locations for overnight stopovers

Table 39: En route locations for overnight stopovers

Stop over	Percent of 'other' route respondents who stayed overnight at this location
Mt Gambier	27
Robe	22
Adelaide	19
Apollo Bay	17
Victor Harbor	17
Pt Fairy	16
Naracoorte	15
Kingscote	14
Warrnambool	13
Halls Gap	9
Portland	8
Pt Campbell	8
Lorne	7
Penneshaw	6
Goolwa	5
Hamilton	5
Geelong	4
Penola	4
Tailem Bend	4
Beachport	3
Coorong National Pk	3
McLaren Vale	3
Torquay	3
Vivonne Bay	3
Anglesea	2
Coonawarra Region	2
Emu Bay	2
Meningie	2
Otway	2
Pt MacDonnell	2

The most popular location for overnight stopovers en route included Mt Gambier, Robe, Port Fairy, Apollo Bay, Victor Harbor, and Naracoorte (Table 39). These stopovers were nominated by the respondents (n=185) on these routes and excluded starting points or destinations beyond Melbourne and Adelaide.