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A framework for increasing understanding of self-drive tourism markets

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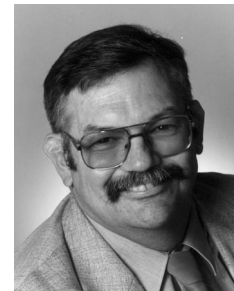
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ABSTRACT

KEYWORDS: transport choices, size of drive tourism market, drive market characteristics, case study framework

This paper aims to identify a framework for analysis of case study research into self-drive tourism and its associated markets. The history and significance of drive tourism markets around the world are briefly identified, and statistics are provided to support increased attention being paid to these markets. The lack of existing research is identified, with significant recent exceptions being this special issue of the *Journal of Vacation Marketing* and a collection of articles edited as a book by Carson et al.¹ In order to gain greater understanding of the diversity of self-drive tourism markets and their behaviour in destinations, the framework for analysis suggests attention be paid to location

(destination) description; visitor characteristics; access, including distance aspects; nature of visitor flows; expenditure patterns; attractions; accommodation; promotion; history; investment; physical infrastructure; cooperation between stakeholders; level of public sector involvement; and economic impacts and innovation.



INTRODUCTION

The inauguration of the first regular rail passenger services in 1825 by the Stockton and Darlington Railway Company in the UK opened up large parts of the countryside to mass travel. Henry Ford's innovative mass automobile production techniques continued the land transport revolution, enabling travellers to go to those places still inaccessible by rail and freeing land travellers from the constraints of railway timetables and limited network options. Later, air travel was to complete the travel revolution, allowing humanity to visit almost any part of the globe. While air travel superseded rail and road travel in the long-haul sector, the car has become the preferred mode of transport for short-distance travel in many developed countries. The tourism industry has benefited enormously from the car's ability to provide almost unrestricted land travel and in developed nations a significant proportion



of domestic travellers utilise cars as their main form of holiday transport. In Australia, for example, the Bureau of Tourism Research² reported that 70 per cent of all trips are undertaken by car. The tourism industry has responded to this preference for car travel by developing new forms of accommodation, typified by caravan parks and motels, and investing in tourism attractions located away from major urban centres. Governments have also invested considerable funds in building and maintaining roads and associated infrastructure, funding non-urban attractions and supporting promotional activities by a range of destination marketing organisations (DMOs), state tourism offices (STOs) and regional tourism associations (RTAs).

Until recently, researchers have paid relatively little attention to drive tourism research. This is surprising given the significance of the drive tourism sector in terms of its size, its popularity, the resources allocated to drive tourism infrastructure and its impact on regional tourism. In recent research Carson *et al.*³ edited a timely collection of chapters on a range of drive tourism issues in Australia, and in the most recent initiative the *Journal of Vacation Marketing* devotes this special issue to the topic. In the future, and as the popularity of drive tourism continues to grow, there will need to be ongoing research in this field.

This paper aims to draw together many of the major issues relating to drive tourism outlined in this special issue and suggest possible future research agendas. One aspect of current research is the extensive use made of case studies as an analytical tool for drive tourism research. For example, in Carson *et al.*⁴ two-thirds of the contributed chapters utilised case studies as a major or even primary research methodology. A similar observation can be made about this special issue of the *Journal of Vacation Marketing*, where virtually all papers utilised case studies. Unfortunately the lack of conventions governing the use of case studies as an analytical tool precludes potentially useful comparison between case studies. To redress this deficiency in the literature this paper

will suggest a simple analytical framework that may be employed as a method for comparing aspects of drive tourism.

LITERATURE REVIEW

Many of the recent published papers reporting on drive tourism issues have focused on drive tourism routes or regions attracting drive tourists,⁵ while a second group of papers have focused on the consumers of drive tourism experiences and market segments.⁶ Researchers have focused on a diversity of issues including policy,⁷ the role of drive tourism in regional development,⁸ consumer aspects,⁹ signage,¹⁰ economic aspects¹¹ and safety.¹²

Other studies have focused on issues that affect drive tourism, including the value of travel time,¹³ mode characteristics,¹⁴ estimates of consumer surplus¹⁵ and the opportunity cost of various modes of transport.¹⁶ The measurement of travel characteristics and their effect on travel decisions have been reported by Coto-Millan *et al.*,¹⁷ Hensher¹⁸ and Mayeres *et al.*¹⁹ There are also a number of unpublished reports, including some identified by Olsen²⁰ that have also reported on aspects of drive tourism.

CHARACTERISTICS OF DRIVE TOURISM

It is useful to re-examine the definitions and major characteristics of drive tourism suggested in the literature. For example, Priedeaux *et al.*²¹ described drive tourism in a broad interpretation as 'tourism that centres on travelling from an origin point to a destination by car that is either privately owned or rented, and engaging in tourism-related activities during the journey'. More recently, Olsen²² added a time element, defining drive tourism as 'Travelling away from home for at least one night, on holidays or visiting friends and relatives, in their own, a rented or borrowed vehicle as the primary mode of transport.' Olsen further narrowed this view of drive tourism by suggesting that drive tourists do not represent a

homogeneous group of people, although they do share some common characteristics.

In an unpublished report written for Tourism Queensland (TQ) by consultants Yann Campbell Hoare Wheeler²³ three segments based on travel behaviour were identified. The first segment described drive tourists who stopped where they pleased and was classed as 'a touring segment'. Tourists who break the journey at some point were described as the 'A to B with stops segment', while the final category of tourists who drive to their destination without stopping were classed as the 'A to B segment'. Carr²⁴ observed that 'people take drive holidays to capture a sense of freedom or independence, and regard themselves as "travellers" rather than "tourists".' Other characteristics included length of stay away from home,²⁵ the infrastructure that services the drive tourism industry²⁶ and the structure of iconic routes (as discussed by Anne Hardy in this issue of *JVM*).

A major aspect of drive tourism is its individuality and lack of rigidity compared to the conformity of a package tour. Compared to a typical mass tourism product a traveller on a drive tour is not necessarily confined by location, selection of activity or timetables. It is the freedom of drive tourists to make and change their itinerary that is a distinguishing factor of drive tourism. Moreover, participants in drive tourism have a greater selection of localities and can decide on the time allocated to specific activities as well as selecting and substituting attractions.

Drive tours and drive tourism can also be differentiated by a range of factors, including the activity engaged in, the itinerary (structure, unstructured), the type of vehicle (conventional, off-road), accommodation type used (motel, camping, caravanning, bed and breakfast), length of time away from home, length of journey, types of activities and attractions visited and age of participants.

THE SIGNIFICANCE OF DRIVE TOURISM

Carson and Waller²⁷ reported on the significance of self-drive forms of transport for

domestic and international visitors to Australia. In particular, they emphasised the role self-drive tourism plays in visitation to regional areas, where alternative transport options may be limited. For international visitors to Australia in 1999, over 50 per cent who visited at least one regional centre used self-drive modes of transport at some point in their journey, compared with 40 per cent of those who did not visit regional Australia. For domestic tourists, the rates were 86 per cent and 62 per cent respectively. Importantly, irrespective of destination, self-drive transport was the most common transport item for all visitors to Australia.

In this special issue of *Journal of Vacation Marketing*, Lori Pennington-Gray identifies similar rates of self-drive tourism for visitors to the USA. The World Tourism Organisation²⁸ described the predominance of air and self-drive transport internationally. In 1998 air transport represented 43 per cent of all transport choices for international tourists worldwide, while self-drive accounted for 42 per cent of transport choices. Air transport was more popular in Africa, the Americas and Asia, while self-drive transport was more popular in Europe, the Middle East and Australasia. Over three-quarters of international visitors to Austria arrive at their main destination by car,²⁹ over half of international visitors to Switzerland.³⁰ Fewer statistics are available for domestic tourists, but given the experiences of Australia³¹ and the USA it would be expected that self-drive transport is far more common than air transport for domestic tourists internationally. Many of the statistical sources indicate that self-drive tourism is more popular where there are multiple overnight destinations and a longer length of stay.³²

While there are many international agreements and policy and research institutes relating to air transport,³³ the development of services for self-drive tourists appears to have been more *ad hoc* and undertaken with less understanding of how self-drive tourists behave and the differences between self-drive segments.³⁴ This is a major deficiency in the

literature given the economic size of drive tourism, its employment potential and the role of drive tourism in regional economic development.

DEVELOPING AN ANALYTICAL FRAMEWORK

From the foregoing discussion it is apparent that there are numerous factors which affect and are affected by drive tourism. It is clear that self-drive tourism is different from other forms of tourism, as described in Table 1.³⁵ The differences make it harder to track visitors and monitor the performance of self-drive touring routes and consumer-selected itineraries over time.

To date most research has focused on specific drive tourism issues, specific forms of

drive tourism or case studies highlighting specific aspects of drive tourism. As a consequence there has been little opportunity for comparison between factors and localities either locally, regionally or nationally. Drawing on previous research as well as field observation this paper proposes an analytical framework of drive tourism that has sufficient flexibility to be used as the basis for case study research both on a comparative basis between individual or groups of factors and longitudinally over time. Table 2 draws on existing research and author observations to develop an analytical framework that places principal characteristics on the left and factors which impact on these characteristics on the right. Case studies can utilise individual, some or all of these characteristics and

Table 1: Generic characteristics of transport modes

<i>Mode</i>	<i>Characteristics</i>
Road (private car, rental/hire car, taxi, bicycle, foot/other self-propelled, bus/coach)	Relatively slow Small carrying capacity Generally high comfort Flexible itinerary (excluding bus/coach) Variety of distances Relatively low cost Relatively poor safety
Rail	Relatively slow Large carrying capacity Variable comfort Rigid itinerary Variety of distances Relatively low cost High safety
Sea (cruise, ferry, private craft)	Slow Variable carrying capacity Relative comfort Variety of itinerary options Variety of distances Relatively high cost Relatively high safety
Air	Fast Large carrying capacity Limited comfort Rigid itinerary Longer distances High cost High safety

factors to compare between case studies in any sequence of characteristics. In many cases there will be a degree of overlap between characteristics as well as between factors. Public and private sector factors are one example where this may apply for a number of characteristics, including investment, stakeholders and promotion. Moreover, the list of factors is comprehensive but not exhaustive.

The contributions to this special issue of the *Journal of Vacation Marketing* can be reviewed against elements of the framework. All papers consider location and visitor characteristics. Anne Hardy is primarily concerned with history, visitor flows and promotion. Both Mark Olsen and Andrew Sivijis look at the historical development of themed touring routes in Queensland, Aus-

tralia, and consider investment, infrastructure and economic impacts. Specific visitor characteristics and comparative economic impacts feature in the paper by Lori Pennington-Gray. Eric Laws and Noel Scott are concerned with the role of attractions, implications for infrastructure and public sector involvement (through both investment and resource management). Kevin Shanahan examines accommodation and begins to link physical infrastructure and promotion to the nature of visitor flows.

CONCLUSIONS

It is apparent that there is considerable scope for future research into drive tourism based on its potential economic impact, particularly in rural and regional settings, the size of

Table 2: A comparative drive tourism framework

<i>Characteristic</i>	<i>Factors</i>
Location description	Urban area, rural area, themed route, site, attractions
Visitor characteristics	Number, length of stay, spending, market segments, age, income
Access, including distance aspects	Close to city, affected by peripheral location, modal characteristic, travel times
Nature of visitor flows	Specific routes selected by visitors for accessing destinations, and for travelling between destinations
Expenditure patterns	Products and services accessed by self-drive visitors
Attractions	Ownership, types, opening hours, natural/built, heritage/cultural
Accommodation	Caravan parks, motels, hotels, spas, camping, bed and breakfast
Promotion	Forms such as themed routes, public versus private sector sponsorship, mass media
History	When drive tourists first attracted, history of the sites visited by tourists
Investment	Private sector, public sector
Physical infrastructure	Roads, communications, shopping, vehicle repair, accommodation
Cooperation between stakeholders	Between stakeholders in a specific region, between regions, between public and private sectors, including product and destination linkages
Level of public sector involvement	Which level of the public sector (local, state, national), type of involvement, including regulations, investment and subsidies
Economic impacts and innovation	Job generation, new businesses, clustering and networks

the market and the potential for the emergence of new markets. Of particular interest for stakeholders involved in designing, promoting and administering elements of the drive tourism experience are studies comparing initiatives such as themed routes and economic impacts. An appropriately modified version of Table 2 would be an ideal tool for studies of this nature, so that specific components of self-drive tourism case studies could be catalogued against elements of the framework and compared accordingly.

Given the continuing significance of self-drive modes of transport for tourism internationally, and the apparent fragility of air transport following the war on terror and related events, it is likely that tourism marketers will look to implement strategies to compete for greater shares of self-drive visitors. This will have implications for the placement of product information (including potential changes in the use of visitor services); the development of signage and themed touring routes; the expectations of visitor behaviour (perhaps involving longer length of stay but with different expenditure patterns); and the development of infrastructure. Research such as reported in Carson *et al.*³⁶ and in this *Journal of Vacation Marketing* special issue offers some insights into how marketers and destination managers may approach this work. Increased understanding of the dynamics of self-drive tourism will emerge from application of the analytical framework proposed in this paper. Case studies are important for developing this framework, but there is the need to conduct more concerted data analysis involving multiple destinations and empirical data sources.

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