

Prepared for:
Tourism Queensland

Drive Tourism Program – Stage 2

*The Pacific Coast Touring
Route*

SITUATION ANALYSIS

**SUSTAINABLE
TOURISM**



Services

Prepared by:
National Centre for Studies in Travel and Tourism Pty
Ltd
A.C.N. 58 011 075 997

2 September 2005

1. EXECUTIVE SUMMARY

1.1 Role of This Report

This report presents the Situation Analysis Report for the Pacific Coast Touring Route. The report discusses management and marketing issues and identifies key opportunities for the corridor. The issues and opportunities identified draw on the outcomes of consultation with Tourism Queensland, Regional Tourism Organisations, Department of Main Roads and other stakeholders.

1.2 Planning Process

The project was undertaken in several stages. The initial stage involved collection and collation of available research and publications and the preparation of a list of key stakeholders, etc.

Direct contact was made with each of the Main Road Districts and Regional Tourism Organisations.

Individual surveys for the route were prepared and were emailed and mailed out to a wide range of stakeholders including Local Government Authorities, development committees etc. A full list of stakeholders is enclosed as Attachment 1. Copies of the newsletter and survey are included as Attachments 2 and 3 respectively.

The next stage involved collation of this information into a context analysis. The final stage of the project was collation of material and feedback into the draft situation analysis report.

A workshop was held in February 2005 with Tourism Queensland and the Regional Tourism Organisations to present the initial findings and to agree on a preferred way forward.

1.3 Drive Markets

The Pacific Coast Touring Route carries 80% of all drive market trips in Queensland. The touring market represents 35% of this market whilst the rest is made up of the short break market.

Tourism Queensland has commissioned a number of studies looking at the long haul drive market in Queensland including the Queensland Road Travellers Study (2002) and the Central Queensland Road Travellers Survey. Findings from these studies relating to respondents who were on 'touring holidays' and who travelled along all or some of the route include:

- The age profile of travellers using the Pacific Coast Touring Route is slightly younger than travellers using other Queensland routes with 53% aged less than 55 years.
- The majority travelling on the route were on holidays or visiting friends and relatives.
- More than two-thirds were travelling in their own car or 4WD.
- The proportion towing a caravan on the Pacific Coast Touring Route was low relative to the other routes.
- The majority of those surveyed in caravan parks described their overall trip as "touring around" (64%) rather than "driving straight to a main destination and back".
- Just over half of those using the Pacific Coast Touring Route and the Country Way stayed overnight at 11 or more locations during their overall trip (51% each).

- The main sources of information for travellers using the Pacific Coast Touring Route were: maps, motoring organisation brochures, previous knowledge or experience of travel in Queensland, recommendation from family or friends who have travelled in Queensland before, and caravan park association/club brochures.
- According to the Queensland study, around 60% of those using the Pacific Coast Touring Route planned some of their trip (i.e. route taken and towns visited) before leaving home.
- Any pre-trip planning that was undertaken was quite flexible while en-route, with 39% of Pacific Coast Touring Route travellers making unplanned overnight stops during their trip.
- Just over half of Pacific Coast Touring Route travellers were spending 1 month or more away from home on their trip (58%).
- Compared to the other Queensland routes, the Pacific Coast Touring Route had a lower proportion travelling as part of an adult couple (62%) and a higher proportion travelling as a family group (24%).
- In terms of work status and household type, Pacific Coast Touring Route travellers tend towards a slightly younger profile, with:
 - 53% describing their household as either a family with children still at home.
 - 51% working either full- or part-time (vs 34% retired).
- The majority of travellers using the Pacific Coast Touring Route were from within Australia (79%), with 31% from Queensland, 19% from New South Wales and 15% from Victoria. The Pacific Coast Touring Route had the second highest proportion of visitors originating from within Queensland (31%).

1.3.1 Route Awareness

The awareness of Queensland's themed routes was recently investigated in the Regional Route Travellers Study (2004). Although the 'Pacific Coast Touring Route' was not tested, the more commonly used name for the route i.e. 'Bruce Highway', scored highest in prompted awareness amongst road travellers in Queensland (87%).

1.4 What Makes the Pacific Coast Touring Route Stand out from the Other Tour Routes?

Key points of difference for the Pacific Coast Touring Route include:

- It's existing status as National Highway 1.
- The high level of awareness of the Bruce Highway.
- The size and maturity of the service links and towns along the corridor.
- The wide diversity of travel product available along the corridor.
- The wide number of RTO Regions it crosses and the variety of travel themes.
- The existence of significant transport infrastructure (rail, sea and airport hubs)

1.5 Current Visitor Markets

The survey of key stakeholders confirmed that the corridor currently services a wide range of visitor markets. This should not be surprising given that the corridor currently carries over 80% of the drive market in Queensland.

Current visitor markets were identified as:

1. Family Groups (VFR)
2. Older travellers (caravan / mobile homes)
3. Commercial travellers
4. Tour groups
5. Backpackers / independent travellers

1.6 Current Marketing

Three brochures have been produced under the Pacific Coast Touring Route brand, one covering the Sydney to Melbourne section, one for the Sydney to Brisbane section and one for the Melbourne to Sydney section.

Action Graphics produces the Travel Action Bruce Highway and Byways brochure, promoting many of the towns along the Queensland section of the corridor.

There is also a website promoting the Sydney to Brisbane section which accompanies the Pacific Coast Touring Route brochures (www.pacificcoast.com.au).

No route committee exists but there is a marketing group based in New South Wales ('Pacific Coast Tourism Route'). The activities of this group are focussed on promoting the New South Wales section of the route. At present, it is understood that there has been no route planning undertaken by this group.

All RTOs contacted were unaware of any cooperative marketing framework or collateral for the corridor. None of the Regional Tourism Organisations have a dedicated plan for the Pacific Coast Touring Route, however components of the route (Sydney, Central Queensland, etc) are marketed to the touring market. At this stage, no marketing or business plan exists for the corridor. The route is also promoted in the Queensland Motoring Guide.

1.7 Drive Market Opportunities

Key opportunities for the Pacific Coast Touring Route include:

- The route carries 80% of all drive market visitors, but as repeat visitation grows, there needs to be some communication to both new and old markets informing them of the new experiences on offer along the route.
- Potential new market segments include the fly/drive, accommodated touring (multi-market segment) and International markets.
- Working with RTOs along the route to develop itineraries and regional touring circuits.
- Improve fly/drive options, train/drive options etc.
- Links with SEQ Country Touring Guide, Brisbane to Southern Great Barrier Reef Motoring Guide, International self-drive packages.
- Links to 4WD routes and tourist drives along the eastern coast e.g. links to Fraser Island etc.
- Links to Great Green Way and Regional Tourism Drives (TTNQ).
- Upgrade of website.
- Identify new points of interest and conduct photo shoots to communicate the story to the market through PR.

1.8 Next Steps

Following a meeting with key stakeholders on 16th February 2005, the following opportunities and action plan was agreed:

1. *Multiple Buy-in Layers*

The Pacific Coast Touring Route should be presented as a strategic part of the Queensland Drive Tourism Program. Action needs to be undertaken to present the corridor as representing three levels or layers of buy in. At one level the Pacific Coast represents a state wide touring experience. At a second level the individual sections or service centres along the corridor need to be promoted as

'biteable chunks'. At a third level, the regional links, loops and drive itineraries need to be developed.

2. Value-add to Existing Service Hubs Along the East Coast

Build and value-add to the existing service hubs along the corridor. This involves developing specialised experiences, itineraries, touring loops and fostering the role played by the network of visitor information centres along the route (interpretation, information, etc.).

3. Raise Awareness of Hidden Secrets

Focus on raising awareness of the hidden secrets and new products along the Route (for example, fishing, access to national parks). This will assist in the development of themes and unique experiences for each of the hubs along the Pacific Coast Touring Route. It will also help to infill product gaps.

4. Value Add to Existing Marketing / Promotional Tools

Utilise existing marketing tools to continue to promote the Pacific Coast Touring Route and its various segments e.g. Brisbane to Bundaberg, Brisbane to Sydney Motoring Guide, Barrier Reef, Great Green Way etc.

5. Develop a Focussed Public Relations / Media Campaign

Boost the number of media stories and photo shoots of the Pacific Coast Touring Route, particularly focussing on the different experiences offered along the Route.

6. Establish and Develop Trade Partnerships

Identify and establish partnerships with key companies which have the ability to attract and service different markets and needs along the Route. Key partnerships include Queensland Rail, car hire companies, tour companies, petrol stations, airports, aviation companies etc.

7. Develop an Electronic Presence

In order to appeal to the International market, a comprehensive website should be developed. The website would include a route planner, suggested itineraries, maps, information of the different segments of the touring route etc. This web site should be innovative and hands on.

1.9 Implementation Priorities

1. Develop regional touring circuits along the corridor.
2. Upgrade web site presence.
3. Develop an interpretation template and install interpretation panels along the corridor.
4. Advertise the corridor in key drive market publications.
5. Align with State Road Strategy initiatives including alpha numeric signage, research, marketing etc.

CONTENTS

1.	EXECUTIVE SUMMARY	1
1.1	ROLE OF THIS REPORT	1
1.2	PLANNING PROCESS	1
1.3	DRIVE MARKETS	1
1.3.1	Route Awareness	2
1.4	WHAT MAKES THE PACIFIC COAST TOURING ROUTE STAND OUT FROM THE OTHER TOUR ROUTES?	2
1.5	CURRENT VISITOR MARKETS	2
1.6	CURRENT MARKETING	3
1.7	DRIVE MARKET OPPORTUNITIES	3
1.8	NEXT STEPS	3
1.9	IMPLEMENTATION PRIORITIES	4
2.	BACKGROUND	7
2.1	TERMS OF REFERENCE	7
2.2	ROLE OF THIS REPORT	7
2.3	PLANNING PROCESS	7
3.	THE QUEENSLAND TOURISM ROAD NETWORK – IMPLICATIONS FOR THE PACIFIC COAST TOURING ROUTE	9
3.1	THE TOURISM ROAD NETWORK	10
3.2	DRIVE TOURISM ROUTES	12
3.3	DRIVE TOURISM STAGE 2 ROUTES	13
3.4	ROAD NETWORK	14
3.5	DISTANCE	14
4.	CORRIDOR MANAGEMENT	19
4.1	CORRIDOR STATUS	19
4.2	KEY STAKEHOLDERS	19
4.3	REGIONAL TOURISM ORGANISATIONS	20
4.4	MAIN ROADS ORGANISATIONAL STRUCTURE	21
4.5	MANAGEMENT OF ROAD CORRIDORS	22
4.5.1	Roadside Advertising Policy	22
4.5.2	Provision of Roadside Amenities	22
4.5.3	Road Direction Signage Policy	23
4.5.4	Visitor Information Network	23
4.5.5	District Tourism Signage Committees	24
5.0	DRIVE MARKET RESEARCH – WHAT DOES IT TELL US ABOUT THE PACIFIC COAST TOURING ROUTE?	25
5.1	RESEARCH OVERVIEW	25
5.1.1	Commentary	26
5.2	ROUTE AWARENESS	26
5.3	QUEENSLAND DRIVE MARKET RESEARCH – AN OVERVIEW	28
5.3.1	Drive Tourism and Touring Market Review	28
5.3.2	Drive Market Summary	29
5.3.3	Queensland Road Travellers Survey	31
5.3.4	Road Travellers Study	32
5.4	DEPARTMENT OF MAIN ROADS RESEARCH	32
5.5	THE ROAD TRAVEL EXPERIENCE	33
5.6	DESTINATION MANAGEMENT PLANS	33
5.7	COMPARATIVE REVIEW	36
6.	CORRIDOR PRODUCT AUDIT	39
6.1	MAJOR PRODUCTS/ATTRACTIONS	39
6.2	THEMATIC LINKAGES	46

7.	HARD INFRASTRUCTURE AUDIT	48
	7.1 MAIN ROADS SERVICE INFRASTRUCTURE (E.G. REST AREAS)	48
	7.2 SWOT ANALYSIS	49
	7.2.1 Commentary	50
	7.3 PARTNERSHIPS	50
8.	NEXT STEPS	51
	8.1 IMPLEMENTATION PRIORITIES	52
	ATTACHMENTS	53
	ATTACHMENT 1: STAKEHOLDER LIST	54
	ATTACHMENT 2: NEWSLETTER	57
	ATTACHMENT 3: SURVEY	59
	ATTACHMENT 4: RESEARCH	67

2. BACKGROUND

2.1 Terms of Reference

Following the successful completion of Stage One of the Drive Tourism Program, Tourism Queensland have identified five new routes for development for the touring drive market. The five routes include the Great Inland Way, Leichhardt Highway, Country Way, Pacific Coast Touring Route and the Capricorn Highway. The purpose of the Drive Tourism Program is to move the five identified routes into their next stage of development, increasing the tourism benefits to those towns along each drive.

Deliverables and Outcomes

The following project deliverables have been identified in the Consultancy Brief:

- Identify what is happening on the ground and where the Drive Tourism Program – Stage Two can value-add.
- Ascertain the long-term vision and positioning for each corridor.
- Establish what steps are required to achieve the vision.
- Establish what the role of the Drive Tourism Program is in achieving the vision.

2.2 Role of This Report

This report presents the Situation Analysis Report for the Pacific Coast Touring Route. The report discusses management and marketing issues and identifies key opportunities for the corridor. The issues and opportunities identified draw on the outcomes of consultation with Tourism Queensland, Regional Tourism Organisations, Department of Main Roads and other stakeholders.

2.3 Planning Process

The project was undertaken in several stages. The initial stage involved collection and collation of available research and publications and the preparation of a list of key stakeholders, etc.

Direct contact was made with each of the Main Road Districts and Regional Tourism Organisations.

Individual surveys for the route were prepared and were emailed and mailed out to a wide range of stakeholders including Local Government Authorities, development committees etc. A full list of stakeholders is enclosed as Attachment 1. Copies of the newsletter and survey are included as Attachments 2 and 3 respectively.

The next stage involved collation of this information into a context analysis. The final stage of the project was collation of material and feedback into the draft situation analysis report.

A workshop was held in February 2005 with Tourism Queensland and the Regional Tourism Organisations to present the initial findings and to agree on a preferred way forward.

STEPS	STATUS
1. Project Mobilisation Data Collection/Collation and Literature Review Review Reports Determine Key Stakeholders	✓ ✓ ✓
2. Surveys Questionnaire developed Questionnaire distributed to key stakeholders	✓ ✓
3. Context Report Context Report prepared Presented to Tourism Queensland	✓ ✓
4. Workshop Workshop conducted with RTO/TQ Managers (planned for 16 th February)	✕
5. Draft Situation Analysis Report Prepared	✓
6. Sign-off by Tourism Queensland	

3. THE QUEENSLAND TOURISM ROAD NETWORK – IMPLICATIONS FOR THE PACIFIC COAST TOURING ROUTE

Any review of the Queensland Tourism Road Network must start with a recognition that our marketplace (the consumer) travels from across Australia and overseas to visit Queensland. Key issues for the Pacific Coast Touring Route (PCTR) include:

- (1) The role played by interstate road links that start in New South Wales and the regional road networks in New South Wales and Queensland which feed off the corridor e.g. how does the Pacific Coast better link and trade off these road networks?
- (2) The multiple destination and key decision points (cross roads) which connect with the Pacific Coast Touring Route. Many road travellers might initially travel along sections of the Pacific Coast Touring Route but have the option of returning to their place of origin via a different road corridor (what are the key decision points for the Pacific Coast Touring Route?)
- (3) Given the extensive range of tourism destinations. Most travellers will use sections of the corridor and match and link their travel using other connecting routes.
- (4) The competitive nature of the tourism market within regional Australia including the wide range of local authorities, regional and local tourism associations who compete for visitors (how do we promote the take-up and support of the Pacific Coast Touring Route through key tourism organisations etc.).

In addition to these issues, there are a wide number of consumer and marketplace issues which have the potential to impact on the Corridor. Some of these include:

- The arrival of discount airfares for key service hubs along the corridor.
- Increasing leisure traffic made up of caravans and motorhomes.
- Rising fuel prices.
- More quality web based information.

Included in Table 1 is an outline of the Tourism Road Network in Queensland. A map of Australia identifying the road network is included on page 13.

A map of the various state and national badges is outlined on page 16. The Pacific Coast Touring Route has been rebadged as the A1. This will bring about some level of brand identity and continuity for the route in Queensland.

3.1 The Tourism Road Network

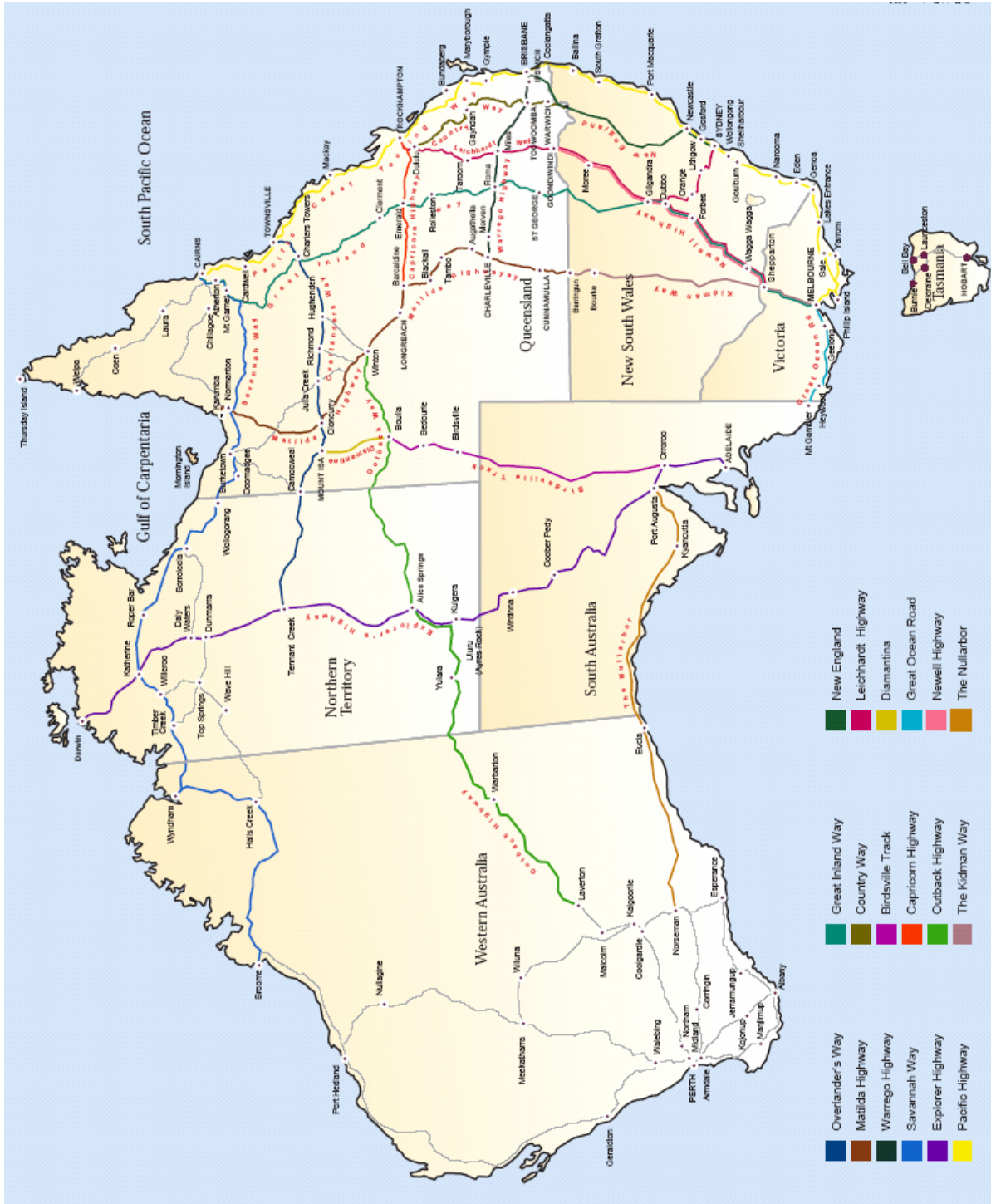
Table 1: The Queensland Tourism Road Network

Themed Route	Description	Destination Points	Key Decision Points	Interstate Focal Points	Themed H/W Linkages
Pacific Coast Touring Route (A1)	Coolangatta to Cairns (Pacific and Bruce Highways)	Cairns (North), Brisbane (South)	Townsville Mackay Rockhampton	Sydney	- Overlanders Way - Savannah Way
Warrego Highway (A2)	Brisbane to Charleville (Warrego Highway)	Brisbane (East) Charleville (West)	Brisbane Toowoomba turnoff (near Ipswich) Toowoomba Miles Roma Morvan Charleville	Tennant Creek Darwin	- Matilda Highway - Country Way - Leichhardt Highway - Great Inland Way
Country Way Highway 17 (A3)	Rockhampton to Wallangarra (New England, Burnett Highways)	Rockhampton (North) Stanthorpe (South)	Westwood Dululu Biloela Toowoomba Warwick	Tamworth Sydney	- Pacific Coast Touring Route - Warrego Highway
Leichhardt Highway (A5)	Rockhampton to Goondiwindi (Leichhardt Highway)	Rockhampton (North) Goondiwindi (South)	Rockhampton Westwood Dululu Miles Goondiwindi Moonie	Dubbo Melbourne	- Warrego Highway - Capricorn Highway
Overlanders Highway (A6)	Townsville to Tennant Creek (Flinders and Barkly Highways)	Townsville (East) Tennant Creek (West)	Charters Towers Cloncurry Hughenden Mt. Isa	Tennant Creek Darwin	- Matilda Highway - Great Inland Way - NT Explorers Highway
The Great Inland Way (A7)	Cairns to Hebel (Kennedy H/Way, Gregory Developmental Road, Gregory Highway, Dawson Highway, Carnarvon Developmental Road, Carnarvon Highway, Castlereagh Highway)	Cairns (North) Dubbo (NSW)	Charters Towers Emerald Roma St George Rolleston Clermont	Dubbo Melbourne Sydney	- Warrego Highway - Overlanders Way - Savannah Way - Capricorn Highway
Matilda Highway (A2/A6)	Cunnamulla to Karumba Mitchell/Landsborough, Bourke Developmental Road	Karumba (n) Cunnamulla(s)	Cunnamulla Charleville Barcaldine Winton Cloncurry Normanton	Nyngan Dubbo	- Kidman Highway - Barrier Highway - Overlander's Way
Capricorn Highway (A4)	Rockhampton to Barcaldine	Rockhampton (east)	Barcaldine Emerald	Not applicable	- Great Inland Way

Themed Route	Description	Destination Points	Key Decision Points	Interstate Focal Points	Themed H/W Linkages
	Longreach	Barcaldine (west)	Dingo Rockhampton Longreach		- Matilda Highway - Leichhardt Highway

3.2 Drive Tourism Routes

Figure 1: Map of Drive Tourism Routes



3.3 Drive Tourism Stage 2 Routes

Figure 2: Drive Tourism Stage 2 Routes



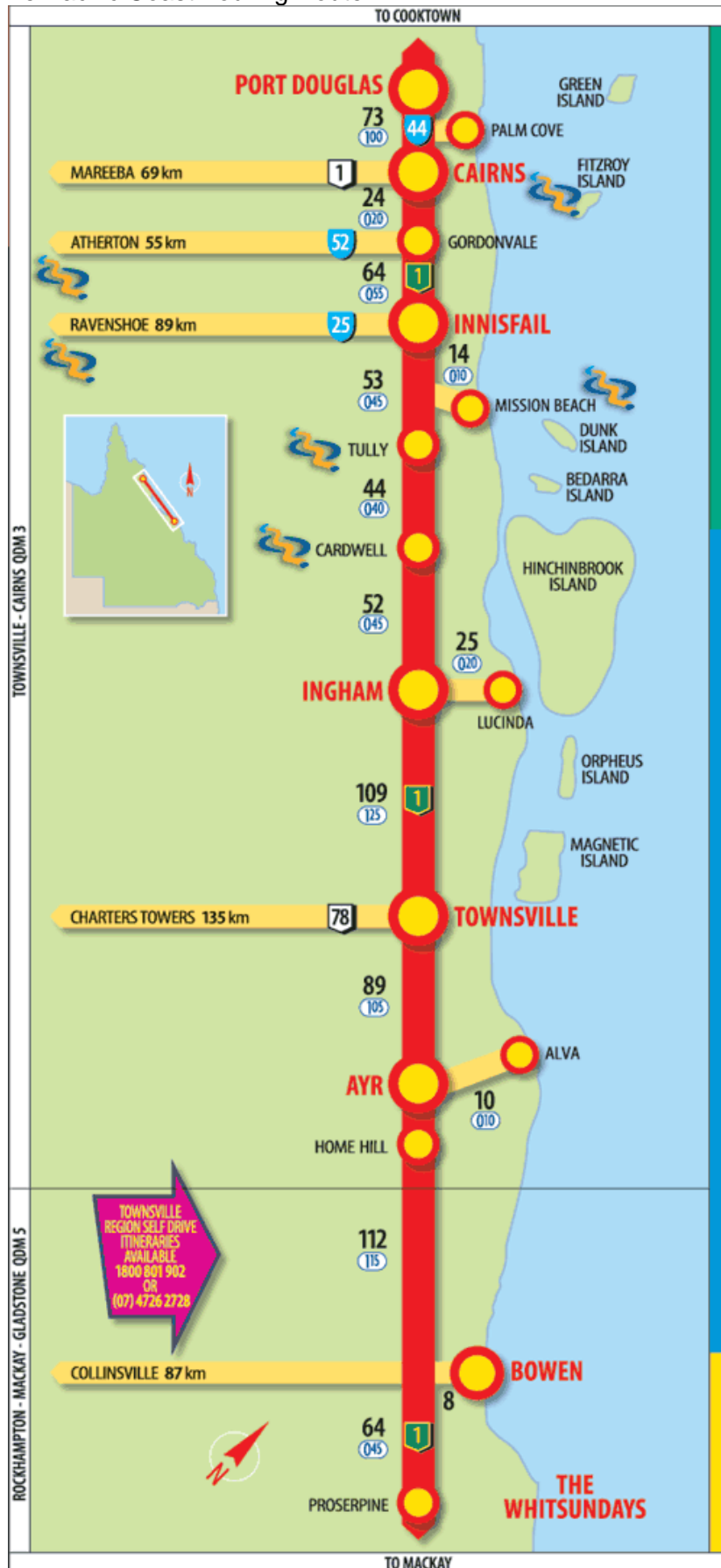
3.4 Road Network

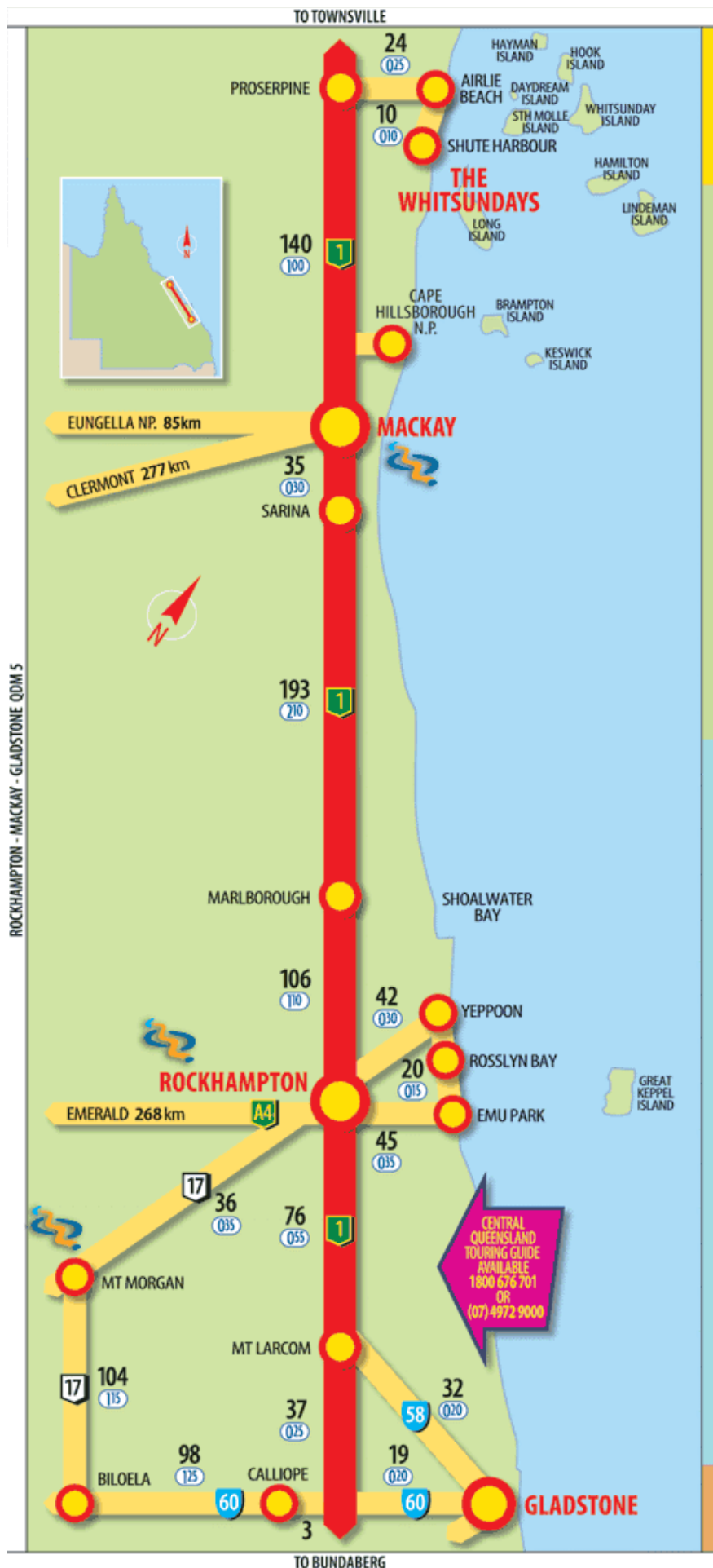
The Pacific Coast Touring Route is a north south coastal route, stretching from Melbourne in Victoria to Cairns in North Queensland. The Pacific Coast Touring Route crosses the border at Coolangatta and passes through 32 local government areas and Brisbane and a large number of coastal towns.

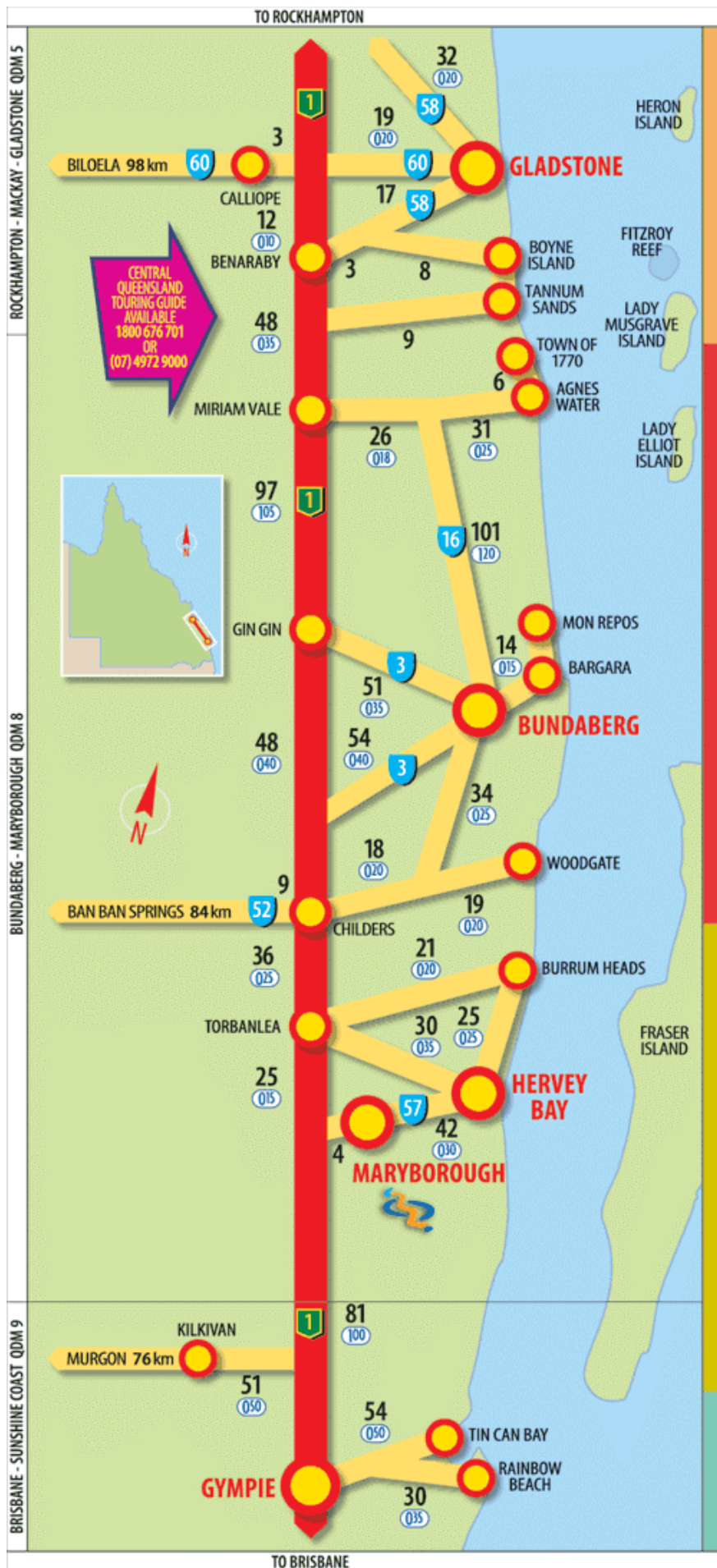
3.5 Distance

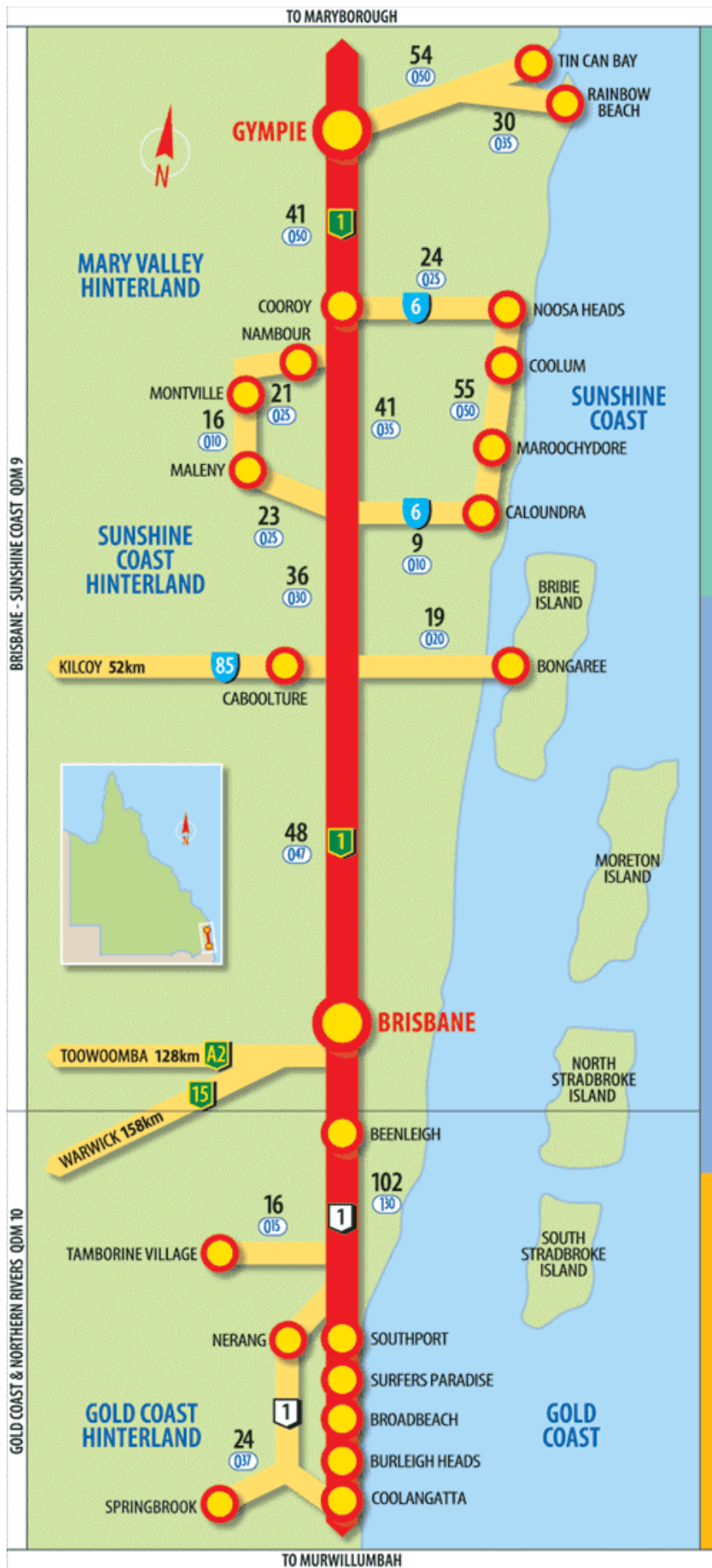
The Pacific Coast Touring Route / Bruce Highway extends over 1,800km along the east coast in Queensland from Coolangatta to Cairns (via Brisbane, Gympie, Rockhampton, Mackay and Townsville).

Figure 3: The Pacific Coast Touring Route









Source: Tourism Queensland

4. CORRIDOR MANAGEMENT

4.1 Corridor Status

Three brochures have been produced promoting the Pacific Coast Touring Route, one for the Sydney to Melbourne section, one for the Sydney to Brisbane section and one for the whole route (i.e. Sydney to Cairns).

Action Graphics produces the Travel Action Bruce Highway and Byways brochure, promoting many of the towns along the route.

There is also a website promoting the Sydney to Brisbane section which accompanies the Pacific Coast Touring Route brochures (www.pacificcoast.com.au).

No route committee exists but there is a marketing group based in New South Wales ('Pacific Coast Tourism Route'). However, the activities of this group are focussed on promoting the New South Wales section of the route. At present, it is understood that there has been no route planning undertaken by this group.

All RTOs contacted were unaware of any cooperative marketing framework or collateral for the entire corridor but some work together on segments of the route. None of the Regional Tourism Organisations have a dedicated plan for the Pacific Coast Touring Route and most do not include the corridor in their current destination marketing plans.

4.2 Key Stakeholders

A review of the Queensland Roads Network has highlighted the multiple stakeholders which exist at a regional level.

Table 2: Summary of Highway Stakeholder Groups

T=Route	Local Government Authorities	RTOs	Main Roads Districts	Accredited VICs
Pacific Coast Touring Route	32	11	8	21
Country Way	17	6	4	5
Leichhardt Highway	7	2	3	3
Capricorn Highway	7	2	3	3
Great Inland Way	16	5	5	6

Key implications for the Pacific Coast include:

1. Large number of LGA stakeholders (32 in total).
2. Eleven RTOs (which all have competing marketing plans).
3. Challenges associated with establishing a management/marketing group and maintaining continuity of this group.

Outlined below is an overview of key partnerships which need to be further developed in Stage 2 of the Drive Tourism Program.

- RTOs and Tourism Queensland
- Motoring Organisations

- Map producers
- All businesses along the route to use brand
- Other routes to promote Queensland
- EDOs, tourism officers and VICs along the route
- Major sponsor or partner
- DMR, LGs and Queensland Transport
- Freight companies – protocol for safe travel
- 4WD Clubs
- CMCA and Caravan Clubs etc.

4.3 Regional Tourism Organisations

There are fourteen official RTOs in Queensland. RTO regions are shown in Figure 4. The traditional role of RTOs has been one of marketing, but as the industry has developed in recent years, the role of some of the larger RTOs has increased to include research, product upgrading and development, encouraging investment, assisting in the management of industry development and training. It is important to recognise that the role and resources of RTOs differ significantly throughout Queensland. This varying role of RTOs has implications for the effort and resources they are able to allocate to road planning issues.

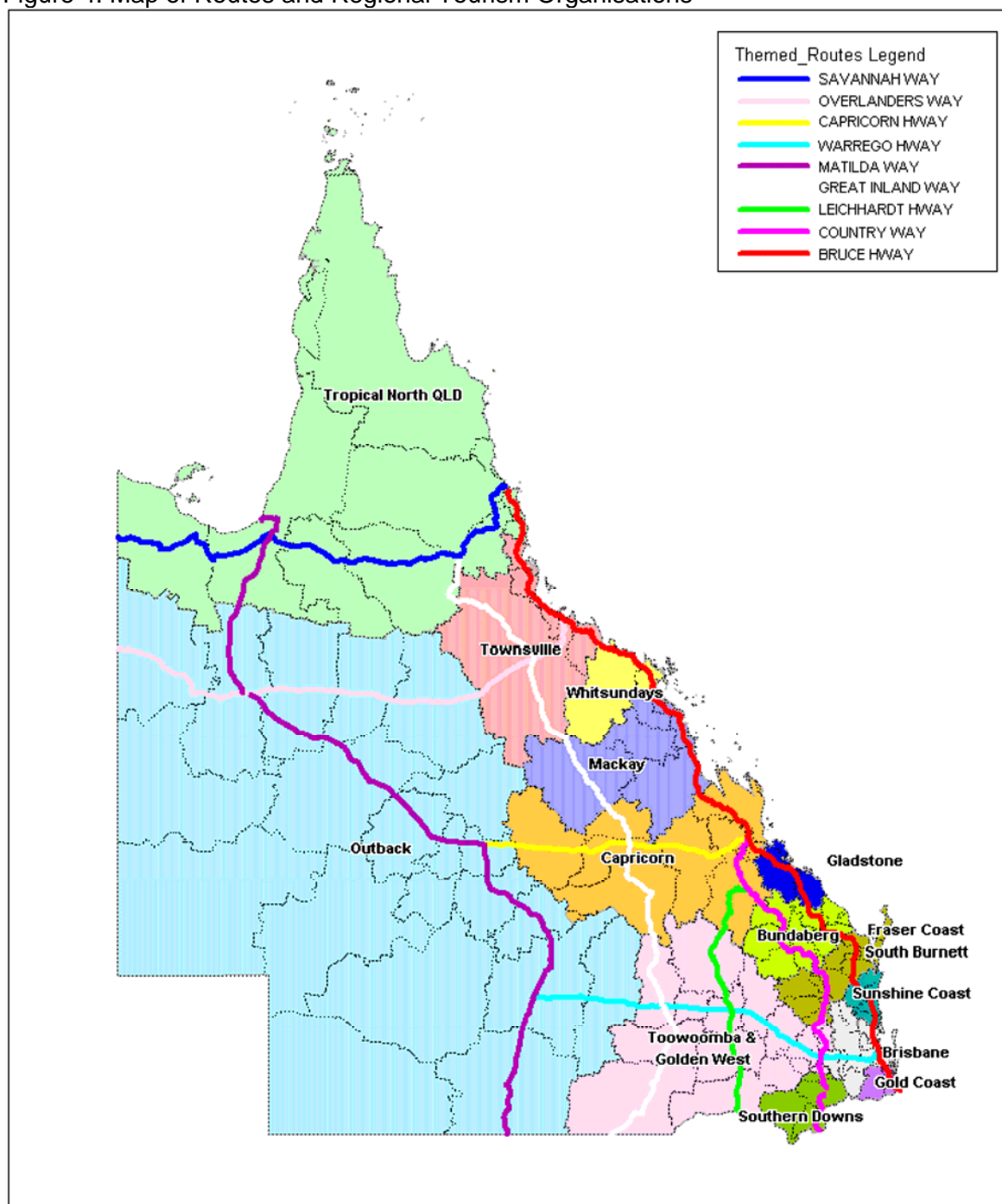
Some of the RTOs address regional development issues while others only have a mandate for tourism marketing and promotion.

While regional tourism strategies have been prepared for 80% of the RTOs over the last ten years, only a limited number of these strategies have addressed road transport/infrastructure issues.

A map of RTOs crossed by the Pacific Coast Touring Route is shown in Figure 4.

The Pacific Coast Touring Route crosses eleven of the official 14 RTOs.

Figure 4: Map of Routes and Regional Tourism Organisations



Source: Tourism Queensland, 2004.

4.4 Main Roads Organisational Structure

Detailed planning and delivery of road management activities are carried out by four Regions and fourteen Districts. Regions are headed by Regional Executive Directors, and Districts by District Directors. The Strategic Planning function is managed by the Regional Advisor (Road Network Performance) within each Region. At the more local District level, planning and delivery of road works are the responsibility of the Manager (Transport Planning) and the Manager (Infrastructure Delivery). The composition of Main Roads Regions and Districts is shown in Table 3.

Table 3: Main Roads Regions and Districts

Region	Regional Office	District	District Office
South-East	Brisbane	Metropolitan	Brisbane
		South Coast	Nerang
		Hinterland	Gympie
		North Coast	
Southern	Toowoomba	Hinterland	
		Southern	Toowoomba
		South Western	Roma
		Border	Warwick
Central	Rockhampton	Wide Bay	Bundaberg
		Central	Rockhampton
		Central Western	Barcaldine
		Mackay	Mackay
Northern	Townsville	Central Highlands	Emerald
		Northern	Townsville
		North Western Peninsula	Cloncurry Cairns

Source: Strategic Tourism Roads Study, 2000.

4.5 Management of Road Corridors

4.5.1 Roadside Advertising Policy

Main Roads administers roadside advertising within the boundaries of State-controlled roads and advertising beyond these boundaries but visible from State-controlled roads designated as motorways. The first edition of this policy was issued in December 2002.

Under this policy, roadside advertising will not be permitted if it compromises road safety, transport efficiency or visual amenity. The policy does not make specific reference to tourism advertising or strategies to enhance tourism development.

4.5.2 Provision of Roadside Amenities

Although strictly speaking, hard infrastructure, roadside amenities complement the role of soft infrastructure in improving visitor knowledge of and confidence in the road system.

The policy concerning roadside amenities forms part of an integrated approach to road safety. It focuses on long distance travellers and is aimed at reducing fatigue-related accidents, and enhancing the total travel experience. Main Roads administers seven types of amenities on State-controlled roads. They include:

- commercial service centres;
- rest areas with amenities to enable drivers of light and heavy vehicles to rest and recuperate;
- stopping places – where stops will be short such as at points of interest (e.g. lookouts) and pull off areas;
- interception sites for weighing and inspecting heavy vehicles;
- bus stops;
- help phones; and
- roadside vending sites.

Main Roads will provide facilities along major routes in the State-controlled road network when they are not made available by other commercial or community-based organisations. The policy is integrated with various initiatives for promoting road-based tourism.

These include provision of adequate information to encourage stopping to avoid fatigue (through signage, maps and advertising), and provision of roadside amenities such as stopping places, which allow travellers to enjoy the special character of regions through which they are travelling. It also aims to maximise the involvement of industry (including the tourist industry) and local community groups in developing roadside amenities.

A map of the road side rest areas in Queensland is included in Attachment 4.

4.5.3 Road Direction Signage Policy

Guide signs are one of the three levels of road signing, the other levels being regulatory signs and warning signs. Guide signs (white on green) provide drivers with guidance as to destinations and routes as a means of navigating through the road network. Guide signs are the most relevant to Strategic Tourism Routes. Guide/direction signs include advance direction signs, intersection direction signs, fingerboards, reassurance direction signs, street name signs and route markers. Road users depend on guide signs for information and guidance. Guide signage is designed for route continuity and for use by long distance travellers, strangers to an area and tourists. Route continuity is also one of the key aims of Tourism Theme Route Signage.

The Focal Point System is a system employed to determine place names for inclusion on guide signs. Correct application of the system will produce consistency in signing and more importantly, will facilitate association, between actual routes and destinations and those found on maps and in street directories.

Focal points are important towns and places which have been selected to provide the basis of direction signing of important roads in the State. They are generally the towns occurring at the junction of major routes. Where such an intersection occurs outside the vicinity of a suitable town, the name of the intersected road may be chosen as the Focal Point. All Focal Points which have been chosen for Queensland are shown on focal point maps available from District Engineers or from the Construction and Traffic Services Branch of the Queensland Department of Transport.

Focal Points are chosen for their 'importance', which is generally determined by: How 'recognisable' a destination is or how prominently it is displayed on most maps. Its location with respect to the route or routes through which motorists are being guided.

4.5.4 Visitor Information Network

The information network used by visitors should ideally begin when planning the trip and cascade through the use of soft and hard infrastructure facilities on the journey to provide consistent and timely information. Hard infrastructure is capital intensive and includes the following visitor facilities.

- 'Hard' Visitor Facilities
- General Directional Signage
- State Gateway Signage/Regional Gateway Signage
- Information Bays/Pull Overs
- Tourist and Service Signing
- Accredited Information centres/local information centres
- Rest Areas/driver reviver sites/truck stops
- Themed Tourism Routes and Tourist Drives
- Point of Interest/Interpretation Sites
- Heritage Site/Trail Signage
- Tourist Area/Precinct Signage

- Town Service Signage

'Soft' Visitor Facilities include those sources of information that the visitor carries or uses to plan the trip. These include:

- Regional Brochures and websites
- Road Maps (Tourism Queensland, RACQ, NRMA, etc.)
- Visitor Radio
- Tourism Information Kits
- Navigation Systems

Accredited Visitor Information Centres:

- Coolangatta
- Surfers Paradise
- Caboolture
- Kybong
- Tiaro
- Maryborough
- Childers
- Miriam Vale
- Rockhampton
- Sarina
- Mackay
- Proserpine
- Bowen
- Ayr
- Townsville
- Ingham
- Tully
- Mission Beach
- Innisfail
- Babinda
- Cairns

4.5.5 District Tourism Signage Committees

The revised policy (August 1999) encouraged District Directors of Main Roads to establish district tourism signage committees (DTSCs) in each of the fourteen (14) Main Roads districts. The DTSCs were intended to have representation from Regional Tourism Organisations, Local Government, RACQ, and the Police where appropriate.

The DTSCs have been operating well in the area of signage application assessment with some expanding the role of the group to include new projects like tourism drives and regional tourism signage strategies. DTSC's are essentially a referral agency, providing advice to the DMR on decisions relating to tourism road signing. The aim of the Committees is to provide for a balanced and equitable approach to tourism related signage that is in the best interests of the region, state and motoring public.

Eight Committees are crossed by the corridor. These include:

- Peninsula
- Northern
- Mackay
- Central
- Wide Bay
- North Coast Hinterland
- Metropolitan
- South Coast Hinterland

5.0 DRIVE MARKET RESEARCH – WHAT DOES IT TELL US ABOUT THE PACIFIC COAST TOURING ROUTE?

5.1 Research Overview

Tourism Queensland has commissioned a number of studies looking at the long haul drive market in Queensland including the Queensland Road Travellers Study (2002) and the Central Queensland Road Travellers Survey. Findings from these studies relating to respondents who travelled along all or some of the route include:

- The majority travelling on the route were on holidays or visiting friends and relatives.
- More than two-thirds were travelling in their own car or 4WD.
- The proportion towing a caravan on the Pacific Coast Touring Route was low relative to the other routes.
- The majority of Pacific Coast Touring Route travellers described their overall trip as “touring around” (64%) rather than “driving straight to a main destination and back”.
- Just over half of those using the Pacific Coast Touring Route and the Country Way stayed overnight at 11 or more locations during their overall trip (51% each).
- The age profile of travellers using the Pacific Coast Touring Route is slightly younger than travellers using other Queensland routes with 53% aged less than 55 years.
- The main sources of information for travellers using the Pacific Coast Touring Route were: maps, motoring organisation brochures, previous knowledge or experience of travel in Queensland, recommendation from family or friends who have travelled in Queensland before, and caravan park association/club brochures.
- Compared to the other strategic routes, the Pacific Coast Touring Route had the lowest proportion of travellers who obtained information from a Queensland Visitor Information Centre whilst on their trip (53%).
- According to the Queensland study, around 60% of those using the Pacific Coast Touring Route planned some of their trip (i.e. route taken and towns visited) before leaving home.
- Any pre-trip planning that was undertaken was quite flexible while en-route, with 39% of Pacific Coast Touring Route travellers making unplanned overnight stops during their trip.
- Just over half of Pacific Coast Touring Route travellers were spending 1 month or more away from home on their trip (58%).
- Just over half of travellers using the Pacific Coast Touring Route had toured around Queensland by motor vehicle previously in the last three years (58%).
- Compared to the other Queensland routes, the Pacific Coast Touring Route had a lower proportion travelling as part of an adult couple (62%) and a higher proportion travelling as a family group (24%).
- In terms of work status and household type, Pacific Coast Touring Route travellers tend towards a slightly younger profile, with:
 - 53% describing their household as either a family with children still at home.
 - 51% working either full- or part-time (vs 34% retired).
- The majority of travellers using the Pacific Coast Touring Route were from within Australia (79%), with 31% from Queensland, 19% from New South Wales and 15% from Victoria. The Pacific Coast Touring Route had the second highest proportion of visitors originating from within Queensland (31%).
- The main reason respondents cited for travelling on the Pacific Coast Touring Route was “I need to travel on it to get where I am going” (70%).

- The top three reasons cited as barriers to travel to Queensland in the future by adult couples using the Pacific Coast Touring Route included: “unacceptable condition of roads/highways” (31%), “fuel prices” (10%) and “trucks/heavy vehicles/traffic/road works” (5%).
- 82% of travellers using the Pacific Coast Touring Route who said they would ‘definitely’, ‘probably’ or ‘possibly’ return to Queensland on a motoring holiday in the next three years.

5.1.1 Commentary

The survey of key stakeholders confirmed that the market information outlined in 5.1 was generally consistent with data collected along the other road corridors.

Current visitor markets were identified as:

1. Family Groups (VFR)
2. Older travellers (caravan / mobile homes)
3. Commercial travellers
4. Tour groups
5. Backpackers / independent travellers

5.2 Route Awareness

The awareness of Queensland’s themed route was recently investigated in the Regional Route Travellers Study (2004). Although the ‘Pacific Coast Touring Route’ was not tested, the more commonly used name for the route i.e. ‘Bruce Highway’, scored highest in terms of awareness amongst road travellers in Queensland (87%).

Table 4 Drive Market Research Summary

	Capricorn Highway		Leichhardt Highway		Pacific Coast Touring Route					Country Way		Great Inland Way		
Visitor Numbers	Rock-Emerald	Emerald-Barc	Goond-Miles	Miles-Rock	NSW Border-Bris	Bris-Mary	Mary-Rock	Rock-Town	Town-Cair	Wall-Toow	Toow-Rock	Hebel-Roma	Roma-Em	Em-CT
Tourist Traffic (%) Visitor No.	14.3% 137,000	34.1% 62,000	72.5% 163,000	27.4% 50,000	17% 3.2million	20.4% 836,400	52.5% 900,000	47.3% 578,000	16.2% 244,000	7.5% 110,000	12% 31,000	87.2% 74,000	20.4% 32,000	12.4% 17,000
2. Route Awareness	73%		60%		87%					13%		38%		
3. Trip Type	Touring around (75%)		Touring around (71%)		Touring around (64%)					Touring around (66%)		Touring around (85%)		
4. Route Motive	Need to get to end destination (86%)		Need to get to end destination (68%)		Need to get to end destination (70%)					Need to get to end destination (60%)		Need to get to end destination (76%)		
5. Domestic Visitors	88% Qld – 33% NSW – 22% VIC – 13%		97% Qld – 24% NSW – 20% VIC – 32%		79% Qld – 31% NSW – 19% VIC – 15%					90% Qld – 30% NSW – 30%		80% Qld – 21% NSW – 26% VIC – 12%		
6. Age	>55 (61%) 55-64 (38%)		>55 (67%)		<55 (53%)					>55 (55%)		>55 (63%)		
7. Purpose	85% visiting friends + relatives or holiday		88% visiting friends + relatives or holiday		88% visiting friends + relatives or holiday					85% visiting friends + relatives or holiday		80% visiting friends + relatives or holiday		
8. Travel Party	Adult couple – 73% Family group – 18%		Adult couple – 73% Family group – 17%		Adult couple – 62% Family group – 24%					Adult couple – 65% Family group – 24%		Adult couple – 80%		
9. Work Status	Retired – 30% Later Family – 35% Families/Children – 31%		Retired – 57% Later families – 57%		Retired – 34% Later Families – 46% Family/Children – 53% Full or Part-time – 51%					Retired – 49% Later Families – 49%		Retired – 34% Later Families – 40% Families – 28% Full or Part-time – 46%		
10. Own Car/4WD Caravan	70% 18%		77% 33%		70% 19%					70% 28%		65% 22%		
11. Pre-Trip Planning	Planned – 62% No Firm Plans – 23%		Planned – 60%		Planned – 60% No Firm Plans – 23%					Planned – 60%		Planned – 67% No Firm Plans -22%		
12. En-Route Planning	Flexible en-route – 42%		Flexible en-route – 41%		Flexible en-route – 39%					Flexible en-route – 38%		Flexible en-route – 51%		
13. VIC Information	62%		61%		53%					NA		82%		
14. Sources of Information	Maps Previous Knowledge/experience Brochures		Previous knowledge Maps and brochures from motoring organisations/caravan and camping shows		Maps Motoring Organisation Brochures Previous knowledge/experience Recommendations from family and friends Caravan park association brochures					Previous knowledge/experience Maps Brochures Recommendations from family and friends		Maps Motoring organisation brochures Previous knowledge or experience Recommendation from family and friends Caravan/camping show brochures		
	Adult Couples	Families	Adult Couples	Families	Adult Couples		Families			Adult Couples	Families	Adult Couples		Families
15. Barriers	Conditions (39%) Fuel Prices (11%) Weather (7%)	Conditions (19%) Trucks (16%) Camping Facilities (8%)	Conditions (37%) Fuel Prices (17%) Weather (9%)	Fuel Prices (22%) Condition (19%) Distance (16%)	Conditions (31%) Fuel prices (10%) Trucks (5%)		Conditions (21%) Distance (15%) Fuel Prices (12%)			Conditions (32%) Fuel Prices (12%) Weather (7%)	Family reasons (19%) Conditions (12%) Distance (10%)	Conditions (37%) Fuel Prices (8%) Weather (5%)	Fuel Prices (11%) Trucks (11%) Conditions (10%)	
16. Time Away From Home	One month or more (71%)		One month or more (78%)		One month or more (58%)					One month or more (55%)		One month or more (79%)		

5.3 Queensland Drive Market Research – An Overview

Tourism Queensland has commissioned a number of studies in the past five years relating to Drive Tourism in Queensland. The studies most relevant to this study include:

- EDMA research – Drive Tourism and Touring Market Review (October 2003)
- Tourism Queensland Research Department – Drive Market Summary (July 2003)
- Millward Brown – Central Queensland Road Final Report (January 2002).
- Yann Campbell Hoare Wheeler – Road Travellers Study (December 1999)

5.3.1 Drive Tourism and Touring Market Review

Through a context analysis and stakeholder workshops, this study explored potential markets and changing needs in existing markets and identified key challenges or activities needed to attract drive visitors to Queensland.

The study identified that Queensland compared with other States is:

- A friendly and welcoming place;
- The Outback with a particular pioneer feel to it; and
- An outdoor holiday where the sun shines, there is better weather, a more active place with more places to visit.

In contrast, the other States and overseas have different market positioning as set out in Table 4.

Table 5 Marketing Positioning

State/Destination	Market Positioning
New South Wales	An older, more affluent profile with an indistinct positioning
Victoria	Quiet sophisticated, compact, cooler, more European history
South Australia	Wineries feature
Western Australia	More aspirational than Queensland, place of adventure (Kimberleys), pioneering, nature
Northern Territory	Adventure, once in a lifetime, 4WD, real characters and isolation
Tasmania	Affluent, indoor, cosy, compact, European Cultural Heritage and easily accessible
Overseas	Also affluent, likely to be aspirational.

The study also defined the characteristics of each of the four touring types of holidays:

- Fly drive – most affluent profile and yields the highest spending per night. Most affiliative type of holiday. Most information hungry.
- Caravanners are more concentrated in the older lower segments and have the lowest yield per person per night. Rely on past experience and motoring club magazines.
- 4WD enthusiasts are more concentrated in the mid-life and older more affluent segments.
- Accommodated touring – couples and families, like plenty of activities. This is an affiliate type of holiday but the external environment (activities) has more of a role than the fly/drive holiday.

5.3.2 Drive Market Summary

This study was the result of a review of all current research and was designed to assist Tourism Queensland in gaining a better understanding of the drive market.

The study defined the four core segments of the domestic drive market.

The Short Break Market:

- Typically within 200km (400km return trip)
- Primarily “mono-destinational”
- Mostly intrastate (91%)
- High volume
- Lowest average spend (around \$240 per person per trip)
- Growing in Qld at 6% (numbers) and 13% (expenditure)
- Total worth = \$1.5 million

The Short Tour Market:

- Typically within 800km
- Mostly intrastate (70%)
- High volume
- Low average spend (around \$565 per person per trip)
- Declining in Queensland in numbers by 8% and increasing slightly in expenditure by 1%
- Total worth = \$0.9 million

The Big Tour Market:

- Mostly families and working couples
- Almost equal intrastate (49%) and interstate (51%)
- Very diverse market with a range of travel patterns
- High average spend (over \$1,400 per person, per trip)
- Total worth = \$1.5 million

The Grand Tour Market:

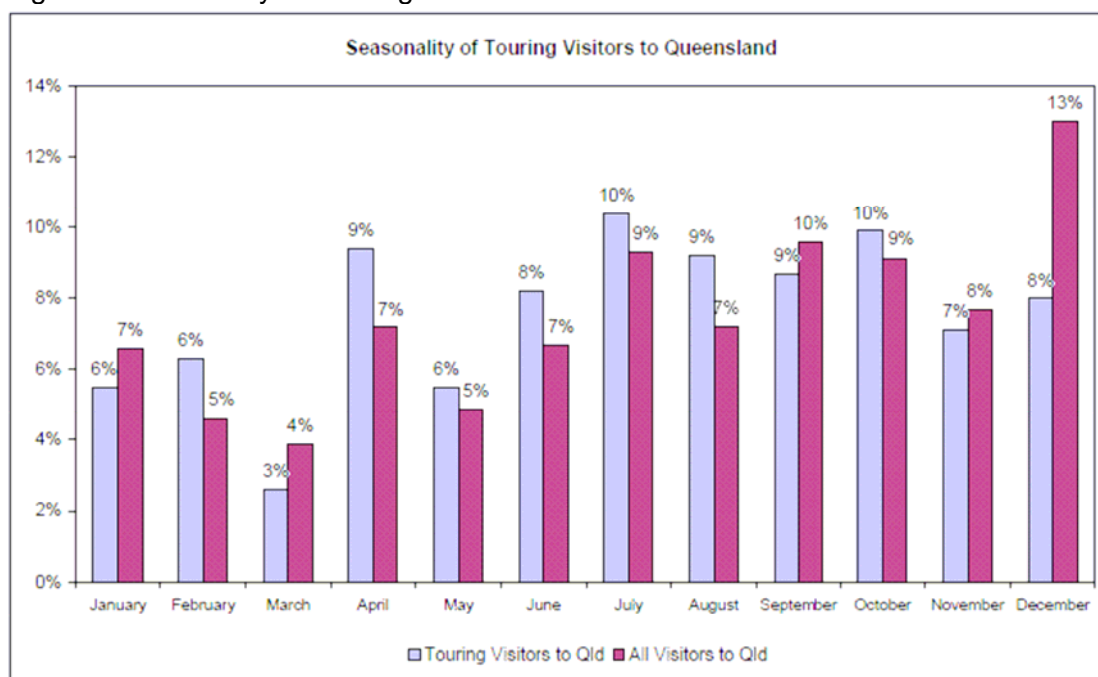
- The “trip of a lifetime”
- Primarily interstate (71%)
- Mostly older retired couples from the southern states
- Smallest market (2% of all drive visitors to Queensland)
- Highest overall spend (over \$2,700 per person per trip)
- Growing steadily (9%)
- Total worth = \$0.6 million
- Very important market for regional Queensland, particularly Outback.

Seasonality

Touring visitors¹ were more likely than all visitors to Queensland to travel outside peak holiday times (May, June, July, August, and October).

¹ “Touring visitors” to Queensland are people who described their last trip as, “toured around by car and discovered things at my own pace”. “All visitors” to Queensland are people who travelled to Queensland on their last trip.

Figure 5 Seasonality of Touring Visitors to Queensland

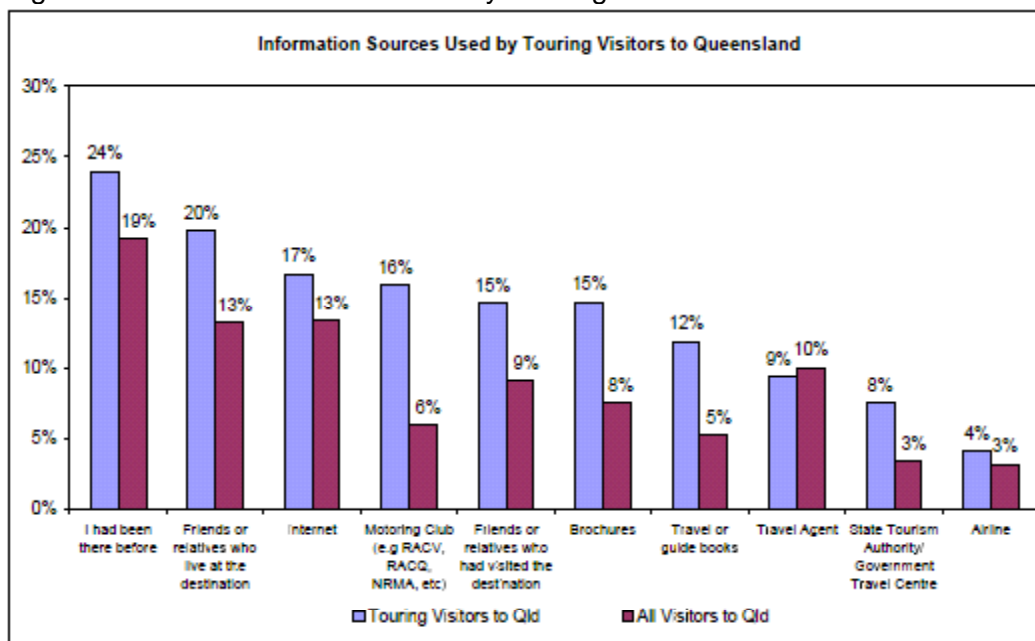


Source: Tourism Queensland, The Drive Market, year ending June 2004.

Information Sources

Previous knowledge, word of mouth, the internet and motoring clubs are the most common information sources used by touring visitors to Queensland. Queensland touring visitors consult more information sources than all visitors to Queensland.

Figure 6 Information Sources Used by Touring Visitors to Queensland

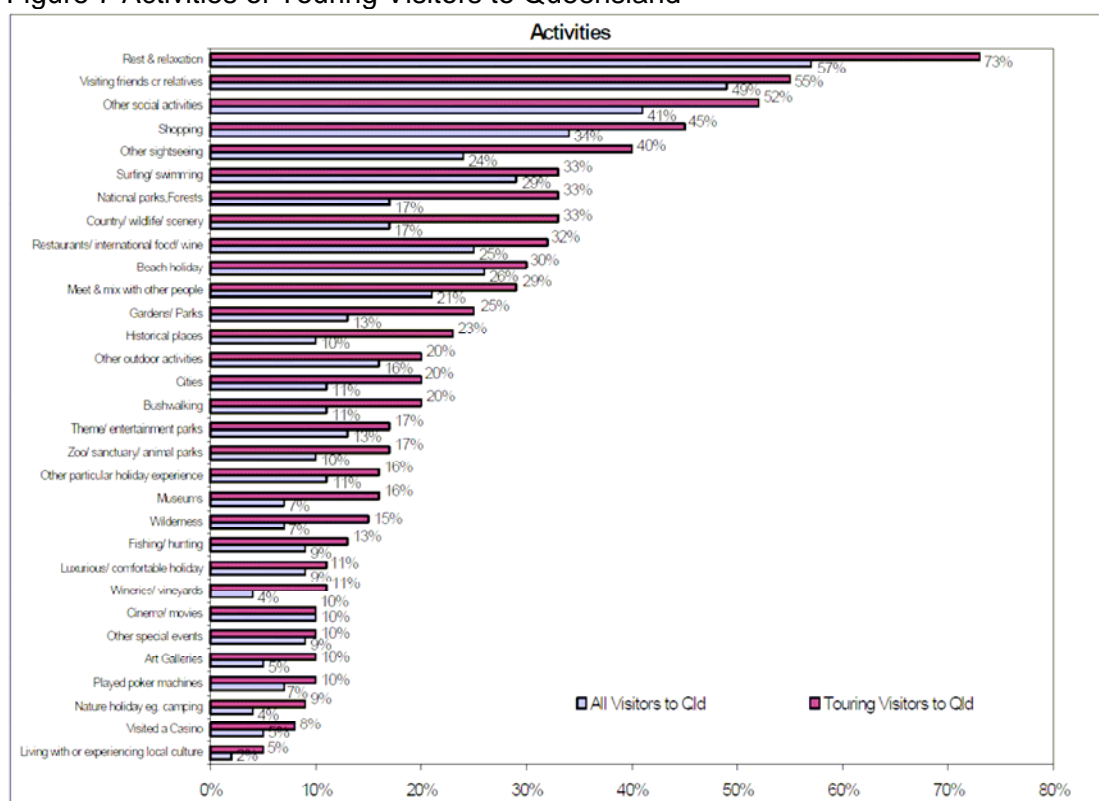


Source: Tourism Queensland, The Drive Market, year ending June 2004.

Activities

Touring visitors to Queensland were more likely than the average visitor to Queensland to participate in a number of activities, particularly nature-based activities and visiting historical places.

Figure 7 Activities of Touring Visitors to Queensland



Source: Tourism Queensland, The Drive Market, year ending June 2004.

5.3.3 Queensland Road Travellers Survey

Enhance Management was commissioned by Tourism Queensland to develop an understanding of the Queensland self-drive market. Questionnaires were mailed to Big 4 Holiday Parks in Queensland over seven waves. Park Managers were requested to distribute questionnaires to travellers who met the following criteria:

- Did not live within 40km of the Park;
- Were not travelling for business purposes; and
- Had not completed the questionnaire at another Big 4 Park.

The study's main findings included:

- The length of stay in Queensland can be separate into two main groups:
 - 1-2 weeks (21%)
 - 1-2 months (21%)
- More than 40% visited eleven or more locations during their trip.
- 39% of travellers spent 1-6 months planning their trip before leaving home
- 32% of travellers spent more than 6 months planning their trip before leaving home
- The longer travellers were away, the less likely they were to book accommodation and the more likely they were spend increased time planning.
- 49% made no firm plans for activities.
- 60% of planning was completed before leaving home.
- The main sources of information were:
 - Maps (48%)
 - Brochures from Motoring Organisations (47%); and
 - Previous knowledge (44%).
- 48% of travellers visited a VIC whilst on the road.
- 50% of travellers intended to definitely return to Queensland in the future.

5.3.4 Road Travellers Study

The purpose of the Road Travellers Study was to identify the means by which road travellers seek to receive information while travelling within Queensland. The study involved focus groups with people who had travelled on major routes in Queensland over the past twelve months and telephone interviews.

The main findings of study include:

- People have clear preferences in the amount of pre-planning they do before a road trip.
- For attractions/places to visit/attractions sources of information include: Tourism Queensland, word of mouth, NRMA/RACQ/RACV and travel guides.
- For route information sources of information include: Queensland Motoring Guide, NRMA/RACQ/RACV maps, other maps (BP, Readers Digest).
- There is a demand for more 'locally branded' information.
- People do use rest areas while they are travelling and will read information boards at these areas.
- Although travellers claim that information boards may have some influence on what they do that day, the reality is that the information boards have a very low impact on actual behaviour.
- Local tourist information centres form a critical part of the road travelling experience and have the opportunity to influence decisions at all levels including the decision to stay longer in one place, whether to visit local attractions and which ones and what accommodation places to use.
- What appeals more than random information boards is a themed information system/route which offers:
 - Pre-planning before the trip
 - Builds expectations;
 - Provides security;
 - Yet offers the adventure and exploration many travellers are looking for;
 - Implies quality standards;
 - Adds enjoyment to the trip.

5.4 Department of Main Roads Research

The following estimates are based on Department of Main Roads Annual Average Daily Traffic Counts and assume 1.7 occupants per vehicle:

- There are at least 19 million long-haul light vehicles on the route from the New South Wales border to Brisbane per annum, carrying an estimated 33 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 1.7%, resulting in a minimum of approximately 560,000 visitors in 2003.
- There are at least 2.4 million long-haul light vehicles on the route from Brisbane to Maryborough per annum, carrying an estimated 4.1 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 2.4%, resulting in a minimum of approximately 97,000 visitors in 2003.
- There are at least 990,000 long-haul light vehicles on the route from Maryborough to Rockhampton per annum, carrying an estimated 1.7 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 53.5%, resulting in a minimum of approximately 900,000 visitors in 2003.
- There are at least 718,000 long-haul light vehicles on the route from Rockhampton to Townsville per annum, carrying an estimated 1.2 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 47.3%, resulting in a minimum of approximately 578,000 visitors in 2003.
- There are at least 885,000 long-haul light vehicles on the route from Townsville to Cairns per annum, carrying an estimated 1.5 million people. The 1999 Strategic

Tourism Roads Study estimates tourist traffic on this route at around 16.2%, resulting in a minimum of approximately 244,000 visitors in 2003.

5.5 The Road Travel Experience

In tourism, roads are more than a means of travelling from one place to another. For a successful Drive Marketing Framework to be achieved, the road travel experience needs to be viewed as part of the total holiday experience. Getting there, for many road based tourists, is as important as arriving.

Soft tourism infrastructure therefore potentially plays an important role in not only enticing visitors to drive to a destination but providing them with information and ideas for travel experiences in the region. This can lead potentially to increased overnight stays and a higher level of visitor satisfaction.

Tourism Queensland, as the State Tourism Organisation, works to link the customer to the product. This occurs at a regional level in cooperation with the Regional Tourism organisations through the regional brochures, trade and travel shows, PR and media and in product development. At a multi-regional and whole of state level, Tourism Queensland fills the market gap by delivering information and products to the market that cross regional boundaries. This includes multi-regional brochures including:

- The Queensland Motoring Guide
- South-East Queensland Country
- Brisbane to Southern Barrier Reef Motoring Guide

TQ also delivers a whole state web presence through Queensland Holidays and will soon be developing a dedicated motoring site. PR and media for multi-region and whole of state products also come through Tourism Queensland.

5.6 Destination Management Plans

Regional and multi-regional planning frameworks drive Tourism Queensland's actions in the drive market. At a regional level the Destination Management Plans (DMPs) provide the framework to deliver for the drive market. The Table 6 highlights the priority actions and markets for the drive market at a destination level from the twelve DMPs.

This information was put together following a review of the twelve DMPs in Queensland. RTOs crossed by the Pacific Coast Touring Route are shaded.

Table 6: Destination Management Plans and Their Role in Drive Development

	PRIMARY MARKETS	DRIVE MARKETING	DRIVE DEVELOPMENT
BRISBANE	Short-Break Drive Short-Break Fly MICE Special Events	SEQ Country Touring Guide	Develop scenic drives Directional and Interpretation signage
GOLD COAST	Beach Holidays Education Wine Tourism	SEQ Country Touring Guide	Directional and Interpretation signage
SUNSHINE COAST	Beach Holiday (Drive) Short-Break (Drive) Business Tourism	SEQ Country Touring Guide Brisbane to Southern Great Barrier Reef Motoring Guide and campaign	Directional and Interpretation signage Sense of arrival signage
SEQ COUNTRY	Short-Break drive Special Interest Long-haul drive Group Tour Daytrips	SEQ Country Touring Guide Position SEQC as part of Drive Qld experience Develop packages for niche drive markets	Develop Country Way, Rural-Get-a-Way and Bunya Country Tourist drives Better understand drive market Develop signage and drive collateral Directional and Interpretation signage Signage for local tourist drives Improve road infrastructure
BUNDABERG	Big Tour (Drive) Grand Tour (Drive) Beach Holiday (Drive)	Brisbane to Southern Great Barrier Reef Motoring Guide and campaign International self-drive packages	Consistent signage Directional and Interpretation signage
CENTRAL QLD	Big Tour (Drive) Grand Tour (Drive) VFR Short Break	Position CQ as part of Drive Qld experience Marketing to grow share of drive market Brisbane to Southern Great Barrier Reef Motoring Guide and campaign	Directional and Interpretation signage 4WD routes & tourist drives Roads into National Parks
FRASER COAST	Big Tour (Drive) Grand Tour (Drive) VFR	Position CQ as part of Drive Qld experience Brisbane to Southern Great Barrier Reef Motoring Guide and campaign Stimulate off-peak travel through drive market	Directional and Interpretation signage
MACKAY	Big Tour (Drive) Grand Tour (Drive)	Package Mackay as part of the Queensland touring experience Promote the Queensland coastal drive experience Develop product for fly/drive and rail/drive markets	Improve road access Themed fly/drive packages Fly/drive accommodation development 4WD tours
OUTBACK	Big Tour (Drive) Grand Tour (Drive) Special Interest	Increase awareness of self-drive options for emerging international markets Product development for drive market Cooperative marketing program for drive market	Improve links between touring routes One-way car-hire options Road access to remote sites Links between signage and collateral Maintain existing signage Directional and Interpretation signage

Table 6: Destination Management Plans and Their Role in Drive Development

	PRIMARY MARKETS	DRIVE MARKETING	DRIVE DEVELOPMENT
WHITSUNDAYS	Island Holidays Couples Honeymoon	Look at emerging niche markets	WHAMB signage strategy Disperse tourist flow across the region Expand the Proserpine VIC
TOWNSVILLE	Island Holiday Short Tour (Drive) Big Tour (Drive) Grand Tour (Drive)	Enhance awareness of Townsville with primary markets including Drive Maintain and grow the drive market through tailored marketing activity	Enhance awareness of themed routes (Overlanders Way and Great Green Way) Improve directional and interpretation signage
TROPICAL NORTH QUEENSLAND	Beach Holidays Adventure Indulgence Grand Tour Regional Drive market	Develop campaigns to attract primary markets Develop packages to link areas outside of Cairns	Improve visitor access to remote areas Great Green Way (TTNQ) Regional Tourism Drives (TTNQ)

Key opportunities for Pacific Coast Touring Route include:

- The route carries 80% of all drive market visitors, but as repeat visitation grows, there needs to be some communication to both new and old markets informing them of the new experiences on offer along the route.
- Potential new market segments include the fly/drive, accommodated touring (multi-market segment) and International markets.
- Working with RTOs along the route to develop itineraries and regional touring circuits.
- Improve fly/drive options, train/drive options etc.
- Links with SEQ Country Touring Guide, Brisbane to Southern Great Barrier Reef Motoring Guide, International self-drive packages.
- Links to 4WD routes and tourist drives along the eastern coast e.g. links to Fraser Island etc.
- Links to Great Green Way and Regional Tourism Drives (TTNQ).
- Upgrade of website.
- Identify new points of interest and conduct photo shoots to communicate the story to the market through PR.

5.7 Comparative Review

Table 7 gives a comparative review of the five corridors including visitor profiles.

Key points of difference for the Pacific Coast Touring Route include:

- It's existing status as National Highway 1.
- The high level of awareness of the Bruce Highway.
- The size and maturity of the service links and towns along the corridor.
- The wide diversity of travel product available along the corridor.
- The wide number of RTO Regions it crosses and the variety of travel themes.

Table 7: Comparative Review

	Pacific Coast Touring Route	Country Way	Leichhardt	Great Inland Way	Capricorn
Route Type	- National Highway 1 Touring Route - High volume - High awareness	- Alternative to Highway 1 - Low volume - Low awareness	- Point to point - High awareness - High commercial road traffic including freight	- Touring Route - Comparable to role played by Matilda Highway	- Point to point - Emerald as a focal point - Multi-directional flow of traffic
National Linkages	VIC / NSW (Highway 1 / New England Highway)	NSW (via Highway 17 / New England Highway)	NSW / Newell Highway	VIC/NSW alternative north/south route to Highway 1	NA
Destination Focus	Cairns / Tropical Queensland / South-East Queensland (multi-hub)	Rockhampton Central Queensland South-East Queensland	Rockhampton / Dubbo (New South Wales)	North Queensland Central Queensland Central New South Wales	Rockhampton Emerald/Carnarvon Barcaldine/Rockhampton
Service Hubs	Major cities along the East Coast	Numerous small towns	Dispersed small towns (small numbers)	Regional service centres	Emerald / Barcaldine / Rockhampton
Significant Attractions	Six major coastal destinations	Wine regions – South Burnett/Granite Belt National Parks	Narrow product base Mining (Moura) and heritage (Miles)	North Queensland / Central Queensland Carnarvon Gorge Sapphire Gemfields	Carnarvon Gorge Sapphire Gem Fields
Current Visitor Markets	Short breaks (Qld) Fly/Drive Point to point (hubs) Leisure/holiday	Touring market	Point to point Touring market Caravans / Campervans	Touring market (Adventure)	Touring market
Organisational structure	No Committee – RTO focussed	Use existing Committee structure	Current committee	Logistical issues. Review Committee role/structure	Support existing Committee with DTSC (Emerald)
Product development (proposed)	- Destination service hubs - No dedicated signage - Regional touring circuits - Improve tour options (fly/drive)	- Improve small towns service infrastructure - Things to see and do - Accommodated touring market - No dedicated signage proposed	- Review service opportunities along road corridor - No dedicated signage proposed	- Improve service / tourism / town / reassurance signage - Small towns service infrastructure e.g. improve interpretation in VICs - Caravan / camping market	- Emerald service hub - Support existing site regional / town signage strategy. - Improve interpretation in VICs. - Fly / Drive market development
Marketing (proposed)	- Focussed on RTO destinations - Regional links	- Review brochure - Focus on VICs and interpretive material	- Point to point route map - Service options - Review brochure	- Revise brochure - RTO insert options - Map	- New map option - Destination marketing of sub regions

6. CORRIDOR PRODUCT AUDIT

Outlined below is an audit of the product, services and attractions located along the Pacific Coast Touring Route.

6.1 Major Products/Attractions

Town / City	Attraction
Sydney	Aboriginal and Tribal Centre
	Aboriginal rock art at Ku-ring-gai Chase National Park
	Aquatic Centre
	Australian Museum
	Bondi to Bronte Walk
	Capitol Theatre
	Centennial Park
	Circular Quay (ferry rides)
	Cockle Bay Wharf
	Darling Harbour
	Fox Studios
	Hawkesbury River
	Heritage Walk
	Kirribilli House
	Markets
	National Park
	Star City
	Sydney Observatory
	Sydney Olympic Park home of the 2000 Sydney Olympic Games
	Sydney Tower
	Taronga Zoo
	Taronga Zoo
The Rocks	
Visit one of the Sydney Harbour islands	
Central Coast	Art Galleries & Craft centres
	Australian Reptile Park
	Basin Camping Area
	coastal & hinterland bush walking trails
	Feeding The Pelicans
	Firescreek Winery
	Glenworth Valley Horse Riding
	Koolang Astronomical Observatory
	Markets
	National Parks and Reserves
	North Head Lighthouse
	Sandstone Sculptures
	secluded beaches
	sheltered coastal waterways
	spectacular estuaries
Springfield Trails	
the Hawkesbury River	

Town / City	Attraction
	Visitor information centres
	Yarramalong Macadamia Nut Farm
North Coast	Annual whale migration between Port Stephens and Coffs Harbour
	Aquarium at Everglades
	Art Galleries & craft centres
	Australian Rainforest Sanctuary
	Beaches
	Big Banana Theme Park Horticultural World
	Big Buzz Fun Park
	Billabong Koala And Aussie Wildlife Park
	Camping areas
	Coffs Harbour Zoo
	Coffs Harbour's Big Banana
	Dolphins at Port Stephens or swim with the dolphins at Forster
	Dorrigo Rainforest Centre
	Dorrigo Skywalk
	Ellenborough Falls, one of the southern hemisphere's highest waterfalls
	Fly Point Halifax Park Aquatic Reserve
	Golf Courses
	Grandis The Tallest Tree In NSW
	Historical sites
	Horse riding
	Lighthouses
	Lookouts
	Lorne Valley Macadamia Farm
	Markets
	Museums
	Nambucca Valley Model Railway
	National Parks
	Nature reserves
	Rainforests of the Great Dividing Range
	Sea Acres Rainforest Centre
	Springfield Trails
	Visitor information centres
	Walking trails
	Wineries
Port Stephens	Arts & crafts
	Historical sights
	Museums
	National Park – Tomaree Headland
	See the Dolphins
	The largest coastal sand dune system in Australia
	Tilligerry Creek where koala sighting is almost guaranteed
	Underwater world
	Whale watching
Coffs Coast	Dolphins and other marine animals

Town / City	Attraction
	Golf Course
	Offshore reefs, islands and a variety of marine habitats offer superb snorkelling and diving
	Skywalk
	The Solitary Islands Marine Park
Northern Rivers	Beaches
	Byron Bay
	Camping areas
	Cape Byron Bay Lighthouse
	Crystal Castle
	Galleries
	Historical sites
	Humpback Whale Migration
	Iluka Rainforest
	Jabiru Geenbeebeinga Wetlands
	Julian Rocks Aquatic Reserve
	Killen falls
	Lake Ainsworth
	Lookouts
	Markets
	Most easterly point of Australia
	Mount Warning
	Museums
	National Parks
	Nature Reserves
	Protesters Falls
	Rainforest Secrets
	Richmond River
	Sailing in Ballina
	Summerland Aquarium
	Susan Island
	The Alternative Nimbin
	The Clarence River
	Tropical Fruit World Festivals
	Visitor information centres
	Walking tracks
Gold Coast	Beaches
	Golf Courses
	Shopping
	Theme Parks
	Wineries
Brisbane	Customs House
	City Hall
	Queens Street Mall
	Southbank
	Galleries
	Museums
	Boondall Wetlands
	Brisbane Botanic Gardens

Town / City	Attraction
	Brunswick Street Mall
	Lone Pine Koala Sanctuary
	Science centre
	Cathedrals
	XXXX Brewery
	Roma Street Parklands
	Day trips to Stradbroke Island, Bribie and Moreton Island
Sunshine Coast	State Forests
	Beaches
	Coloured Sands, Rainbow Beach
	Gold mining and historical museum in Gympie
	Heritage Railway
	Timber Museum
Maryborough	Heritage Gateway
	Museum
	Markets
	Heritage Trail
	Model Steam Rides
	Queen's Park
	Heritage Precinct
Hervey Bay	Animal Sanctuaries
	Art Galleries
	Botanic Gardens
	Marine Displays
	Museum
	4WD tours of Fraser Island
	Fishing
	Watersports
	Dolphin cruises
	Whale watching
Bundaberg	Rum Distillery
	Botanic Gardens
	Hinkler House
	Historical Museum
	Railway Museum
	River Cruises
	Tropical Wines
Rockhampton	Custom's House
	Botanic Gardens
	Mt Archer Environmental Park
	Art Gallery
	Tropic of Capricorn Spire
	Zoo
	Heritage Walks
	Rodeo
	Sale Yards
	Capricorn Caves

Town / City	Attraction
	Mt Hay Gemstone Park
	Dreamtime Cultural Centre
Yeppoon	Koorana Crocodile Farm
	Singing Ship Lookout
	Water activities
	Day trip to Great Keppel Island
Agnes Water / Town of 1770	Museum
	Beaches
	Day trip to Lady Musgrave Island
Gladstone	Gladstone Marina
	Port of Gladstone
	Auckland Hill Lookout
	Art Gallery
	Museum
	Craft
	Barney Beach
	Toondoon Botanic Gardens
	Auckland Creek Environmental Zone.
	Alumina Smelter
Mackay	The Lagoons
	Mackay Cemetery Walk
	Heritage Walk
Airlie Beach	Beaches
	Markets
	Water activities
Townsville	National Park
	Beaches
	Reef HQ Aquarium
	Museum of Tropical Queensland
	Billabong Sanctuary
	Jupiters Casino
	Town Common
	Galleries
	The Strand
	Day trips to Great Barrier Reef
Cairns	Art gallery
	Botanic gardens
	Cairns Esplanade
	Markets
	Beaches
	Rainforest Dome
	Tropical Zoo
	Golf Courses
	Skyway Rainforest Cable Way

Town / City	Attraction
	Tjapukai Aboriginal Cultural Park

The Pacific Coast Touring Route passes through four different bioregions of Queensland These include the Wet Tropics, Central Queensland Coast, Brigalow Belt and South East Queensland. The characteristics of each of those bioregions is outlined in Table 7.

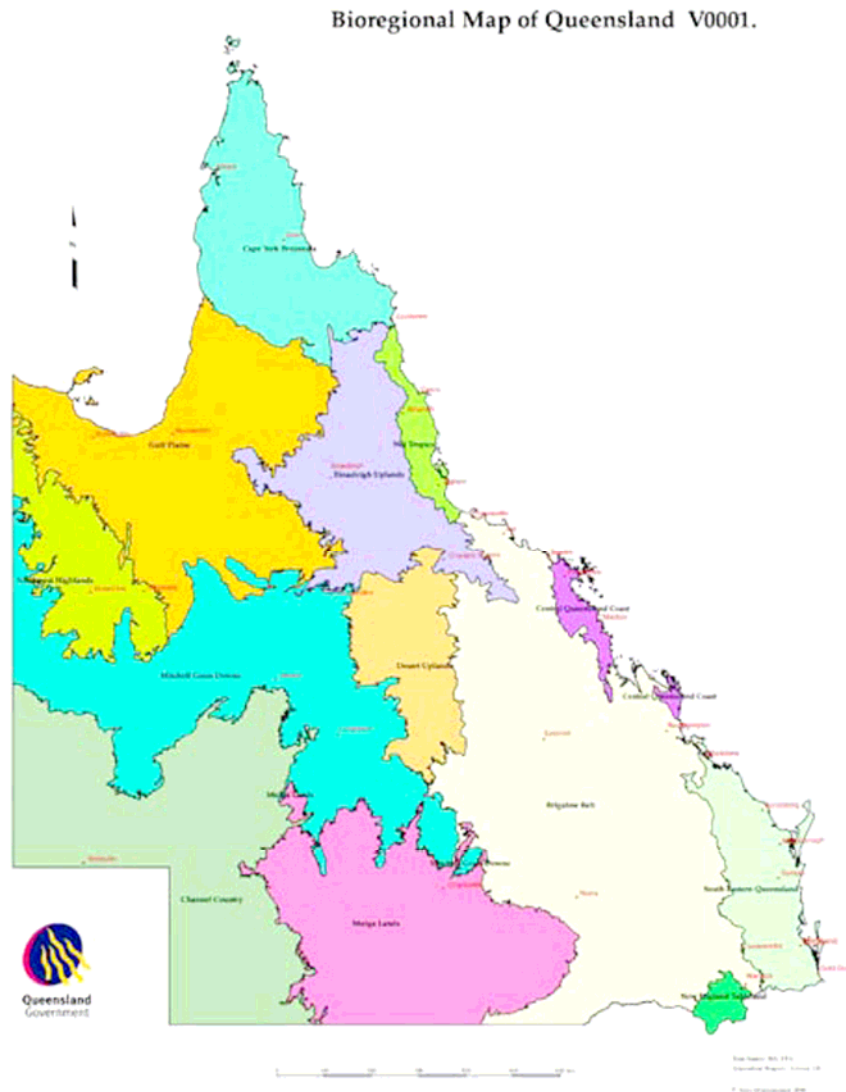
Table 8 Biogeographic Regions

Bioregion	Description	Drive Tourism Route	Province/s
Mulga Lands	<ul style="list-style-type: none"> ▪ Dominated by flat to undulating plains and low ranges. ▪ Most of the land is used for cattle and sheep grazing, with lesser areas used for other purposes including conservation, mining and oil and gas production. ▪ The area is sparsely populated. 	Great Inland Way	<ul style="list-style-type: none"> ▪ West Balonne Plains / Eastern Mulga Plains
Wet Tropics	<ul style="list-style-type: none"> ▪ Situated along the tropical east coast of northern Queensland/ ▪ Dominated by rugged rainforested mountains, including the highest mountain in Queensland. ▪ Also includes extensive plateau areas along its western margin, as well as low lying coast plains ▪ Includes major population centres. 	Pacific Coast Touring Route Great Inland Way	<ul style="list-style-type: none"> ▪ Herbert/Paluma-Seaview/Innisfail/ ▪ Atherton/ Bellenden Ker-Lamb/Macalister
Central Queensland Coast	<ul style="list-style-type: none"> ▪ Centered upon the high-rainfall coastal lowlands, hills and ranges. ▪ Receives a high average annual rainfall. ▪ The major land uses and industries include sugar cane, cattle grazing and tourism. ▪ Mackay is the major service centre for the bioregion. 	Pacific Coast Touring Route	<ul style="list-style-type: none"> ▪ Proserpine-Sarina Lowlands
Einasleigh Uplands	<ul style="list-style-type: none"> ▪ The region straddles the Great Dividing Range in inland north-east Queensland. ▪ Largely consists of a series of ranges and plateau surfaces. ▪ Major population centres include Charters Towers, Mareeba, Herberton, Ravenshoe, Mount Surprise and Croydon. ▪ The major land use is extensive grazing but mining and cropping are locally significant. 	Great Inland Way	<ul style="list-style-type: none"> ▪ Broken River / Undara-Toomba Basalts / Herberton-Wairuna
Desert Uplands	<ul style="list-style-type: none"> ▪ Lies in central northern Queensland, straddling the Great Dividing Range. ▪ Sandstone ranges and sand plains dominate the bioregion. ▪ Major population centres include: Barcaldine and Aramac. ▪ Dominant land use is cattle grazing. 	Capricorn Highway	<ul style="list-style-type: none"> ▪ Alice Tableland
Brigalow Belt	<ul style="list-style-type: none"> ▪ Major agricultural and pastoral area. ▪ Characterised by a range of ecosystems including eucalypt forest and woodland, grassland, dry 	Leichhardt Highway	<ul style="list-style-type: none"> ▪ Barakula / Mooni-Barwon Interfluvium / Mount Morgan Ranges / Southern Downs / Weribone High / Moonie R – Commonon Creek Floodout /

Bioregion	Description	Drive Tourism Route	Province/s
	<p>rainforest, cypress pine woodland and riparian communities.</p> <ul style="list-style-type: none"> ▪ Coal mining is also a significant industry. ▪ Important regional centres include Goondiwindi, Dalby, Roma, Biloela, Emerald, Rockhampton and Ayr. 	<p>Country Way</p> <p>Pacific Coast Touring Route</p> <p>Capricorn Highway</p> <p>Great Inland Way</p>	<p>Macintyre/Wier Fan</p> <ul style="list-style-type: none"> ▪ Eastern Darling Downs / Banana-Auburn Ranges ▪ Mount Morgan Ranges ▪ Marborough Plains / Isaac-Comet Downs / Nebo-Connors Ranges / Northern Bowen Basin / Bogie River Hills / Townsville Plains ▪ Mount Morgan Ranges / Banana-Auburn Range / Dawson River Downs / Woorabinda / Basalt Downs / South Drummond Basin ▪ Balonne-Culgoa Fan / Weribone High / Southern Downs / Carnarvon Ranges / Basalt Downs / Issa-Comet Downs / South Drummond Basin
<p>South East Queensland</p>	<ul style="list-style-type: none"> ▪ The coastal strip and adjacent hills and ranges of northern New South Wales and southern Queensland are among the richest parts of Australia for flora and fauna. ▪ Major physiographical features are a coastal plain of varying width, and hills and ranges. ▪ The major industries of the bioregion include service industries, tourism, agriculture, manufacturing and timber produced from both plantations and native forests. 	<p>Pacific Coast Touring Route</p>	<ul style="list-style-type: none"> ▪ Southern Coastal Lowlands, Southeast Hills and Ranges, Gympie Block, Burnett-Curtis Coastal Lowlands, Burnett-Curtis Hills and Ranges.

Source: Adapted from “The Conservation Status of Queensland’s Bioregional Ecosystems”, Sattler and Williams (eds.), 1999.

Figure 8 : Bioregions of Queensland



Source: Queensland Government, 2004.

6.2 Thematic Linkages

These thematic linkages can be developed up to deliver interpretative experiences in visitor information centres and be included in brochures and maps.

- Resort cities
- Beautiful beaches
- Island getaways / barrier reef
- Coastal cities
- Rural hinterland
- National parks
- Marinas
- Heritage (Town of 1770)
- Agricultural scenery
- Working farms (sugar / beef)
- Themed touring loops

- Major visitor attractions
- Events
- Adventure activities

7. HARD INFRASTRUCTURE AUDIT

7.1 Main Roads Service Infrastructure (e.g. Rest Areas)

There are 57 motorist rest areas along the Pacific Coast Touring Route and thirteen heavy vehicle rest areas.

Rest Area Reference No.	Nearest Town	Distance From Nearest Town	Controlling Auth.
31	Ayr	1kmS	L
632	Ayr	38kmS	MR
646	Ayr	8.8kmNW	MR
710	Ayr	6.3kmN	L
646	Ayr	8.8kmNW	MR
278	Bowen	4.3kmS	MR
608	Bowen	45.0kmN	MR
278	Bowen	4.3kmS	MR
272	Brisbane	City Hall	L
274	Brisbane	City Hall	L
315	Brisbane City Hall	4.1kmW	L
316	Brisbane City Hall	5.9kmW	L
472	Burleigh Heads	0.8kmSE	L
147	Caboolture	0.4kmS	L
687	Cairns	14.1kmN	MR
648	Calliope	9.2kmN	MR
38	Cardwell	21kmN	MR
715	Cardwell	Town	L
38	Cardwell	21kmN	MR
20	Childers	11kmE	MR
440	Childers	7.0kmN	L
473	Coolangatta		L
475	Coolangatta		L
21	Gin Gin	2.5kmNW	MR
587	Gin Gin	22kmN	W
21	Gin Gin	2.5kmNW	MR
43	Gordonvale	Town	F
161	Gordonvale	9.8kmW	L
16	Gympie	6kmS	MR
503	Gympie	5.9kmN	L
507	Gympie	3.0kmS	L
686	Gympie	0.4kmS	L
694	Gympie	3.0kmE	L
695	Gympie	1.5kmE	L
698	Gympie	Town	L
36	Ingham	11.1kmS	MR
612	Ingham	16kmS	MR
714	Ingham	0.4kmN	MR
36	Ingham	11.1kmS	MR
78	Innisfail	36.0kmW	P
326	Innisfail	4.0kmN	L
326	Innisfail	4.0kmN	L

Rest Area Reference No.	Nearest Town	Distance From Nearest Town	Controlling Auth.
388	Mackay	City Gates	L
660	Marlborough	1.0kmW	MR
207	Miriam Vale	35.7kmS	MR
207	Miriam Vale	35.7kmS	MR
192	Port Douglas	Town	L
602	Proserpine	26.0kmW	W
603	Proserpine	Town	L
634	Proserpine	25.0kmE	L
390	Sarina	South Side	L
470	Surfers Paradise	2.0kmN	L
716	Tully	0.1kmS	L
279	Townsville	58.2kmSW	MR
389	Sarina	North Side	L
509	Caboolture	1.0kmN	L
609	Townsville	24.9kmN	L

7.2 SWOT Analysis

The following SWOT analysis was developed in consultation with Tourism Queensland and was updated following consultation with the Pacific Route Steering Committee.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ▪ National Touring Route ▪ Fully sealed route (north-south). ▪ Recognised as a state strategic touring route. ▪ Strong product /service centres ▪ High route awareness ▪ Tourism Queensland have developed three motoring guide brochures which include segments of the route. ▪ Two independent route brochures have been produced ▪ Diverse product along the route ▪ Considered to have above average road quality ▪ Destination Management Plans have been prepared for each RTO ▪ A number of RTOs have dedicated drive market strategies e.g. Far North Queensland. 	<ul style="list-style-type: none"> ▪ Length and diverse nature ▪ Little buy in from RTOs ▪ Logistical issues for organisational matters e.g. number of LGAs, RTOs ▪ Not considered to be a themed touring route at this stage ▪ No strategic plan for the route ▪ No business plan exists ▪ No marketing plan exists ▪ No Corridor Management Plan ▪ Flooding occurs at some locations along the route ▪ High percentage of heavy commercial vehicles ▪ Product/service gaps in sections of the highway ▪ No route champion.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ▪ Potential market segments include short break, fly/drive, point to point, accommodated touring (multi-market segment) ▪ Work with RTOs along the route to develop and market the different service hubs along the route. ▪ Develop regional touring circuits. ▪ Improve fly/drive options, train/drive options etc. ▪ Links with SEQ Country Touring Guide, Brisbane to Southern Great Barrier Reef Motoring Guide, International self-drive packages. ▪ Links to 4WD routes and tourist drives along the eastern coast e.g. links to Fraser Island etc. ▪ Links to Great Green Way and Regional Tourism Drives (TTNQ) ▪ Upgrade of website ▪ Cooperative marketing along the corridor 	<ul style="list-style-type: none"> ▪ Number of LGA and RTO stakeholders. ▪ Involves eleven RTOs, which all have competing marketing plans. ▪ Challenges associated with establishing a management/marketing group and maintaining continuity of this group.

7.2.1 Commentary

The key strengths focus on the fact that the Pacific Coast Touring Route is a National touring route, travelling through three states and it's strong product and service centres. Weaknesses tend to focus on the current low level of buy in from RTOs and the lack of a strategic plan, business plan, marketing plan and corridor management plan for the route.

Opportunities are centred around the development of the different service hubs along the route and the upgrade of the Pacific Coast Touring Route Website. Threats are focussed around the involvement of each of the RTOs, all of which have competing marketing plans and the challenges associated with establishing a management / marketing group.

7.3 Partnerships

Response to the stakeholder survey indicated that community, government, operator and consumer partnerships are critical to the future development of the Pacific Coast Touring Route. Outlined below is an overview of key partnerships which need to be further developed in Stage Two of the Drive Tourism Program.

- RTOs and Tourism Queensland
- Motoring Organisations
- Map producers
- All businesses along the route to use brand
- Other routes to promote Queensland
- EDOs, tourism officers and VICs along the route
- Major sponsor or partner
- DMR, LGAs and Queensland Transport
- Freight companies – protocol for safe travel
- 4WD Clubs
- CMCA and Caravan Clubs

8. NEXT STEPS

Following a meeting with key stakeholders on 16th February 2005, the following opportunities and action plan was agreed:

1. Multiple Buy-in Layers

The Pacific Coast Touring Route should be presented as a strategic part of the Queensland Drive Tourism Program. Action needs to be undertaken to present the corridor as representing three levels or layers of buy in. At one level the Pacific Coast represents a state wide touring experience. At a second level the individual sections or service centres along the corridor need to be promoted as 'biteable chunks'. At a third level, the regional links, loops and drive itineraries need to be developed.

2. Value-add to Existing Service Hubs Along the East Coast

Build and value-add to the existing service hubs along the corridor. This involves developing specialised experiences, itineraries, touring loops and fostering the role played by the network of visitor information centres along the route (interpretation, information, etc.).

3. Raise Awareness of Hidden Secrets

Focus on raising awareness of the hidden secrets and new products along the Route (for example, fishing, access to National Parks). This will assist in the development of themes and unique experiences for each of the hubs along the Pacific Coast Touring Route. It will also help to infill product gaps.

4. Value Add to Existing Marketing / Promotional Tools

Utilise existing marketing tools to continue to promote the Pacific Coast Touring Route and its various segments e.g. Brisbane to Bundaberg, Brisbane to Sydney Motoring Guide, Barrier Reef, Great Green Way etc.

5. Develop a Focussed Public Relations / Media Campaign

Boost the number of media stories and photo shoots of the Pacific Coast Touring Route, particularly focussing on the different experiences offered along the Route.

6. Establish and Develop Trade Partnerships

Identify and establish partnerships with key companies which have the ability to attract and service different markets and needs along the Route. Key partnerships include Queensland Rail, car hire companies, tour companies, petrol stations, airports, aviation companies etc.

7. Develop an Electronic Presence

In order to appeal to the International market, a comprehensive website should be developed. The website would include a route planner, suggested itineraries, maps, information of the different segments of the touring route etc. This web site should be innovative and hands on.

8.1 Implementation Priorities

1. Develop regional touring circuits along the corridor.
2. Upgrade web site presence.
3. Develop an interpretation template and install interpretation panels along the corridor.
4. Advertise the corridor in key drive market publications.
5. Align with State Road Strategy initiatives including alpha numeric signage, research, marketing etc.

ATTACHMENTS

ATTACHMENT 1: STAKEHOLDER LIST

Organisation	First Name	Last Name	Phone Number	Email Address
Gold Coast Tourism Bureau	Sue	Thompson	5584 6216	suet@gctb.com.au
Brisbane Marketing	Gary	Warnock	3006 6220	gwarnock@brisbanemarketing.com.au
Tourism Sunshine Coast	John	Fitzgerald	5452 2501	gm@tsc.com.au
Fraser Coast South Burnett Regional Tourism Board	The	Manager	4122 3444	info@frasercoast.org.au
Bundaberg Region Limited	Craig	Hodges	4153 8800	c.hodges@bundabergregion.org
Gladstone Area Promotion and Development	Daniel	Rochford	4972 4000	daniel.rochford@gladstoneregion.org.au
Capricorn Tourism	Alan	Chamberlain	4927 2055	infocentre@capricorntourism.com.au
Mackay Tourism and Development Bureau	David	Phillips	4944 5888	dphillips@mackayregion.com
Tourism Whitsundays	Matthew	Williams	4946 6673	gm@whitsundaytourism.com
Townsville Enterprise	Amanda	Bruce	4726 2738	amandab@tel.com.au
Tropical North Queensland	John	McIntyre	4031 7676	john.mcintyre@tnq.com.au
South Coast Hinterland Metropolitan	Gavin	Massingham	5583 8160	Gavin.A.Massingham@transport.qld.gov.au
	Kelvin	Marrett	3834 8358	kelvin.f.marrett@mainroads.qld.gov.au
North Coast Hinterland	Grahame	Ritchie	5482 0333	grahame.j.ritchie@mainroads.qld.gov.au
Wide Bay	Graham	Duldig	4154 0203	graham.w.duldig@mainroads.qld.gov.au
Central	Greg	McTier	4931 1500	greg.m.mctier@mainroads.qld.gov.au
Mackay	Lance	Christiansen	4951 8541	lance.r.christiansen@mainroads.qld.gov.au
Northern	Brett	Martin	4720 7200	brett.e.martin@mainroads.qld.gov.au
Peninsula	Jeff	Madsen	4050 5444	jeff.r.madsen@mainroads.qld.gov.au
Gold Coast City Council	Steve	Holle	5582 8191	sholle@goldcoast.qld.gov.au
Logan City Council	John	Freeman	3826 5555	johnfreeman@logan.qld.gov.au
Brisbane City Council	Andrew	Sivjis	3403-5263	ppoed@brisbane.qld.gov.au
Pine Rivers Shire Council	Yvonne	Chapman	34806666	yvonne.chapman@pinerivers.qld.gov.au
Caboolture Shire Council	Lyn	Cooley	5420 0300 0407 834 300	CooleyL@caboolture.qld.gov.au
Caloundra City Council	Don	Aldous	5420 8200	Mayor@caloundra.qld.gov.au
Maroochy Shire Council	Joe	Natoli	54758501	mayor@maroochy.qld.gov.au
Noosa Shire Council	Bob	Abbot	5449 5200	mayor@noosa.qld.gov.au
Cooloola Shire Council	Mick	Venardos	54810800	council@cooloola.qld.gov.au
Tiaro Shire Council	Linda	Harris	41292133	info@tiaro.qld.gov.au
Woocoo Shire Council	Kev	Mahoney	4123 1616	kevm@woocoo.qld.gov.au
Maryborough City Council	Barbara	Hovard	4190 5800	mayor@maryborough@qld.gov.au
Hervey Bay City Council	Ted	Sorensen	4197 4444	teds@herveybay.qld.gov.au
Isis Shire Council	Bill	Trevor	4192 1000	trevor@isis.qld.gov.au
Kolan Shire Council	Eddie	Stone	41332000	eddies@kolan.qld.gov.au
Miriam Vale Shire Council	Tom	Jeffery	4974 6222	tgeffery@1770.net
Calliope Shire Council	George	Creed	4975 8100	csc@calliope.qld.gov.au
Fitzroy Shire Council	John	Hopkins	4931 5400	john.hopkins@fitzroyshire.qld.gov.au
Rockhampton City Council	Margaret	Strelow	4936 8000	boydj@rcc.qld.gov.au
Livingstone Shire Council	Bill	Ludwig	4939 3388	general@livingstone.qld.gov.au
Broadsound Shire Council	Cedric	Marshall	4964 5400	admin@broadsound.qld.gov.au
Sarina Shire Council	Kevin	Morgan	49648100	mayor@sarina.qld.gov.au
Mackay City Council	Julie	Boyd	49684444	mackaycc@mackay.qld.gov.au
Whitsunday Shire Council	Mario	Demartini	49450200	mayor@whitsunday.qld.gov.au
Bowen Shire Council	Michael	Brunker	47613600	mbrunker@bowen.qld.gov.au

Organisation	First Name	Last Name	Phone Number	Email Address
Burdekin Shire Council	Lyn	McLaughlin	4783 9800	lyn.mclaughlin@burdekin.qld.gov.au
Townsville City Council	Tony	Mooney	47279000	bss@townsville.qld.gov.au
Thuringowa City Council	Les	Tyrell	47738411	council@thuringowa.qld.gov.au
Hinchinbrook Shire Council	Pino	Giandomenico	4776 4600	ceo@hinchinbrook.qld.gov.au
Carwell Shire Council	Joe	Galeano	4043 9100	scs@scs.qld.gov.au
Johnstone Shire Council	Neil	Clarke	4030 2222	mayor@jsc.qld.gov.au
Cairns City Council	Kevin	Byrne	4044 3044	k.byrne@cairns.qld.gov.au
Coolangatta Visitor Information Centre	Michael	Fox	5536 7765	infocoolangatta@gctb.com.au
Gold Coast Tourism Bureau VIC	Sonia	Woodfield	5538 4419	infosurfers@gctb.com.au
Caboolture Visitor Information Centre	Lyn	Cooley	1800 833 100	info@caboolturetourism.com.au
Cooloola Visitor Information Centre	Trischa	Schapendonk	5483 5554	info@cooloola.org.au
Tiaro Craft Cottage Inc and Tourist Information Centre	Brian	Arnold	4129 2599	info@tiaro.qld.gov.au
Maryborough Fraser Island Visitor Information Centre	Tracy	Batty	4121 4111	mfivic@maryborough.qld.gov.au
Childers Visitors Information Centre	Nancy	Calder	4126 3886	calder@isis.qld.gov.au
Discovery Coast Information Centre	Greg	Realf	4974 5428	gapdl@gladstoneregion.org.au
Rockhampton Tourist and Business Information Centre	Barbara	Harwood	4922 5339	rtbi@rockhamptoninfo.com
Capricorn Information Centre	Amber	Rogers	4927 2055	infocentre@capricorntourism.com.au
Sarina Tourist Art & Craft Centre	Lesley	Ward	4956 2251	jward@mackay.net.au
Mackay Visitor Information Centre	Lee	Kozic	4944 5888	info@mackayregion.com
Whitsunday Information Centre	Annie	Atfield	4945 3711	info@whitsundaytourism.com
Bowen Visitor Information Centre	Lyn	Johnson	4786 4222	info@bowentourism.com.au
Burdekin Visitor Information Centre	Joan	Andersen	4783 5988	burdekintourism@bigpond.com.au
Townsville Southern Highway Information Centre	Nicola	Matthews	4778 3555	nicola@tel.com.au
Hinchinbrook Visitor Information Centre	Rae	Domin	4776 5211	ceo@hinchinbrook.qld.gov.au
Tully Visitor & Heritage Centre			4068 2288	tourism@qldnet.com.au
Mission Beach Visitor Information Centre	Truus	Biddlecombe	4068 7099	info@missionbeachtourism.com
Innisfail Information Centre	Betty	Graham	4061 7422	innisfailinfocentre@znet.net.au
Babinda Information Centre	Fay	Rowe	4067 1008	babindainfo@qld.chariot.net.au
Gateway Discovery Centre	Ken	Norman	4051 3588	info@tropicalaustralia.com.au
Department of State Development and Innovation - Gold Coast	Allan	Woolard	5583 7592	allan.woolard@qld.gov.au
WHAMROC	Peter	Sherlock	4957 9525	admin@whambroc.org

Organisation	First Name	Last Name	Phone Number	Email Address
State Development - Mackay	Nadine	Connolly	4967 1078	nadine.conalley@sd.qld.gov.au
DSD - Smart State Policy and Planning	David	Stubbins	3237 9787	david.stubbins@sd.qld.gov.au
FNQROC	Darlene	Irvine	4044 3038	d.irvine@ Cairns.qld.gov.au

ATTACHMENT 2: NEWSLETTER

SUSTAINABLE
TOURISM



Services

DRIVE TOURISM PROGRAM – STAGE TWO

Pacific Coast Touring Route

INTRODUCTION

Sustainable Tourism Services (STS) has been commissioned by Tourism Queensland to prepare a Situation Analysis for the second stage of the Drive Tourism Program.

Stage Two (DTP2) aims to develop a further five identified routes for the touring drive market. The five routes include the Great Inland Way, Leichhardt Highway, Country Way, Pacific Coast Touring Route and Capricorn Highway.

The purpose of the Drive Tourism Program is to move each of the routes into their next stage of development increasing the tourism benefits to those towns along each drive. DTP2 aims to work with key stakeholders to identify the potential of each route, develop a list of priorities, implement some of those priorities that may be outside the current scope and provide a catalyst for increased visitation to the State by the touring drive market.

THE PROCESS

Outlined below is a draft schedule which provides a timeline and key steps for the project.

Key Steps	Community Consultation	Timeline
1. Mobilisation	- Identification of key stakeholders. - Preparation of a draft Corridor questionnaire.	September / October
2. Context Analysis / Where are we now?	- At this stage the project team will work with the key stakeholders to determine what initiatives have been undertaken to promote the Pacific Coast Touring Route. This will	October

Key Steps	Community Consultation	Timeline
	involve an examination of the target market for the route, the route's unique selling points, its current stage of development, market and development opportunities and current management and marketing arrangements. - A questionnaire will be sent out to assist in this regard.	
3. Corridor Audits / Consultation	- Project team will complete an audit of soft and hard infrastructure and document current and future visitor markets. - This information will be shared with key stakeholders for feedback and comment.	October
4. Workshops		November / December
5. Draft Report		December
6. Final Report		December / January

CALL FOR INDUSTRY FEEDBACK

We need your support in providing up to date information on the Pacific Coast Touring Route. If you have information / data / reports that would be helpful to our review, please let us know by emailing kirsty@crctourism.com.au, phone (07) 3211 4726, mail Level 11, 30 Makerston Street, Brisbane Q 4000 or fax (07) 3211 4734.

If you require any clarification on the above, please do not hesitate to contact either Kirsty Chessher or Stewart Moore on (07) 3211 4726.

We look forward to working with you on this exciting study.

ATTACHMENT 3: SURVEY

SUSTAINABLE
TOURISM



Services

DRIVE TOURISM PROGRAM – STAGE TWO

PACIFIC COAST TOURING ROUTE

INTRODUCTION

Sustainable Tourism Services (STS) has been commissioned by Tourism Queensland to prepare a Situation Analysis for the second stage of the Drive Tourism Program.

Stage Two (DTP2) aims to develop a further five routes for the touring drive market. The five routes include the Great Inland Way, Leichhardt Highway, Country Way, Pacific Coast Touring Route and Capricorn Highway.

The purpose of the Drive Tourism Program is to move each of the routes into their next stage of development increasing the tourism benefits to those towns along each drive. DTP2 aims to work with existing key stakeholders to identify the potential of each route, develop a list of priorities, help implement some of those priorities that may be outside the current scope of the existing Committees and provide a catalyst for increased visitation to the State by the touring drive market.

PURPOSE OF THIS QUESTIONNAIRE

The purpose of this questionnaire is to assist the Project Team to develop a better understanding of each route's features and characteristics. It will also assist us to understand current and future consumer markets and to determine what differentiates each corridor from its competitors.

It would be greatly appreciated if the completed questionnaire could be returned to us by **29th October 2004**, via email, fax or post.

1. DRIVE MARKETS

Research undertaken by Tourism Queensland indicates that visitors on the Pacific Coast Touring Route have the following attributes:

- The **majority of travellers using the Pacific Coast Touring Route were from within Australia** (79%), with 31% from Queensland, 19% from New South Wales and 15% from Victoria.
- The majority travelling on the route were on **holidays or visiting friends and relatives** (88%).
- More than two-thirds were travelling in their **own car or 4WD** (70%).
- The majority of Pacific Coast Touring Route travellers described their overall trip as **“touring around”** (64%) rather than “driving straight to a main destination and back”.
- Just over half of those using the Pacific Coast Touring Route **stayed overnight at 11 or more locations** during their overall trip (51%).
- The age profile of travellers using the Pacific Coast Touring Route is slightly younger than travellers using other Queensland routes with **53% aged less than 55 years**.
- The **main sources of information** for travellers using the Pacific Coast Touring Route were: maps, motoring organisation brochures, previous knowledge or experience of travel in Queensland, recommendation from family or friends who have travelled in Queensland before, and caravan park association/club brochures.
- The Pacific Coast Touring Route had the lowest proportion of travellers who **obtained information from a Queensland Visitor Information Centre whilst on their trip (53%)**.
- Around **60% of those using the Pacific Coast Touring Route planned some of their trip** (i.e. route taken and towns visited) **before leaving home**. Around one quarter had made no firm route plans before leaving home (23%).
- Any pre-trip planning that was undertaken was **quite flexible while en-route**, with 39% of Pacific Coast Touring Route travellers making **unplanned overnight stops** during their trip.
- Just over half of Pacific Coast Touring Route travellers were **spending 1 month or more away from home on their trip** (58%).
- Just over half of travellers using the Pacific Coast Touring Route had **toured around Queensland by motor vehicle previously in the last three years** (58%).
- The Pacific Coast Touring Route had a lower proportion travelling as part of an **adult couple** (62%) and a higher proportion travelling as a **family group** (24%).
- Pacific Coast Touring Route travellers showed a **slightly younger profile**, with:
 - 53% describing their **household** as either a family with children still at home, a couple with no children or a young single living alone/in shared accommodation (vs 46% later families with no children at home or single older persons); and
 - 51% **working either full- or part-time** (vs 34% retired).

a) How consistent is this information with your knowledge of the visitor markets on this Corridor? Please identify any points of difference.

b) What are the main drive markets which currently use this corridor e.g. family groups, tour groups, older travellers, commercial travellers, etc. Please list in order of total size (1 being the main weakness).

- 1.
- 2.
- 3.
- 4.

c) Have these drive markets changed over the last three years?

d) If yes, what are the main reasons for this change? How have the different drive markets been affected?

e) Where are drive markets on the Pacific Coast Way currently travelling to? E.g. what is their end destination?

f) Where are drive markets travelling from? E.g. what is their origin?

2. ROUTE STRENGTHS AND WEAKNESSES

a) What do you believe are the main strengths of this route in meeting the needs of drive markets? Please list in order of priority (1 being the most important).

- 1.
- 2.
- 3.
- 4.
- 5.

b) What do you believe are the main weaknesses of this route in meeting the needs of drive markets? (1 being the most important)

- 1.
- 2.
- 3.
- 4.
- 5.

c) What opportunities exist to better promote travel along this corridor?

d) What threats exist which may limit the route's ability to meet the needs of drive markets in the future?

3. ROAD CONDITIONS/QUALITY

According to Main Roads data, key features of the Pacific Coast Touring Route road network are as follows:

- **Dual sealed carriageway (4 lanes +) from Coolangatta to just north of Nambour. From this point on to Cairns the route is mainly a single sealed**

carriageway (2 lanes), although dual carriageways (4 lanes +) exist around major centres (i.e. Rockhampton, Mackay, Townsville and Cairns).

- From **Coolangatta to Gympie** the **road surface** is mostly **cement or asphaltic concrete** (with small sections of bitumen). From **Gympie to Cairns** the **road surface** is mainly **bitumen**, although small sections of the corridor (mostly around major centres such as Rockhampton, Mackay, Townsville and Cairns) are asphaltic concrete.
- **Seal width** of the **dual carriageway roads** from **Coolangatta to just north of Nambour** are **greater than 11.6m**.
- From **just north of Nambour to Rockhampton** **seal width** ranges from **7.01m to greater than 9.1m**, although small sections north from Maryborough are narrow (between 6.41m and 7.0m).
- **Seal width** between **Rockhampton and Townsville** ranges from **6.41m to greater than 9.1m**.
- Between **Townsville and Cairns** **seal width** ranges from **5.81m to greater than 9.1m**.
- No data exists on the percentage of heavy vehicles using the route between Coolangatta and Gympie.
- From **Gympie to Rockhampton**, the percentage of **heavy vehicles** using the corridor ranges between **10% and 25%**.
- From **Rockhampton to Townsville** the percentage of **heavy vehicles** using the corridor ranges between **5% and 30%**.
- From **Townsville to Cairns** the percentage of **heavy vehicles** using the corridor ranges from less than **5% to 20%**.

a) Are you aware of any issues related to road condition which have been brought to your attention by visitors?

4. MARKETING

a) What current marketing collateral exists to promote the route? (e.g. maps, brochures, website etc.)

b) What future plans do you have for marketing collateral and marketing activity for the Pacific Coast Touring Route over the next two years?

c) In your opinion what action needs to be undertaken to attract a greater share of the Queensland Drive Market along this corridor?

d) Are the products or experiences offered by this route, sufficient to sustain future visitor growth?

5. ATTRACTIONS/SERVICES/EXPERIENCES

Tourism Queensland have identified the following route features and unique selling points:

- The Pacific Coast Touring Route passes through 11 of Queensland’s 14 tourism regions and traverses the heavily populated east coast of the State, meaning that there are countless things for visitors to do and see on their travels.
- The Bruce Highway, which forms a major part of the route, is generally regarded as a safer option for long-haul travel in Queensland with above-average road quality.

a) In your opinion, what are the main attractions attractions/unique selling features/experiences of the corridor? Please list them in order of significance (1 being the most significant).

- 1.
- 2.
- 3.
- 4.

5.

b) What gaps exist in products, services or experiences along the route? Please list.

6. COMPETITIVE ADVANTAGE

a) In your opinion, what are the special features which differentiate this route from other drive corridors? In other words what is the competitive advantage of this corridor?

7. OTHER ISSUES

a) Are there any additional issues you would like to raise?

Once completed, could you please return this survey to Sustainable Tourism Services via:

Facsimile: (07) 3211 4734
Email: kirsty@crctourism.com.au
Post: Sustainable Tourism Services
Level 11, 30 Makerston Street
BRISBANE, Qld 4000

Thank you very much for your assistance.

CONTACT DETAILS

Name:

Organisation:

Phone Number:

Email Address:

ATTACHMENT 4: RESEARCH

PACIFIC COAST TOURING ROUTE

Route Background

- ◆ The Pacific Coast Touring Route / Bruce Highway extends over 1,800km along the east coast in Queensland, from Coolangatta to Cairns (via Brisbane, Gympie, Rockhampton, Mackay and Townsville).
- ◆ The route passes through eleven (11) Regional Tourist Organisation regions in Queensland: Gold Coast, Brisbane, Sunshine Coast, Fraser Coast South Burnett, Bundaberg, Gladstone, Capricorn, Mackay, the Whitsundays, Townsville and Tropical North Queensland.
- ◆ The route passes through eight (8) Queensland Department of Main Roads Districts: South Coast Hinterland, Metropolitan, North Coast Hinterland, Wide Bay, Central, Mackay, Northern and Peninsula.
- ◆ The route passes through 32 Local Government Areas in Queensland: Gold Coast City, Logan City, Brisbane City, Pine Rivers Shire, Caboolture Shire, Caloundra City, Maroochy Shire, Noosa Shire, Cooloola Shire, Tiaro Shire, Woocoo Shire, Maryborough City, Hervey Bay City, Isis Shire, Kolan Shire, Miram Vale Shire, Calliope Shire, Fitzroy Shire, Rockhampton City, Livingstone Shire, Broadsound Shire, Sarina Shire, Mackay City, Whitsunday Shire, Bowen Shire, Burdekin Shire, Townsville City, Thuringowa City, Hinchinbrook Shire, Cardwell Shire, Johnstone Shire and Cairns City.
- ◆ There are 21 accredited Visitor Information Centres located either directly on the route or in major towns/cities situated alongside the route: Coolangatta, Surfers Paradise, Caboolture, Kybong, Tiaro, Maryborough, Childers, Miriam Vale, Rockhampton, Sarina, Mackay, Proserpine, Bowen, Ayr, Townsville, Ingham, Tully, Mission Beach, Innisfail, Babinda and Cairns.

Estimated Visitor Numbers

The following estimates are based on Department of Main Roads Annual Average Daily Traffic Counts and assumes 1.7 occupants per vehicle:

- ◆ There are at least 19 million long-haul light vehicles on the route from the **New South Wales border to Brisbane** per annum, carrying an estimated 33 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 1.7%, resulting in a minimum of approximately 560,000 visitors in 2003.
- ◆ There are at least 2.4 million long-haul light vehicles on the route from **Brisbane to Maryborough** per annum, carrying an estimated 4.1 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 2.4%, resulting in a minimum of approximately 97,000 visitors in 2003.
- ◆ There are at least 990,000 long-haul light vehicles on the route from **Maryborough to Rockhampton** per annum, carrying an estimated 1.7 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 53.5%, resulting in a minimum of approximately 900,000 visitors in 2003.

- ◆ There are at least 718,000 long-haul light vehicles on the route from **Rockhampton to Townsville** per annum, carrying an estimated 1.2 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 47.3%, resulting in a minimum of approximately 578,000 visitors in 2003.
- ◆ There are at least 885,000 long-haul light vehicles on the route from **Townsville to Cairns** per annum, carrying an estimated 1.5 million people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 16.2%, resulting in a minimum of approximately 244,000 visitors in 2003.

Visitor Attributes

Tourism Queensland has commissioned a number of studies looking at the long-haul drive market in Queensland, including the Queensland Road Travellers Survey (2002) and the Central Queensland Road Travellers Study (2002). The following table provides a breakdown of the sample of travellers using each of the strategic routes in both studies.

Route Name	Queensland Study	Central Qld Study
Pacific Coast	1884 (77%)	605 (86%)
Matilda Highway	516 (21%)	-
Capricorn Highway	243 (10%)	220 (31%)
Warrego Highway	367 (15%)	-
Leichhardt Highway	206 (8%)	40 (6%)
Savannah Way	272 (11%)	-
Overlander's Way	341 (14%)	-
Great Inland Way	390 (16%)	108 (15%)
Country Way	389 (16%)	75 (11%)

Findings from these studies relating to respondents who travelled along all or some of the route include:

- ◆ The majority travelling on the route were on **holidays or visiting friends and relatives** (88%+ both studies).
- ◆ More than two-thirds were travelling in their **own car or 4WD** (70%+ both studies).
- ◆ The proportion **towing a caravan** was higher in the Queensland study (44%) than in the Central Queensland study (19%), although Big 4 caravan parks were used to source respondents in the Queensland study. Interestingly, in both studies, the proportion towing a caravan on the Pacific Coast Touring Route was low relative to the other routes.
- ◆ The majority of Pacific Coast Touring Route travellers described their overall trip as **“touring around”** (64%) rather than “driving straight to a main destination and back”, similarly to those using the Country Way (66%). A higher proportion of those using the Matilda Way (85%), Great Inland Way (85%), Overlander's Way (84%), Capricorn Highway (75%) and Leichhardt Highway (71%) described their trip in this way.
- ◆ Just over half of those using the Pacific Coast Touring Route and the Country Way **stayed overnight at 11 or more locations** during their overall trip (51% each). By comparison, the proportion staying overnight at 11 or more locations was 81% for those travelling on the Matilda Highway and 75% for those travelling on the Great Inland Way.

- ◆ The age profile of travellers using the Pacific Coast Touring Route is slightly younger than travellers using other Queensland routes with **53% aged less than 55 years**. The Overlander's Way had a similar proportion of travellers in this age segment (54%).
- ◆ Similarly to travellers using other routes in Queensland, the **main sources of information** for travellers using the Pacific Coast Touring Route were: maps, motoring organisation brochures, previous knowledge or experience of travel in Queensland, recommendation from family or friends who have travelled in Queensland before, and caravan park association/club brochures.
- ◆ Compared to the other strategic routes, the Pacific Coast Touring Route had the lowest proportion of travellers who **obtained information from a Queensland Visitor Information Centre whilst on their trip (53%)**.

- ◆ According to the Queensland study, around **60% of those using the Pacific Coast Touring Route planned some of their trip** (i.e. route taken and towns visited) **before leaving home**. Interestingly, around one quarter had made no firm route plans before leaving home (23%). Overall, the extent of route planning for users of the Pacific Coast Touring Route was similar to users of the other touring routes.
- ◆ Any pre-trip planning that was undertaken was **quite flexible while en-route**, with 39% of Pacific Coast Touring Route travellers making **unplanned overnight stops** during their trip. A similar proportion of those using the Country Way also made unplanned overnight stops (38%). In contrast, visitors on other corridors were more flexible with around 60% of travellers using the Overlander’s Way, Savannah Way, and Matilda Highway indicating that they had made an unplanned overnight stop.
- ◆ Just over half of Pacific Coast Touring Route travellers were **spending 1 month or more away from home on their trip** (58%). However, while similar to users of the Country Way (55%), the proportion spending 1 month or more away from home was much higher for travellers using the Savannah Way (89%), the Overlander’s Way (83%), the Matilda Highway (83%) and the Great Inland Way (79%).
- ◆ Just over half of travellers using the Pacific Coast Touring Route had **toured around Queensland by motor vehicle previously in the last three years** (58%). This was similar to the profile of those using other significant north-south corridors in Queensland, namely the Matilda Highway and the Great Inland Way (56% each).
- ◆ Compared to the other Queensland routes, the Pacific Coast Touring Route had a lower proportion travelling as part of an **adult couple** (62%) and a higher proportion travelling as a **family group** (24%). This profile was similar to those using the Country Way (65% adult couples and 22% families).
- ◆ In terms of work status and household type, Pacific Coast Touring Route travellers tend towards a **slightly younger profile**, with:
 - 53% describing their **household** as either a family with children still at home, a couple with no children or a young single living alone/in shared accommodation (vs 46% later families with no children at home or single older persons); and
 - 51% **working either full- or part-time** (vs 34% retired).
- ◆ The **majority of travellers using the Pacific Coast Touring Route were from within Australia** (79%), with 31% from Queensland, 19% from New South Wales and 15% from Victoria. The Pacific Coast Touring Route had the second highest proportion of visitors originating from within Queensland (31%), behind the Warrego and Capricorn Highways (33% each).
- ◆ According to the Central Queensland study, the main reason respondents cited for travelling on the Pacific Coast Touring Route was **“I need to travel on it to get where I am going”** (70%). Compared to travellers using the Capricorn Highway, Leichhardt Highway, Country Way or Great Inland Way, however, a higher proportion of travellers using the Pacific Coast Touring Route cited the following reasons for choosing the route: “quicker than other highways” (23%), “more convenient” (19%), “visiting a tourist attraction en route” (11%), “habit/always use the highway (4%), and “better quality road” (3%).
- ◆ The top three reasons cited as **barriers to travel to Queensland in the future by adult couples** using the Pacific Coast Touring Route included: “unacceptable condition of roads/highways” (31%), “fuel prices” (10%) and “trucks/heavy vehicles/traffic/road works” (5%). For **families** using the Pacific Coast Touring

Route, the top three reasons were: “unacceptable conditions of roads/highways” (21%), “distance” (15%) and “fuel prices” (12%).

- ◆ The proportion of travellers using the Pacific Coast Touring Route who said they would ‘definitely’, ‘probably’ or ‘possibly’ **return to Queensland on a motoring holiday in the next three years (82%)** was similar to those using the Warrego Highway (84%) and the Capricorn Highway (82%).

Route Awareness

The awareness of Queensland’s themed routes was recently investigated in the Regional Route Travellers Study (2004). Although the ‘Pacific Coast Touring Route’ was not tested, the more commonly used name for the route, i.e. **‘Bruce Highway’**, **scored highest in terms of awareness** amongst road travellers in Queensland (87%). Encouraging travellers to adopt and/or recognise an alternative name may pose a challenge for route development.

The following table lists the awareness levels for each of the routes tested in the study.

Route Name	Awareness
Bruce Highway	87%
Matilda Highway	74%
Capricorn Highway	73%
Warrego Highway	62%
Leichhardt Highway	60%
Savannah Way	56%
Overlander’s Way	49%
Great Inland Way	38%
Country Way	13%

Route Committee & Route Planning

No route committee exists but there is a marketing group based in New South Wales (known simply as ‘Pacific Coast Touring Route’). The activities of this group are, however, focused on promoting the New South Wales section of the route.

To our knowledge, there has been no route planning for the Pacific Coast Touring Route conducted by this or any other group.

Current Collateral

- ◆ In the past, to our knowledge, two brochures have been produced promoting the Pacific Coast Touring Route – one for the Sydney to Brisbane section and one for the whole route (i.e. Sydney to Cairns).
- ◆ There is also a website promoting the Sydney to Brisbane section which accompanies the Pacific Coast Touring Route brochure (www.pacificcoast.com.au).
- ◆ A company called Action Graphics produce the Travel Action Bruce Highway and Byways brochure, promoting many of the towns along the route.

Route Features & Unique Selling Points

- ◆ The Pacific Coast Touring Route passes through 11 of Queensland's 14 tourism regions and traverses the heavily populated east coast of the State, meaning that there are countless things for visitors to do and see on their travels.
- ◆ The Bruce Highway, which forms a major part of the route, is generally regarded as a safer option for long-haul travel in Queensland with above-average road quality.

Road Quality

According to Department of Main Roads data, features of the majority of the road network that forms the Pacific Coast Touring Route are as follows:

- ◆ **Dual sealed carriageway (4 lanes +) from Coolangatta to just north of Nambour. From this point on to Cairns** the route is mainly a **single sealed carriageway (2 lanes)**, although dual carriageways (4 lanes +) exist around major centres (i.e. Rockhampton, Mackay, Townsville and Cairns).
- ◆ From **Coolangatta to Gympie** the **road surface** is mostly **cement or asphaltic concrete** (with small sections of bitumen). From **Gympie to Cairns** the **road surface** is mainly **bitumen**, although small sections of the corridor (mostly around major centres such as Rockhampton, Mackay, Townsville and Cairns) are asphaltic concrete.
- ◆ **Seal width** of the **dual carriageway roads from Coolangatta to just north of Nambour are greater than 11.6m.**
- ◆ From **just north of Nambour to Rockhampton seal width** ranges from **7.01m to greater than 9.1m**, although small sections north from Maryborough are narrow (between 6.41m and 7.0m).
- ◆ **Seal width** between **Rockhampton and Townsville** ranges from **6.41m to greater than 9.1m.**
- ◆ Between **Townsville and Cairns seal width** ranges from **5.81m to greater than 9.1m.**
- ◆ No data exists on the percentage of heavy vehicles using the route between Coolangatta and Gympie.
- ◆ From **Gympie to Rockhampton**, the percentage of **heavy vehicles** using the corridor ranges between **10% and 25%.**
- ◆ From **Rockhampton to Townsville** the percentage of **heavy vehicles** using the corridor ranges between **5% and 30%.**
- ◆ From **Townsville to Cairns** the percentage of **heavy vehicles** using the corridor ranges from less than **5% to 20%.**

Tourism Development Along Route

Awaiting comments from Destination Developers.

Potential Issues/Threats

- ◆ As there is currently no group/committee responsible for the whole route and as some sections of the route are more developed than others, the route will need to be split into segments to assess its current performance and potential. Suggested segments are:
 - Brisbane to Rockhampton;
 - Rockhampton to Townsville; and
 - Townsville to Cairns (the Great Green Way).

