

Prepared for:
Tourism Queensland

Drive Tourism Program – Stage 2

The Leichhardt Highway

SITUATION ANALYSIS REPORT

**SUSTAINABLE
TOURISM**



Services

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CONTENTS

1. EXECUTIVE SUMMARY	1
Business Planning	5
Product Development	5
Marketing	6
Monitoring Market Activity and Needs	8
2. BACKGROUND	9
2.1 TERMS OF REFERENCE	9
2.2 CORRIDOR ORIGIN	9
2.3 DELIVERABLES AND OUTCOMES	9
2.4 APPROACH	9
3. CORRIDOR SCALE/STRUCTURE	10
3.1 ROAD NETWORK	10
3.2 DISTANCE	15
3.3 LINKAGES	15
4. CORRIDOR MANAGEMENT	16
4.1 LEICHHARDT HIGHWAY 39 PROMOTIONS ASSOCIATION INC.	16
4.1.1 The Organisation	16
4.1.2 Committee Activities	16
4.2 KEY STAKEHOLDERS	17
4.2.1 Regional Tourism Organisations	17
4.2.2 Main Roads Organisational Structure	19
4.3 MANAGEMENT OF ROAD CORRIDORS	19
4.3.1 Roadside Advertising Policy	19
4.3.2 Provision of Roadside Amenities	19
4.3.3 Road Direction Signage Policy	20
4.3.4 Visitor Information Network	21
4.3.5 District Tourism Signage Committees	21
5.0 DEMAND PROFILE	23
5.1 QUEENSLAND DRIVE MARKET RESEARCH – AN OVERVIEW	23
5.1.1 Drive Tourism and Touring Market Review	23
5.1.2 Drive Market Summary	24
5.1.3 Queensland Road Travellers Survey	27
5.1.4 Road Travellers Study	27
5.2 DEPARTMENT OF MAIN ROADS RESEARCH	28
5.3 THE ROAD TRAVEL EXPERIENCE	28
5.4 2003 DRIVE TOURISM MARKET REVIEW	32
5.5 DRIVE ROUTE TYPOLOGY	33
5.6 TOURISM QUEENSLAND RESEARCH - LEICHHARDT HIGHWAY	34
5.6 Route Awareness	35
6.0 DRIVE MARKET RESEARCH – WHAT DOES IT TELL US ABOUT THE LEICHHARDT HIGHWAY?	37
6.1 WHAT ARE THE IMPLICATIONS FOR THE LEICHHARDT HIGHWAY?	38
7.0 PRODUCT AUDIT	39
7.1 MAN-MADE PRODUCTS/ATTRACTIONS	39
7.2 NATURAL PRODUCTS/ATTRACTIONS	41
7.3 ICONIC ATTRACTIONS/EXPERIENCES	42
7.4 COMPETITIVE ADVANTAGE	43
7.5 THEMATIC LINKAGES	43

8.0 HARD INFRASTRUCTURE AUDIT	45
8.1 MAIN ROADS ORGANISATIONAL STRUCTURE	45
8.2 ROAD CONDITION	45
8.3 PLANNED UPGRADES	46
8.4 MAIN ROADS SERVICE INFRASTRUCTURE (E.G. REST AREAS)	50
9.0 MARKETING PLANS	51
9.1 TOURISM CONSIDERATIONS	51
9.2 SWOT ANALYSIS	51
9.3 MARKET POSITIONING	53
9.4 COLLATERAL	54
10.0 DRAFT ACTIONS AND RECOMMENDATIONS	55
10.1 VISION	55
10.2 MISSION/PURPOSE	55
10.3 POSITIONING	55
10.4 TARGET MARKETS	56
10.5 PROPOSED ACTIONS	56
10.5.1 Business Planning	56
10.5.2 Product Development	57
10.5.3 Marketing	58
10.5.4 Monitoring Market Activity and Needs	59
10.6 IMPLEMENTATION PRIORITIES	59
ATTACHMENTS	61
ATTACHMENT 1: STAKEHOLDER LIST	62
ATTACHMENT 2: ROUTE STEERING COMMITTEE BRIEF QUESTIONNAIRE	63
ATTACHMENT 3: STAKEHOLDER QUESTIONNAIRE	66
ATTACHMENT 4: MAP OF ROAD SIDE REST AREAS	72
ATTACHMENT 5: ROAD SIGNAGE BROCHURE	73
ATTACHMENT 6: HOW DO WE COMPARE?	76

Tables

Table 1	The Tourism Queensland Road Network	11
Table 2	Distances between towns and cities along the Leichhardt Highway	15
Table 3	Summary of Highway Stakeholder Groups.....	17
Table 4	Main Roads Regions and Districts.....	19
Table 5	Comparison of States/Territories as Drive Destinations	23
Table 6	Summary of DMP's and Drive Tourism Elements.....	30
Table 7	Drive Route Typology	33
Table 8	Summary of Highway Awareness Levels	36
Table 9	Drive Market Research Summary.....	38
Table 10	Main Roads Regions and Districts.....	45
Table 11	Highway Sections Subject to Flooding	46
Table 12	DMR Roads Implementation Program 2003-04 to 2007-08.....	47
Table 13	Designated motorist rest areas on the Leichhardt Highway	50
Table 14	Leichhardt Highway Tourism Route SWOT	51

Figures

Figure 1	Map of Drive Tourism Routes	12
Figure 2	Future Route Marking Changes	13
Figure 3	The Leichhardt Highway Drive Route	14
Figure 4	Map of Routes and Regional Tourism Organisations	18
Figure 5	Seasonality of Touring Visitors to Queensland.....	25
Figure 6	Information Sources Used by Touring Visitors to Queensland	26
Figure 7	Activities of Touring Visitors to Queensland	26
Figure 8	The Holiday Decision Making Process	32
Figure 9	Queensland Bioregions	42
Figure 10	Leichhardt's 1844 Journey	43
Figure 11	Indicative lifecycle positioning of the Leichhardt Highway	53

1. EXECUTIVE SUMMARY

Background

The Drive Tourism Program Stage 2 includes five new routes for development for the touring drive market, one of which is the Leichhardt 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. This stage of the program, the situation analysis identifies the status of the Highway, the vision and positioning of the corridor, and actions required to achieve the vision.

The situation analysis involved collation of available research and publications, consultations with stakeholders, a workshop convened to develop a draft action plan to help guide the work of the highway Committee, and production of the situation analysis report.

Corridor Scale/Structure

The Leichhardt Highway is one of several state or national routes connecting Queensland with New South Wales, and Victoria. Currently it is badged as Highway 39, but will be re-badged as the A5 early in 2005. The route is intercepted by one east-west corridor Warrego Highway (Miles) and terminates at the Capricorn Highway (near Westwood). For marketing purposes, the Committee includes the route from Westwood to Yeppoon (and the alternate route from Dululu through Mount Morgan) as part of the Leichhardt Highway. Key decision points and intersections include Goondiwindi, The Murri Murri intersection (18km north of Goondiwindi), Moonie, The Guns, Miles, Banana, Dululu, Rockhampton, and Yeppoon.

Corridor Management

The Leichhardt Highway 39 Promotions Association Inc. was formed on 15th November 1991. At present, the main focus of activities is on production and distribution of the highway brochure, in particular to caravan and camping markets, with direct trade and consumer show representation in Melbourne and Adelaide, and indirect representation in Sydney and Brisbane.

Physical development and maintenance of the highway is undertaken by three district offices of the Queensland Department of Main Roads (DMR). DMR also manage the roadside advertising policy, and roadside amenities (some in conjunction with local government authorities).

Visitor Information Centres along the route play an important role in the provision of information to visitors travelling on the highway (and in advance of their travel in some cases).

Demand Profile

Most traffic is focussed along the southern section (Goondiwindi-Miles) - 163,000, with 50,000 along the northern section (Miles-Rockhampton/Capricorn Coast)

The main markets are older travellers, family groups, and some tour groups.

Compared to all domestic visitors to Queensland, the drive market tends to travel outside of the main holiday periods, use more information from sources such as the internet and motoring clubs, and are more likely than the average visitor to Queensland

to participate in a number of activities, particularly nature-based activities and visiting historical places.

Drive Market Research

The Leichhardt Highway has:

- The largest proportion of visitors travelling with caravans of all nine routes
- Travellers who make less stops per trip
- A high proportion of visitors who are destination focussed (“I need to travel on it to get to where I am going”)
- Have travellers who prefer the route because it is quieter
- A reasonably high level of awareness (79%)
- The highest proportion of travellers who had toured around QLD by motor vehicle previously in the last three years (78%).
- The highest proportion of visitors originating from Victoria (32%)
- Many national parks in close proximity (some undeveloped, with limited access).
- An alternative route to Central Queensland - Country Way and Pacific Highway are either complementary or competitive routes

The research shows that:

- Caravan / camping / motorhomes and four wheel drives are the key markets for the Leichhardt Highway e.g. there is a level of fit between these markets and the products / experiences offered by Leichhardt Highway.
- Visitor Information Centres are important in providing information to travellers on the Leichhardt Highway.
- Few travellers appear to drive both up and back on the Leichhardt Highway route
- Main information services include maps, motoring organisations, and VICs en-route.
- The Leichhardt Highway must link with the marketing plans of RTOs.

Product Audit

There are a variety of man made attractions and events and natural attractions generally accessible to visitors from the Leichhardt Highway, forming part of the potential experiences during the trip.

Route features and unique selling points include:

- Towns along the route boast several historical/ heritage sites and a small section of the route was traversed by the explorer in 1844 after which the highway was named.
- A range of National Parks and scenic spots including Isla Gorge and Expedition National Parks.
- Potential visitors could be encouraged to use the Leichhardt Highway as an alternative route to the Central Queensland region, instead of the Bruce Highway/ Pacific Coast Way. There is also the opportunity to promote the Leichhardt Highway as an alternative ‘loop route’ in conjunction with the Country Way or Great Inland Way (i.e., up one route and back another).

Compared to the other Drive Tourism Stage Two routes, the Leichhardt Highway has the advantages of:

- An easy to drive route between southern states and Central Queensland (relatively, flat, straight and fast)
- A variety of National Parks
- A high level of existing awareness associated with Leichhardt and potential to build on this by theming the route in a distinctive way

Attractions and features that potentially could form part of a thematic linkage along the route include:

- The heritage of Leichhardt (and other explorers of the region) and individual towns along the route
- Fishing
- National Parks
- 4WD opportunities in relatively undeveloped areas

Hard Infrastructure Audit

According to Department of Main Roads data, features of the Leichhardt Highway road network are as follows:

- Single sealed carriageway (bitumen), two lanes.
- Seal width along the majority of the route ranges between 7.01m and 9.1m, although in some sections seal width ranges between 5.81m and 6.4m.
- The percentage of heavy vehicles using the route ranges between 20% and 30% for the Goondiwindi to Dululu section.

There are several rest areas designated for motorists (as distinct from areas designated for heavy vehicles). Note that there are no designated rest areas on the Leichhardt Highway for motorists between Miles and Wowan, as distance of approximately 350 km.

Tourism Marketing

There are several considerations for the highway from a tourism marketing standpoint:

- Co-promotion with the Newell Highway is key.
- The potential for promotion of loops with the Country Way and Great Inland Way
- The suitability of the route to the target market (and possible need for more paid potable, grey and black water points along the route for caravans and motorhomes)
- Visitor statistics are needed for the route / regions.
- Variable market readiness in terms of product (accommodations, VICs, attractions etc.)
- The Leichhardt Highway is 2.5 hours shorter (Sydney-Rockhampton) and 4 hours shorter (Melbourne-Rockhampton) than the Country Way and Pacific Highway
- Has the name of a famous explorer, which could be combined with the undeveloped nature of many National Parks and rustic nature of man made attractions, into an adventure-style theme and brand
- How to better engage with, and leverage the resources of the three RTOs involved.

Compared to the other Great Inland Way, Country Way and Capricorn Highway (see Attachment 6), the Leichhardt Hwy has:

- Higher awareness, more point-to-point, less touring
- A good national link to Melbourne
- Dubbo and Rocky/Capricorn Coast as destination foci
- Dispersed small towns / service hubs
- Modest attractions (mines, undeveloped National Parks) and more recognised Capricorn Coast)
- More caravan/campervan & 4WDers
- Similar organisational structure to some routes
- Similar product development challenges (no plans for any substantive new product or signage for the Leichhardt)
- Undertakes similar marketing activities

The Highway and Committee's main expenditure and marketing vehicle is the Leichhardt Highway brochure. The Committee has also developed a web page (<http://www.leichhardthighway.com>), which is linked to the Capricorn Tourism website, but no other websites as yet.

There is also good exposure of the highway in Tourism Queensland's Motoring Holiday Guide and Motoring Holiday Website, and also the Toowoomba & Golden West Regional Tourist Association's Western Downs Touring Guide.

Draft Actions and Recommendations

This section summarises the outcomes of the 6 December workshop with the Leichhardt Highway (39) Promotions Association Inc., Committee. The draft actions and recommendations have subsequently received the broad support of the Committee.

The proposed vision statement is:

To have achieved by the end of the three year Drive Tourism Program Stage 2, documented growth in new and existing target markets and an increase in visitor expenditure along the route, by enhancing the physical attributes of the highway, developing tourism product, putting in place a distinctive explorer's experience and/or theme, and implementation of a variety of coordinated and cooperative marketing initiatives.

A series of objectives were identified to guide activity towards the vision, in areas including promoting growth in new and existing markets, encouraging greater length of stay and spending, more effective distribution of promotional material, and development of tourism product and entrepreneurship.

In terms of positioning, the highway has both product and market strengths, which should be used to develop a strong and distinctive brand for the Leichhardt Highway which in turn should be used in various marketing and promotional media.

Specific brand benefits will need to be communicated to target audiences and will need to be closely linked to the strengths of the Leichhardt Highway. The challenge will be to present in one document or message, the utilitarian benefits associated with the highway as the 'straight line run to the Tropics' (and implied goal of more travellers) with the potential experiential benefits of using a Leichhardt theme to encourage visitors to explore the corridor and take the time to experience places along the route (and implied goals of increased length of stay and expenditure).

Primary, established target markets include Victorians (specifically, Melbournians) and Caravanners (subsets - new vanners, upper class, ragtag, etc.). Emerging and niche target markets include 4WD'ers, fishing enthusiasts (Bass to Bara trail, Dawson River), bird watchers and events.

A series of 37 proposed actions with accompanying organisational responsibility, were identified in the areas of business planning, product development, marketing, and the monitoring of market activity and needs

Business Planning

Action	Responsibility
1. Need product representation on committee (operators can do more than just pay to advertise in the brochure) since they are direct beneficiaries and providers of the visitor experience along the way. Start with one operator from each of the three RTO regions.	Leichhardt Highway (39) Promotions Association Inc., Committee (LHPAC)
2. Develop a short, simple 3 year business, marketing and financing plan that links with the Drive Tourism Program to maximise benefits to Highway stakeholders.	LHPAC, with involvement of RTOs, LTOs and TQ (Drive Tourism Program)
3. Strengthen links with the Newell Highway to link the Leichhardt with it's target markets.	Leichhardt Committee
4. Develop liaison & communication protocols and processes between the Committee and, LTOs, LGAs, RTOs, EDOs, ¹ etc., to minimise the potential for duplication and enable a logical sharing of tasks.	LHPAC, with involvement of RTOs, LTOs and TQ (Drive Tourism Program)

Product Development

Action	Responsibility
5. Packaging and selling local product – where local government promotes increased tourism (e.g., by means of 2-for-1 nights accommodation in caravan parks), ensure local businesses (cafes, newsagents, service stations, chemists, etc.) are invited to explore how they can link with such initiatives to expand their own markets and business. Beechworth Bakery is a good case study (it helps sell the region ²).	LHPAC, EDO's, LGAs, local progress associations and chambers of commerce, regional economic development groups.
6. Packaging/branding – develop a distinctive Leichhardt product, service, identity or signage (the example given at the workshop was the Leichhardt Pie - or wrapper) that could be	LHPAC, EDO's, local progress associations and chambers of commerce, regional economic development groups.

¹ LTOs – local tourism associations, RTOs – regional tourism associations, LGAs – local government associations, EDOs – economic development officers, TQ – Tourism Queensland, LHPAC – Leichhardt Highway Promotions Association committee, DMR – Department of Main Roads, VICs – visitor information centres, EPA - Environmental Protection Agency, QPWS – Queensland Parks and Wildlife Service.

² One of the reasons behind the success of the Beechworth Bakery in regional Victoria is that it networks and cross promotes with other businesses.

Action	Responsibility
applied or distributed along the Highway.	
7. Promote the development of new, or upgrading of existing coffee shops to meet the contemporary tastes and preferences of travellers (including those looking for a 'real coffee').	LHPAC, EDO's, local progress associations and chambers of commerce, regional economic development groups.
8. Identify and install more rest/pullover areas (influence of forward infrastructure plans)	LHPAC, LGAs and DMR.
9. Identify scope for building passing lanes on long stretches outside of towns.	LHPAC, LGAs and DMR.
10. Facilitate (by education and encouragement) the development of a service culture and tourism entrepreneurship - encourage relevant businesses to think like a tourism operator. ³	LHPAC, EDO's, LTOs, RTOs, local progress associations and chambers of commerce, regional economic development groups.
11. Develop a one page touring itinerary, map and attractions / features description for each town (distributed by VICs).	LHPAC, EDO's, LTOs, RTOs, LGAs.
12. Conduct an annual, comprehensive product audit of all tourism product – then identify what might be missing or needs improvement.	LHPAC, EDO's, LTOs, RTOs, LGAs.
13. Conduct an annual, comprehensive services audit (LPG, mobile coverage, RACQ stations, etc) and update the information in various highway media	LHPAC, EDO's, LTOs, RTOs, LGAs.
14. Work with EPA to determine whether some improvements to all, or a concerted focus on 1-2 undeveloped National Parks will result in achieving outcomes (better access and facilities) sooner	LHPAC, EDO's, RTOs, LGAs, EPA, QPWS.
15. Development of new, and enhancement of existing attractions.	LHPAC, EDO's, LTOs, RTOs, LGAs, local progress associations and chambers of commerce, regional economic development groups.
16. Conduct a product audit / potential assessment from the perspective of the 4WD enthusiasts market (on both public/private property).	LHPAC, RTOs, LTOs, TQ, 4WD clubs.

Marketing

Action	Responsibility
17. Develop the Leichhardt explorer's theme and brand (the Highway's raison d'etre?) and introduce this to all Leichhardt Highway promotional media and collateral.	LHPAC, RTOs, LTOs, TQ.
18. Monitor plans for the upcoming 2006 Year of the Outback and investigate opportunities to leverage marketing and events (along the lines of the recent, successful Ludwig Leichhardt	LHPAC, RTOs, LTOs, TQ.

³ Quotes From The Beechworth Bakery Staff Handbook – “Who runs the Bakery? – The Customers”. ‘If we don't take care of our customers someone else will”

Action	Responsibility
Expedition Exposition)	
19. Develop list/inventory of cooperative opportunities - resources are scarce, therefore, need to leverage with others as much as possible (working with the media and distribution channels of others)	LHPAC, RTOs, LTOs, TQ.
20. Explore how the highway can be represented and promoted consistently in all three RTO brochures / touring guides (using the Western Downs Touring Guide as a template).	LHPAC, RTOs, TQ.
21. Explore where efficiencies in representation at consumer shows can be achieved with one or all of the three RTOs.	LHPAC, RTOs, TQ.
22. Look for additional opportunities for promotion in the media and publicity in motoring publications.	LHPAC, RTOs, LTOs, TQ.
23. Intensify promotion of the Capricorn Coast at VICs between Goondiwindi and Miles to minimise leakage of touring traffic off the highway before Miles.	LHPAC, RTOs, LTOs.
24. Promote 'looping' opportunities among the highways at Goondiwindi and Rockhampton (since several routes pass through these cities, they are not in a position to favour anyone route), i.e., up one highway, back another.	LHPAC, RTOs, LTOs.
25. Suggest where visitors can stop along the way (for 2, 4, or 6 hourly rest stops or breaks, or overnight)	LHPAC, RTOs, LTOs.
26. Develop and install interpretive and/or story panels in VICs along the highway (interpretive materials should be located at attractions and VICs, rather than on highway signage).	LHPAC, RTOs, LTOs, TQ.
27. Theme VICs along the highway to the Leichhardt story.	LHPAC, LTOs, LGAs.
28. Regular liaison with DMR (all three offices) on the rollout of the re-badging of SR39 to the A5.	LHPAC, RTOs, LTOs, DMR.
29. Where possible (on websites, flyers, publicity, etc.) update product information (new and improved product) to ensure target markets are aware of new product as it becomes available (rather than every 2 years when the brochure is reprinted).	LHPAC, RTOs, LTOs.
30. Link all relevant websites – RTOs, Leichhardt Highway, Newell Highway, LGAs, LTOs, TQ/Qld Holidays, ATDW, RACQ, Motoring Holiday Guide, etc., websites to enable visitors to find highway-related information specific to a particular site.	LHPAC, RTOs, LTOs, TQ and other website operators.
31. Investigate the possible extension of the explorer's theme (or a theme endemic to the Newell) to the Newell Highway	LHPAC, RTOs, LTOs, Newell Highway Promotion Association.
32. Explore the potential of developing a short brochure (4-8 pages) to promote the route interstate and use as an insert to motoring magazines.	LHPAC, RTOs, LTOs, TQ
33. Develop the existing Leichhardt Highway website further and ensure it is linked to TQ's new	LHPAC, RTOs, LTOs, TQ

Action	Responsibility
motoring website	
34. Ensure all maps and brochures correctly identify the Leichhardt Highway	LHPAC, RTOs, LTOs,

Monitoring Market Activity and Needs

Action	Responsibility
35. Collect and analyse data on the volume and characteristics of visitor traffic on the highway (North-South and South-North travel, and by month)	LHPAC, LTOs, VICs, TQ, DMR.
36. Monitor the effectiveness of various initiatives (representation at shows has been consistent, but how well has it worked in delivering visitors?). Brief surveys at key decision points and destinations with periodic reports and feedback to the Committee.	LHPAC, LTOs, RTOs, TQ and operators.
37. Periodic surveying of target markets to monitor changes in what they want.	LHPAC, RTOs, LTOs, TQ and operators.

Implementation Priorities

1. Advertise corridor in key publications (Regional Tourism brochures, Newell Highway etc.).
2. Develop a short brochure to promote the route in new markets.
3. Develop an interpretation template and install interpretation panels in Queensland and New South Wales.
4. Develop web site linkages and PR stories to provide the benefits of the corridor.
5. Introduce road safety initiatives with Queensland Transport.
6. Align with State Road Strategy initiatives including alpha numeric signage, drive market research, and drive marketing programs developed by Tourism Queensland etc.

2. BACKGROUND

2.1 Terms of Reference

Following the successful completion of Stage One of the Drive Tourism Program, Tourism Queensland has 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.

2.2 Corridor Origin

Technically, the Leichhardt Highway, also badged as state route 39, extends from Goondiwindi in the south to its intersection with the Capricorn Highway (near Westwood) in the north. The Leichhardt Highway (39) Promotions Association Inc. (the Committee), established in November 1991, promotes the 700 km highway or drive route as extending from Goondiwindi in the south to Yeppoon in the north. The highway was named in 1937 after the explorer Ludwig Leichhardt.

2.3 Deliverables and Outcomes

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

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

2.4 Approach

The project was undertaken in several stages. the initial stage involved collection and collation of available research and publications, preparing and sending a brief to each route committee, preparation of a list of stakeholders, etc.

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

Individual surveys for each route were prepared and these have been emailed and mailed out to a wide range of stakeholders including Local Government Authorities, other 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. This was distributed to members of the highway committee. This material was used as background to a workshop convened to develop a draft action plan to help guide the work of the Committee in relation to Stage 2 of the Drive Tourism Program.

The final stage of the project was collation of material and feedback into the draft situation report.

3. CORRIDOR SCALE/STRUCTURE

3.1 Road Network

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 to consider for the Leichhardt Highway 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 Leichhardt Highway better link and trade off these road networks?
2. The multiple destination and key decision points (cross roads) which connect with the Leichhardt Highway. Many road travellers might initially travel along sections of the Leichhardt Highway but have the option of returning to their place of origin via a different road corridor (what are the key decision points for the Leichhardt Highway?)
3. Even though the road corridor is extensive in length our research indicates that few travellers travel its entire length. Most travellers 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 Leichhardt Highway through key tourism organisations etc.).

Table 1 outlines the Tourism Road Network in Queensland. A map of Australia identifying the road network is shown in Figure 1.

Much of the Leichhardt Highway will be rebadged as the A5 in early 2005 (Figure 2). This will bring about some level of brand identity and continuity in Queensland.

A map of the corridor showing the main towns and cities on the route is included as Figure 3.

Table 1 The Tourism Queensland 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 Longreach	Rockhampton (east) Barcaldine (west)	Barcaldine Emerald Dingo Rockhampton Longreach	Not applicable	- Great Inland Way - Matilda Highway - Leichhardt Highway

Figure 1 Map of Drive Tourism Routes

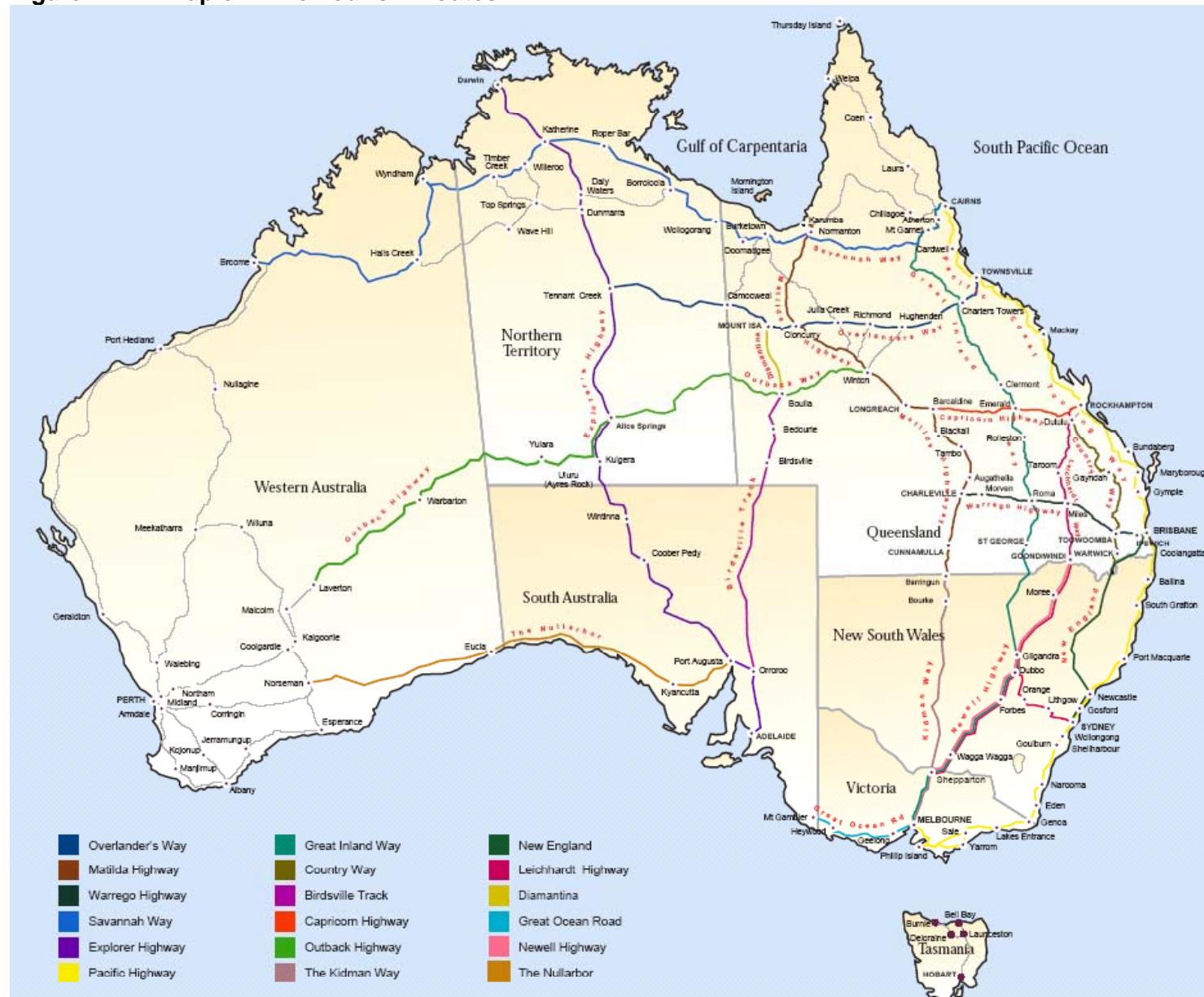


Figure 2 Future Route Marking Changes

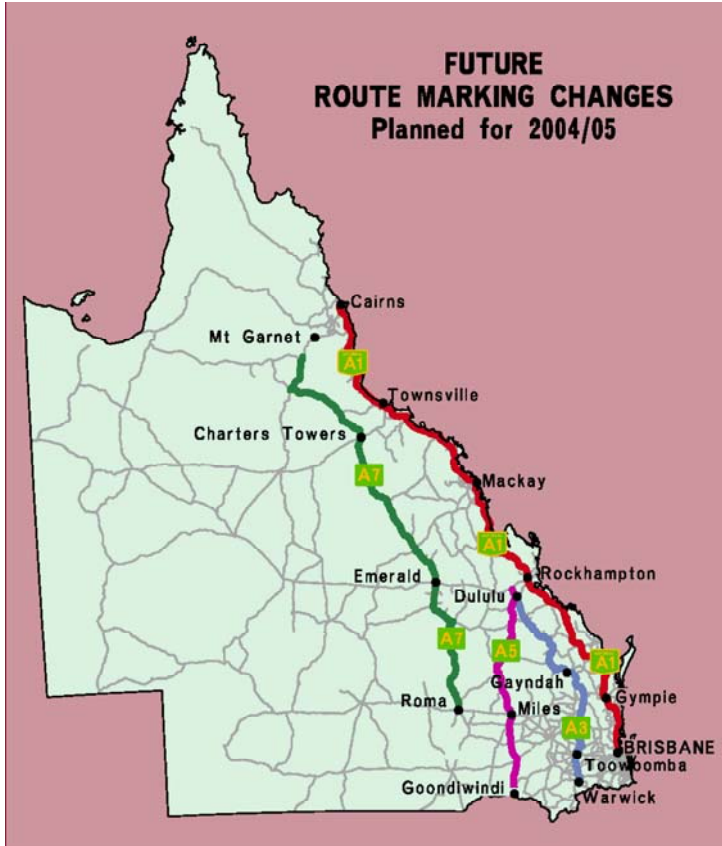
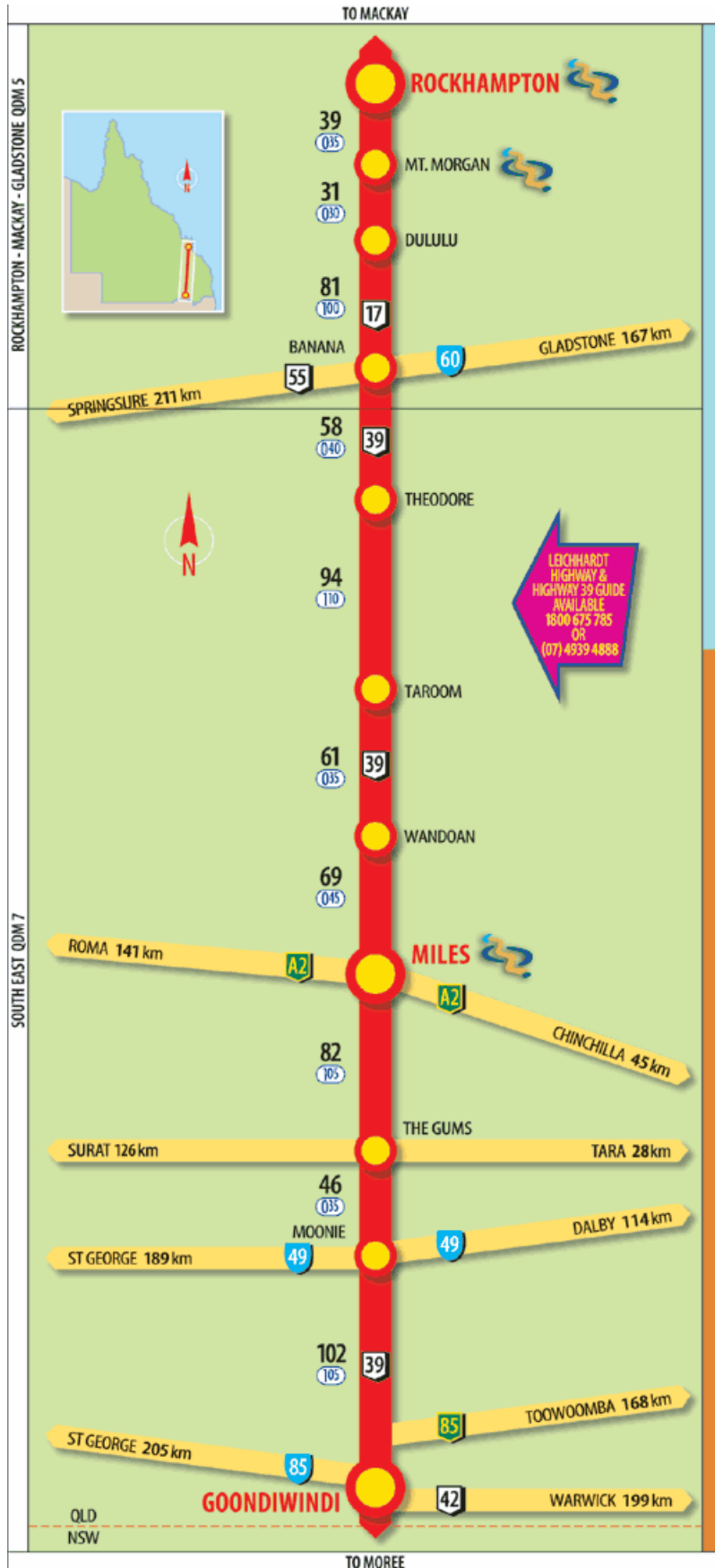


Figure 3 The Leichhardt Highway Drive Route



Soon to be rebadged as A5

3.2 Distance

The distance between towns and cities along the route are shown below.

Table 2 Distances between towns and cities along the Leichhardt Highway

Origin	Destination	Kilometres
Goondiwindi	Moonie	94
Moonie	The Gums	45
The Gums	Condamine	47
Condamine	Miles	33
Miles	Wandoan	66
Wandoan	Taroom	59
Taroom	Theodore	95
Theodore	Banana	59
Banana	Rannes	45
Rannes	Wowan	23
Wowan	Dululu	10
Dululu	Rockhampton	70
Rockhampton	Yeppoon	48
TOTAL		694

3.3 Linkages

The route is intercepted by one east-west corridor Warrego Highway (Miles) and terminates at the Capricorn Highway (near Westwood). For marketing purposes, the Committee includes the route from Westwood to Yeppoon (and the alternate route from Dululu through Mount Morgan) as part of the Leichhardt Highway.

Key decision points and intersections include:

- Goondiwindi
- The Murri Murri intersection (18km north of Goondiwindi)
- Moonie
- The Guns
- Miles
- Banana
- Dululu
- Rockhampton
- Yeppoon

4. CORRIDOR MANAGEMENT

4.1 Leichhardt Highway 39 Promotions Association Inc.

4.1.1 The Organisation

The Leichhardt Highway 39 Promotions Association Inc. was formed on 15th November 1991. Membership of the committee since inception has included nine local government authorities (not all have been members consistently since 1991):

- Banana Shire
- Goondiwindi Town
- Livingstone Shire
- Mount Morgan Shire
- Murilla Shire
- Rockhampton City
- Tara Shire
- Taroom Shire
- Waggamba Shire

Three regional tourism organisations are currently represented:

- Capricorn Tourism
- Toowoomba & Golden West Regional Tourist Association
- Gladstone Area Promotion and Development Limited (since 2004 with the re-alignment of the region to include Banana Shire)

Until last year, a caravan park operator was also a member of the committee (the new owners have elected not to serve on the committee).

The Committee comprises a Chairman, Deputy Chairman, Secretary, Treasurer, and Secretariat. The group currently does not have any full-time staff and all committee members are voluntary. The Committee meets four times per year.

4.1.2 Committee Activities

There is no printed business plan, and the articles of association are not readily to hand. In recent years the Committee's marketing activities have consisted of:

- Billboards (trialled in the past, with none planned)
- Attendance at trade and consumer travel shows
- Production of a standalone brochure
- A dedicated website
- Famils or visits with VICs along the route
- Cross-promotions with adjoining highway committees
- Cooperative marketing with RTOs
- Periodic publicity in motoring association magazines
- Liaison with RTOs and LGAs
- Liaison with DMR

At present, the main focus of activities is on the caravan and camping markets, with direct trade and consumer show representation in Melbourne and Adelaide, and indirect representation in Sydney and Brisbane.

4.2 Key Stakeholders

- Tourism Queensland
- Regional Tourism Organisations
- Department of Main Roads
- Local Government Authorities
- Accredited Visitor Information Centres
- Key operators

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

Table 3 Summary of Highway Stakeholder Groups

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	9	3	3	5
Capricorn Highway	7	2	3	3
Great Inland Way	16	5	5	6

Key implications for the Leichhardt Highway include:

- Large number of LGA stakeholders in Queensland and New South Wales.
- Large number of RTOs, LTOs and LGAs (all of which have competing marketing plans).
- Challenges associated with establishing a management/marketing group and maintaining continuity of this group when so many stakeholders exist.

4.2.1 Regional Tourism Organisations

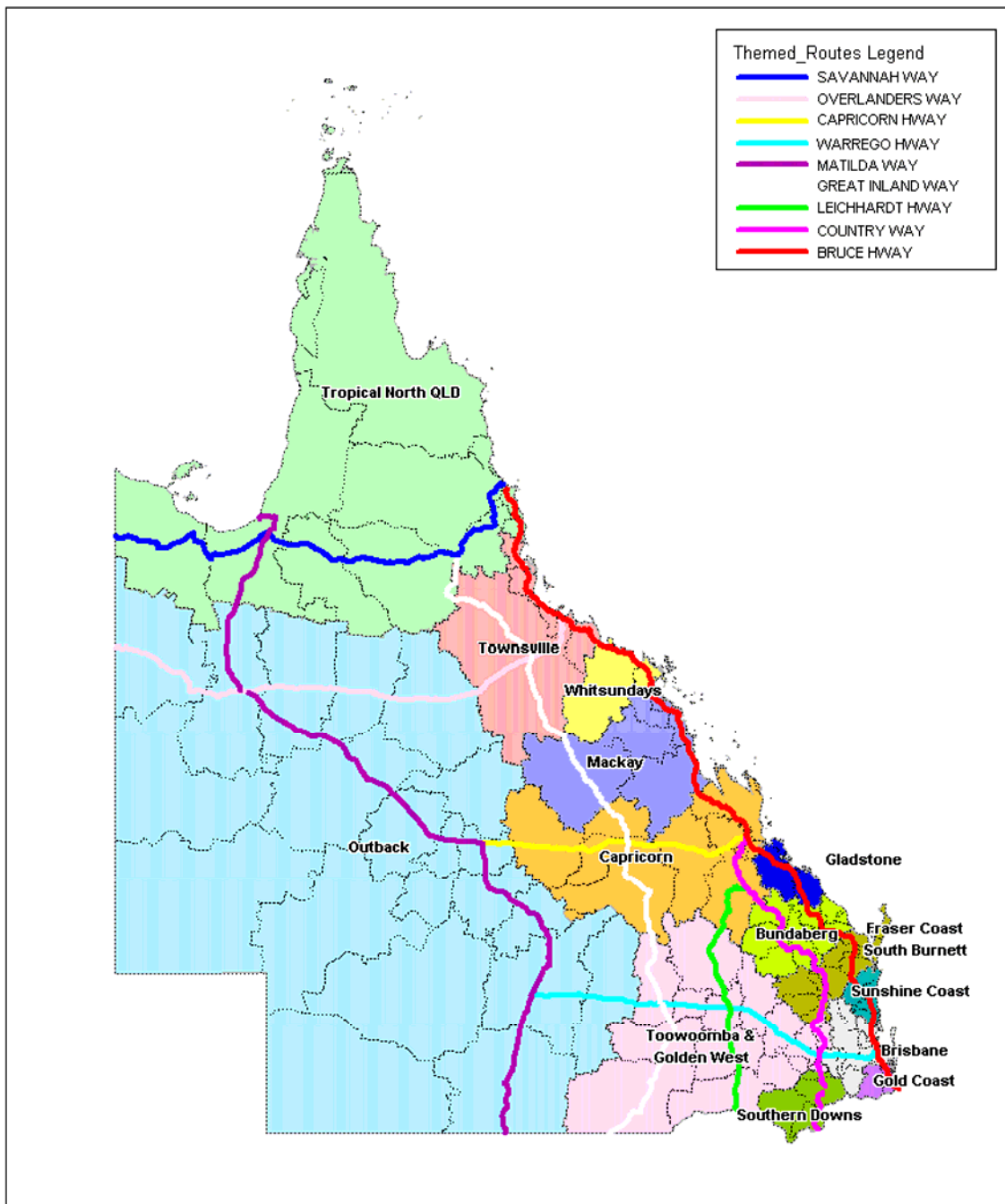
There are fourteen official RTOs in Queensland. RTO regions are shown in Figure 5. The traditional role of RTOs has been one of marketing, but as the industry has developed in recent years, the role of some of the larger RTOs has increased to include research, product upgrading and development, encouraging 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 Leichhardt Highway is shown in Figure 3.

Figure 4 Map of Routes and Regional Tourism Organisations



Source: Tourism Queensland, 2004.

The Leichhardt Highway passes through three RTO regions in Queensland (Gladstone Area Promotion and Development is now included as one of three RTOs transected by the highway, after then transfer of membership of Banana Shire from Capricorn Tourism to the Gladstone Area Promotion and Development). This review found that Toowoomba & Golden West Regional Tourist Association had the most extensive representation of the Leichhardt Highway of the three RTOs. Without support and backing of all three RTOs, it will be difficult to sustain consistent marketing collateral and to make the corridor attractive to consumers.

4.2.2 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 4.

Table 4 Main Roads Regions and Districts

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

Source: Strategic Tourism Roads Study, 2000.

4.3 Management of Road Corridors

4.3.1 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.

4.3.2 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.

4.3.3 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 Themed Route Signage. Refer to the brochure enclosed as Attachment 5.

The Focal Point System is a system employed to determine place names for inclusion on guide signs. Correct application of the system will product 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.

4.3.4 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

There are five accredited visitor information centres along the Leichhardt Highway at Goondiwindi, Miles, Rockhampton (Customs House and Capricorn Spire), and Yeppoon.

In addition are five other information centres along the route:

- BP Garage, Tara
- Juandah Heritage Centre, Wandoan
- Theodore Information Centre
- Moura Information Centre
- Mt Morgan Information Centre

4.3.5 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.

The Leichhardt Highway spans three Main Roads districts:

- Central District
- South Western District
- Border District

5.0 DEMAND PROFILE

5.1 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)
- Queensland Road Travellers Survey – Final Report (May 2002)
- Yann Campbell Hoare Wheeler – Road Travellers Study (December 1999)

5.1.1 Drive Tourism and Touring Market Review

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 the table below.

Table 5 Comparison of States/Territories as Drive Destinations

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 (the Kimberley), 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 discussed the three types of needs of Touring Market consumers:

- Emotional needs (affiliation): a feeling of belonging, strengthening relationships between couples, families and friends, being part of smaller communities, feeling part of the environment.
- The social identity needs: tourers want to be seen by others as friendly and welcoming, interesting and active, want to see the “real country” and experience an egalitarian style of holiday.
- Functional needs: touring to provide lots to see and do, meeting locals, sharing time together.

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.
- Caravaners 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.

5.1.2 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 Queensland 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:

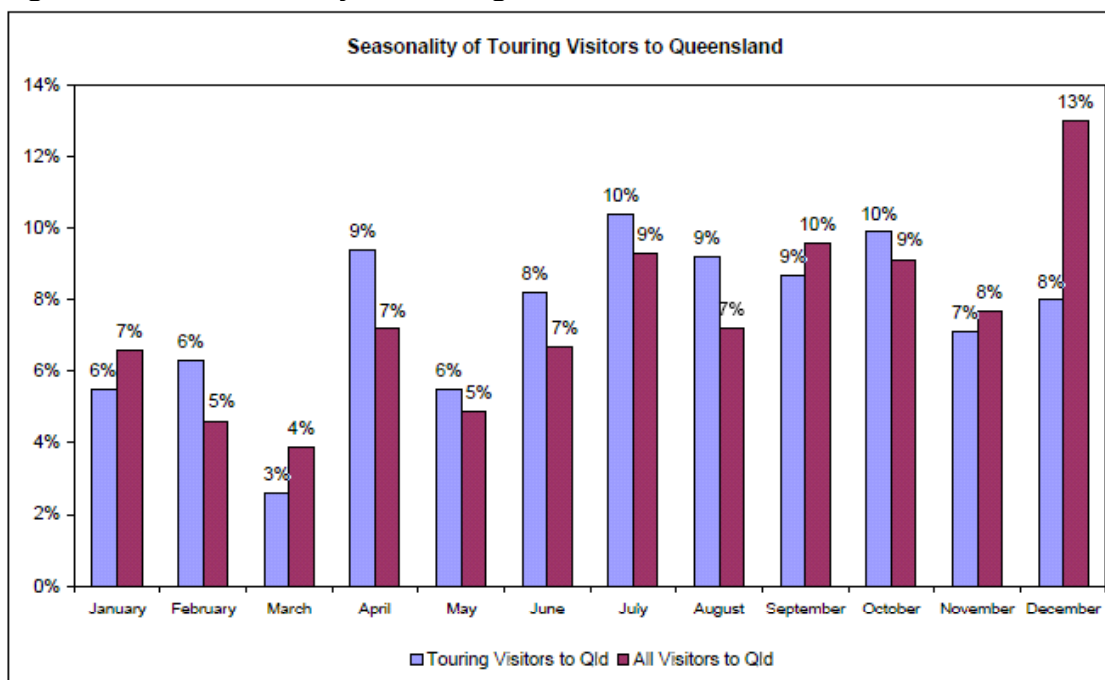
- The “trip of a lifetime”
- Primarily interstate (71%)
- Mostly older retired couples from the southern states
- Smallest market (2% of all drive visitors to Queensland)
- Highest overall spend (over \$2,700 per person per trip)
- Growing steadily (9%)
- Total worth = \$0.6 million
- Very important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

The latest (for the year ending June 2004) Drive Market Fact Sheet produced by Tourism Queensland provides a useful insight into among other things, the seasonality of travel, information sources used, and activities undertaken by the drive market compared to all travellers to Queensland.

Seasonality

Touring visitors⁴ were more likely than all visitors to Queensland to travel outside peak holiday times (May, June, July, August, and October).

Figure 5 Seasonality of Touring Visitors to Queensland



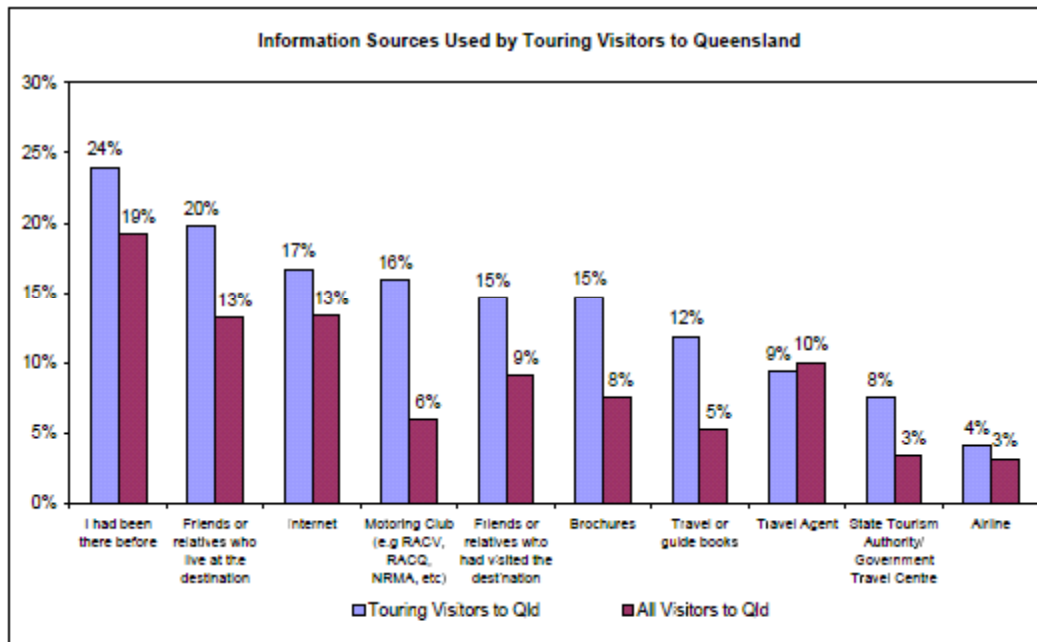
Source: Tourism Queensland, The Drive Market, year ending June 2004.

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.

⁴ “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 6 Information Sources Used by Touring Visitors to Queensland

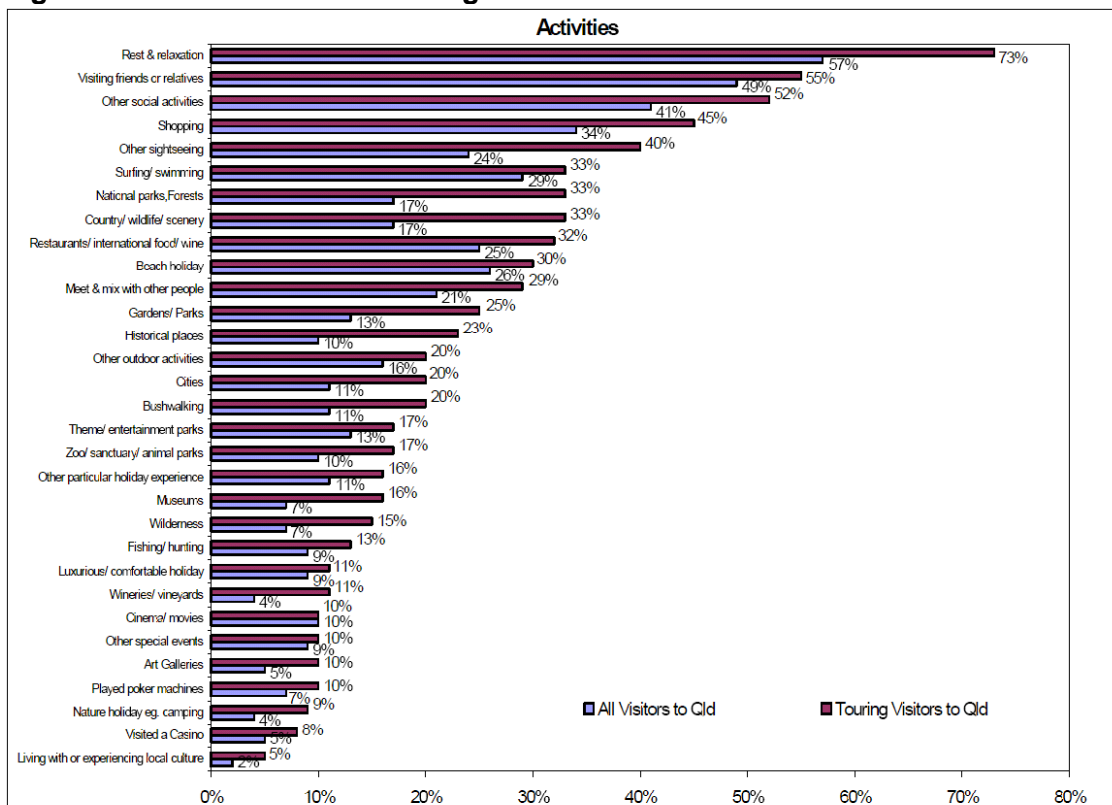


Source: Tourism Queensland, The Drive Market, year ending June 2004.

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.

5.1.3 Queensland Road Travellers Survey

Enhance Management was commissioned by Tourism Queensland to enhance the 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.

5.1.4 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 group 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.

5.2 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 132,000 long-haul light vehicles on the route from Goondiwindi to Miles per annum, carrying an estimated 225,000 people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 72.5%, resulting in a minimum of approximately 163,000 visitors in 2003.
- There are at least 107,000 long-haul light vehicles on the route from Miles to Rockhampton per annum, carrying an estimated 181,000 people. The 1999 Strategic Tourism Roads Study estimates tourist traffic on this route at around 27.4%, resulting in a minimum of approximately 50,000 visitors in 2003.

5.3 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.

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 below table 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 Leichhardt Highway are shaded.

Table 6 Summary of DMP's and Drive Tourism Elements

REGION	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

REGION	PRIMARY MARKETS	DRIVE MARKETING	DRIVE DEVELOPMENT
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 & 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
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 Leichhardt Highway include:

- Linkages with SEQ Country Touring Guide (Bunya Country Tourism Drive)
- Links to National Parks/4WD routes and tourist drives
- Links to the Newell Highway Guide and website
- Potential market segments include Big Tour, Grand Tour and Adventure

5.4 2003 Drive Tourism Market Review

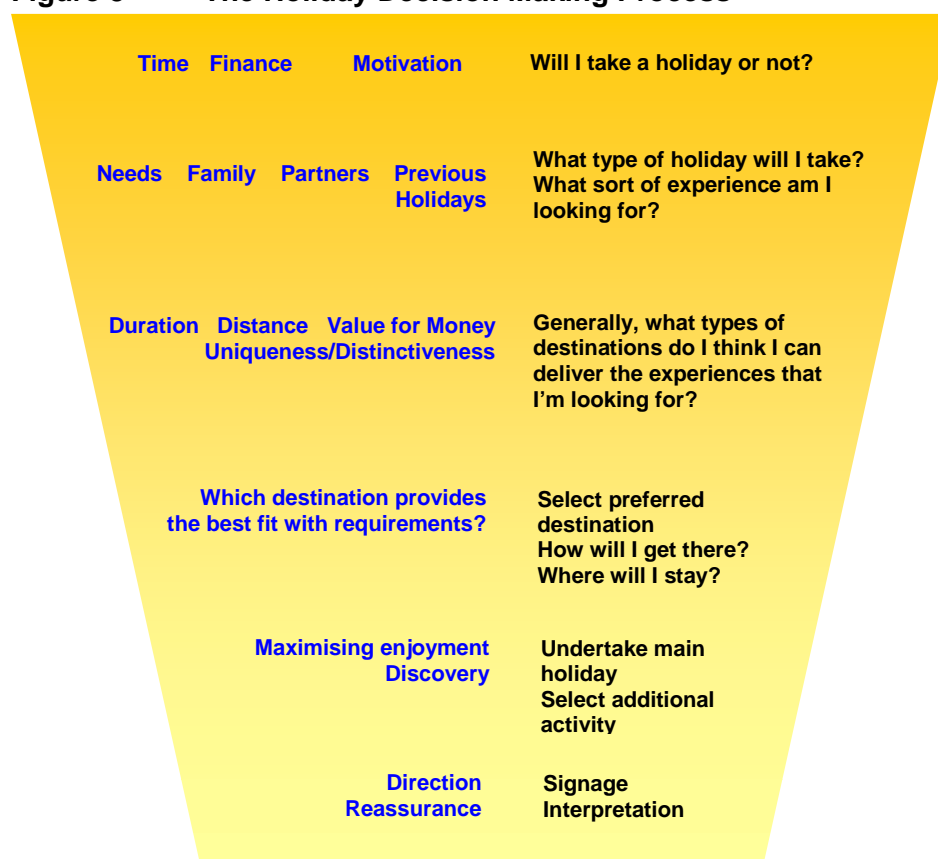
The whole of state or multi-region actions of Tourism Queensland are informed by the 2003 Drive Tourism Market Review. As identified earlier, this review highlighted four key markets for Queensland to focus on:

- Fly drive
- Caravaners
- 4WD enthusiasts
- Accommodated touring

The road experience process (see figure following) can be summarised as follows:

- It starts with a desire to take a drive holiday, created through market awareness and regional marketing initiatives.
- Desire becomes a plan, 80% of people choose the destination first.
- 60% of the travel plan is put into place at home.
- To establish the plan, they use maps 48%, brochures 47% and previous knowledge 44%.
- Once on the road the Visitor Information Centres and maps are key to the experience.
- Signage plays a lesser role and pull-over bays even less so.

Figure 8 The Holiday Decision Making Process



Source: Colin Bransgrove, 2000.

5.5 Drive Route Typology

Tourism Queensland recently released a guide to developing and marketing Tourism Drive Routes. This document outlines the four different types of routes as the visitor sees them.

Table 7 Drive Route Typology

Route Type	Characteristics	The Challenges	Examples
National Highways	The main roads people travel on. Typically they have better quality road infrastructure, have high amounts of traffic and are marked as the main routes on most maps.	Need to focus on visitor awareness of the product along the route. Give a reason to stop on the road on which they're already travelling.	Bruce Highway Warrego Highway
Themed Routes	Often thought of by communities as the only or best tourism drive route. They are linked by a common theme or experience with a logo and brand.	They take a lot of work and commitment and while they can present a critical mass of product to attract visitors, one bad experience can affect the entire route.	Matilda Highway Explorers Way
Touring Routes	Typically less trafficked routes, they present visitors with a practical reason to choose the route – it is more direct or has less traffic.	Need to communicate to your market as early as possible so your route is a viable option. Once you have them then you need to stop them.	Great Inland Way Country Way
Local Tourist Drives	Primarily comprising route markets, short-loop or alternative routes.	If signage is planned it must be done through DMR or your Council.	Moreton Bay Tourist Drive Cobb and Co Tourist Drive

For 80% of drive travellers, the destination is the primary factor in deciding where to holiday, whereas for 20%, the experience offered by the route is key. For the majority of travellers focusing on their destination, a quality tourism drive route may offer an alternative and interesting way to get to their destination.

5.6 Tourism Queensland Research - Leichhardt Highway

Findings from these studies relating to respondents who travelled along all or some of the Leichhardt Highway 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 (77%+ both studies).
- The proportion towing a caravan was higher in the Queensland study (64%) than in the Central Queensland study (33%), although Big 4 caravan parks were used to source respondents in the Queensland study. Interestingly, the proportion towing a caravan in both studies was higher for travellers using the Leichhardt Highway than for travellers using other Queensland routes.
- A large proportion of those using the Leichhardt Highway described their overall trip as “touring around” (71%) rather than “driving straight to a main destination and back”, similarly to those using the Warrego (73%) and Capricorn Highways (75%). A higher proportion of those using the Matilda Way (85%), Great Inland Way (85%) and Overlander’s Way (84%) described their trip in this way.
- Almost two-thirds of those using the Leichhardt Highway and the Warrego Highway stayed overnight at 11 or more locations during their overall trip (63% and 61% respectively). 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.
- Of the nine strategic Queensland routes, the Leichhardt Highway had the highest proportion of travellers aged over 55 years (67%). This proportion is similar to the profile of travellers using the Great Inland Way (63%), the Matilda Highway (62%) and the Capricorn Highway (61%).
- The main sources of information for travellers using the Leichhardt Highway were: previous knowledge or experience of travel in Queensland, maps and brochures obtained from motoring organisations, caravan/camping shows and caravan park associations/clubs.
- Almost two-thirds of those using the Leichhardt Highway obtained information from a Queensland Visitor Information Centre whilst on their trip (61%), similarly to those using the Capricorn (62%) and Warrego (59%) Highways.
- In both studies, around 60% planned some of their trip (i.e. route taken and towns visited) before leaving home. Interestingly, in the Queensland study 17% of Leichhardt Highway travellers had planned their route fully, which was higher than the proportion who had done so on other routes. Overall, however, the extent of route planning for users of the Leichhardt Highway was similar to users of the other touring routes.
- Any pre-trip planning that was undertaken was quite flexible while en-route, with 41% of Leichhardt Highway travellers making unplanned overnight stops during their trip. A similar proportion of those using the Capricorn and Warrego Highways also made unplanned overnight stops (42% and 40% respectively). In contrast, visitors on other corridors were more flexible with over 60% of travellers using the Overlander’s Way, the Savannah Way and the Matilda Highway indicating that they had made an unplanned overnight stop.
- Three-quarters of respondents in the Queensland study were spending 1 month or more away from home (75%). However, while similar to users of the Capricorn Highway (71%), 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%).
- Compared to the other strategic routes, the Leichhardt Highway had the highest proportion of travellers who had toured around Queensland by motor vehicle previously in the last three years (78%).
 - In terms of immediate travel party, the profile of travellers using the Leichhardt Highway was similar to those using the Capricorn Highway and the Savannah Way. The majority were travelling as an adult couple (73% each route) and around one in five were travelling as a family group (18% Capricorn Hwy vs 17% Leichhardt Hwy vs 16% Savannah Way).
 - Over half of those using the Leichhardt Highway described their household as 'later family with no children living at home', with the same proportion stating the work status as 'retired' (57% each). Compared to the Country Way, Capricorn Highway, Great Inland Way and the Pacific Coast Way, the Leichhardt Highway had the highest proportion of travellers in these groups.
 - Approximately 97% of those using the Leichhardt Highway were domestic visitors, with 32% from Victoria, 24% from Queensland and 20% from New South Wales. In addition to having the highest proportion of domestic visitors, the Leichhardt Highway also had the highest proportion of visitors originating from Victoria (compared to the other strategic routes).
 - According to the Central Queensland study, the main reason respondents cited for travelling on the Leichhardt Highway was "I need to travel on it to get where I am going" (68%). The proportion citing this reason was higher for those travelling on the Capricorn Highway (86%), the Great Inland Way (76%) and the Pacific Coast Way (70%). Compared to the Country Way, Great Inland Way, Pacific Coast Way and Capricorn Highway, the Leichhardt Highway had the highest proportion of travellers who indicated they had chosen the route because it was quieter and had less traffic (15%).
 - The top three reasons cited as barriers to travel to Queensland in the future by adult couples using the Leichhardt Highway included: "unacceptable condition of roads/highways" (37%), "fuel prices" (17%) and "weather" (9%). For families using the Leichhardt Highway, the top three reasons were: "fuel prices" (22%), "unacceptable condition of roads/highways" (19%) and "distance" (16%).
 - Compared to the other Queensland routes, the Leichhardt Highway had the highest proportion of travellers who said they would 'definitely', 'probably' or 'possibly' return to Queensland on a motoring holiday in the next three years (94%).

5.6 Route Awareness

The awareness of Queensland's themed routes was recently investigated in the Regional Route Travellers Study (2004). The Leichhardt Highway was the fifth most recognised route amongst road travellers in Queensland, with 60% of respondents having heard of it before. A similar level of awareness was evident for the Warrego Highway (62%). The following table lists the awareness levels for each of the routes tested in the study.

Table 8 Summary of Highway Awareness Levels

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%

6.0 DRIVE MARKET RESEARCH – WHAT DOES IT TELL US ABOUT THE LEICHHARDT HIGHWAY?

Outlined on the following page is an overview of drive market research in Queensland as it relates to the drive corridors. The table also provides a comparison between each corridor. Key issues for the Leichhardt Highway include:

- There is slightly more traffic along the southern half of the route (Goondiwindi-Miles) than the northern half (Miles-Rockhampton)
- The main markets are older travellers, family groups, and some tour groups.

The Leichhardt Highway has:

- The largest proportion of visitors travelling with caravans of all nine routes
- Travellers who take less stops per trip
- A high proportion of visitors who are destination focussed (“I need to travel on it to get to where I am going”)
- Have travellers who prefer the route because it is quieter
- A reasonable level of awareness, possibly because it is an established highway and has the name of a famous explorer (79%)
- The highest proportion of travellers who had toured around QLD by motor vehicle previously in the last three years (78%).
- The highest proportion of visitors originating from Victoria (32%)
- A large number of national parks in close proximity (most are relatively undeveloped, with limited access).
- Alternative routes to Central Queensland - Country Way and Pacific Highway as either complementary or competitive routes

Table 9 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-Qld Border	Bris-Mary	Mary-Rock	Rock-Town	Town-Cair	Wall-Toow	Toow-Rock	Hebel-Roma	Roma-Em	Em-CT
Tourist Traffic (%)	14.3%	34.1%	72.5%	27.4%	1.7%	2.4%	52.5%	47.3%	16.2%	7.5%	12%	87.2%	2.4%	12.4%
Visitor No.	137,000	62,000	163,000	50,000	560,000	97,000	900,000	578,000	244,000	110,000	31,000	74,000	4,000	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% 54%/18%		77% 64%/33%		70% 44%/19%					70% 51%/28%		65% 58%/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 Family/friends recommendations		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%)		

6.1 What are the Implications for the Leichhardt Highway?

- Caravan / camping / motorhomes and four wheel drives are the key markets for the Leichhardt Highway e.g. there is a level of fit between these markets and the products / experiences offered by Leichhardt Highway.
- If 80% of people select the destination first, which destinations drive travel along the Leichhardt Highway?
- Visitor Information Centres are important in providing information to travellers on the Leichhardt Highway. How well is information presented at the present time? E.g. wall charts / interpretation panels etc.
- Few travellers appear to both up and back on the Leichhardt Highway route
- Main information services include maps, motoring organisations, and VICs en-route.
- The Leichhardt Highway must link with the marketing plans of RTOs.
- How can the Leichhardt Highway work closer with caravan, camping and motorhome and four wheel drive organisations?

7.0 PRODUCT AUDIT

There is a variety of man made attractions and events and natural attractions generally accessible to visitors from the Leichhardt Highway, forming part of the potential experiences during the trip. These tourism products and services are outlined in the following sections.

7.1 Man-Made Products/Attractions

Shire	Attraction	Event
Banana Shire	Central Queensland Gliding Club	The Great Baralaba Saratoga Classic
	Open cut mine	Coal & Country Festival
	The Flagstaff	
	Old Butter Factory Museum?	
Fitzroy Shire	Gracemere Sale Yards	
Goondiwindi	Customs House	Spring Festival
	Macintyre Cotton Gin	
Livingstone Shire	Queensland Wildlife Hospital Inc	Festival of the Wind
	The Singing Ship - Emu Park	EGR Amateur Golf Championship
	Festival of the Wind	Junior Classic Open Golf Keppel Club Annual Shell Show
	Shellhouse	Pro-Am Golf Classic
	Keppel Island Dive Centre	Ladies Team Challenge
	Skydive Great Keppel Island	St Brendans College Rodeo
	Marlborough Historical Museum	World & Australian Cooe Competition
	Stanage Bay Marine & Accommodation Centre	Yeppoon Tropical Pinefest
	Funny Farm	
	Cooberrie Park Fauna & Flora Sanctuary	
	Doll Yeppoon Antiquities Museum	
	Paint Pot Gallery	
	Australis Cruises	
	Capricornia Barrier Reef & Island Cruises	
	Keppel Reef Scuba Adventures	
	Shays Extreme Rides	
	Skydive Capricorn Coast	
	Coowonga Crocodile farm	
Murilla Shire		Condmine Rodeo

Shire	Attraction	Event
Mt Morgan Shire	Mt Morgan Historical Museum	
	Mount Morgan Historical Railway Station	
	Mount Morgan Mine Tours	
	Mt Morgan Swinging Bridge	
	Mt Morgan Gold And Copper Mine Closed?	
Murilla Shire	Miles Historical Village	
	Dogwood Crossing Gallery	
	Premier Safaris	
Rockhampton	Dreamtime Cultural Centre	Arcade Car Park Markets
	Glenmore Homestead	Beef Australia 2003
	Capricorn Reef Diving	The Caves Cowboy Classic
	Skootas	Rocky Rush Challenge and Campdraft
	Dreamtime Cultural Centre	Rocky Markets
	Rockhampton Heritage Village	Rocky City Games
	Glen Ellen Riding Centre	Rocky Barra Bounty
	Archer Park Station & Steam Train Museum	Rockhampton Winter Racing Carnival
	Bull Statues - Rockhampton	Labour Day Folk Festival
	Calliope River Historical Village	Chinese Festival
	Central Queensland Military Museum	Big River Jazz Festival
	Coastline Fast Karts	
	Koorana Crocodile Farm	
	Mi Art	
	Quay Street Heritage trail	
	Rockhampton Art Gallery	
	Rockhampton Botanic Gardens	
	Rockhampton Heritage Village	
	Rockhampton Zoo	
	Capricorn Coast Trail Rides	
	Duncan's Off Road 4WD Driver Training	
	Get About Tours	
	Independent Tours - Aust Pty Ltd	
	Project Challenge Inc	
	Rockhampton Model Aero Club	
	Two Up Tours	
Tara Shire	Tara Festival of Culture	Tara Festival of Culture
		Western Downs Camel

Shire	Attraction	Event
		Races
Taroom	Juandah Heritage Centre	
	Glebe Weir	

7.2 Natural Products/Attractions

Banana Shire

- Cania Gorge National Park
- Kroombit Tops National Park & State Forest

Goondiwindi Town

- Botanic Gardens

Livingstone

- Cammoo Caves
- Capricorn Coast National Park
- Olsens Caves
- Byfield State Forest

Rockhampton City

- Olsen's Capricorn Caves
- Mt Archer National Park

Tara Shire

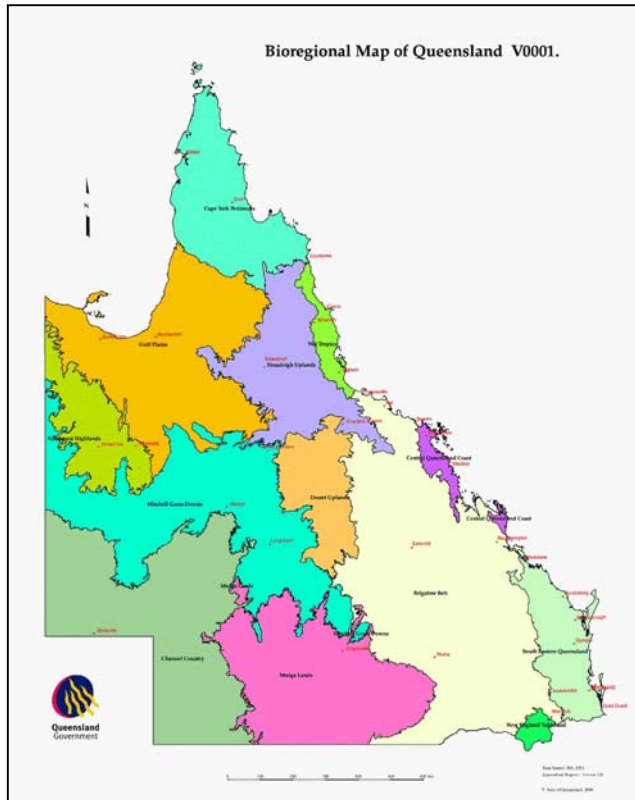
- Park Botanic Garden
- Southwood National Park
- Grace Park Nature Reserve
- Erringibba National Park

Taroom Shire

- Gorge National Park
- Lake Murphy Conservation Park
- Expedition National Park
- Palmgrove National Park
- Precipice National Park
- The Leichhardt Tree

The Leichhardt Highway passes through the Brigalow Belt bioregion, characterised by a range of ecosystems including eucalypt forest and woodland, grassland, dry rainforest, cypress pine woodland and riparian communities. It encompasses the following areas:

Figure 9 Queensland Bioregions



- Barakula/Mooni-Barwon Interfluve/Mount Morgan Ranges/Southern Downs/Weribone High/Moonie – Commonon Creek Floodout/MacintyreWier Fan
- 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 Dummond Basin

7.3 Iconic Attractions/Experiences

Route features and unique selling points include:

- Towns along the route boast several historical/ heritage sites and a small section of the route was traversed by the explorer after which it was named in 1844.

Figure 10 Leichhardt's 1844 Journey



- A range of National Parks and scenic spots including Isla Gorge and Expedition National Parks.
- Potential visitors could be encouraged to use the Leichhardt Highway as an alternative route to the Central Queensland region, instead of the Bruce Highway/ Pacific Coast Way. There is also the opportunity to promote the Leichhardt Highway as an alternative 'loop route' in conjunction with the Country Way or Great Inland Way (i.e., up one route and back another).

7.4 Competitive Advantage

Compared to the other Drive Tourism Stage Two routes, the Leichhardt Highway has the advantages of:

- An easy to drive route between southern states and Central Queensland (relatively, flat, straight and fast)
- A variety of National Parks
- A high level of existing awareness associated with Leichhardt and potential to build on this by theming the route in a distinctive way

7.5 Thematic Linkages

Attractions and features that potentially could form part of a thematic linkage along the route include:

- The heritage of Leichhardt (and other explorers of the region) and individual towns along the route

- Fishing
- National Parks
- 4WD opportunities in relatively undeveloped areas

8.0 HARD INFRASTRUCTURE AUDIT

8.1 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 6.

Table 10 Main Roads Regions and Districts

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

Source: Strategic Tourism Roads Study, 2000.

8.2 Road Condition

According to Department of Main Roads data, features of the Leichhardt Highway road network are as follows:

- Single sealed carriageway (bitumen), two lanes.
- Seal width along the majority of the route ranges between 7.01m and 9.1m, although in some sections seal width ranges between 5.81m and 6.4m.
- The percentage of heavy vehicles using the route ranges between 20% and 30% for the Goondiwindi to Dululu section.

According to the Royal Automobile Club of Queensland (RACQ) website, several sections of the Leichhardt Highway are subject to flooding, including:

- Between Goondiwindi and Moonie;
- Moonie River (13km north of Moonie);
- Undulla Creek (21km north of The Gums);
- Columboola Creek (8km south of Miles);
- Between Miles and Taroom; and
- Lonesome Creek Bridge (19km north of Theodore).

Table 11 Highway Sections Subject to Flooding

<i>Origin</i>	<i>Destination</i>	<i>Places</i>
Goondiwindi	Moonie	1
Moonie	The Gums	1
The Gums	Condamine	1
Condamine	Miles	1
Miles	Wandoan	0
Wandoan	Taroom	0
Taroom	Theodore	1
Theodore	Banana	0
Banana	Rannes	0
Rannes	Wowan	1
Wowan	Dululu	1
Dululu	Mount Morgan	0
Mount Morgan	Bouldercombe	0
Bouldercombe	Rockhampton	0
Rockhampton	Yeppoon	1
		8

8.3 Planned upgrades

Over the next few years, DMR have Realign and install new culverts a range of improvements planned for the Leichhardt, mainly in the areas of widening and sealing or road sections and shoulders and routine maintenance. Specific plans are shown in the following table.

Table 12 DMR Roads Implementation Program 2003-04 to 2007-08

Local government	Dist.n o.	Project	Road	Location	Total cost \$'000	Actual/indicative allocation					Work description
						2002-03 \$'000	2003-04 \$'000	2004-05 \$'000	2005-06 \$'000	2006-07 \$'000	
National Highways											
Waggamba	5	122/26C/21	Leichhardt Highway (Miles - Goondiwindi)	Murri Murri (204.73 - 206.3km)	5,239	5,020	219				Realign and install new culverts
State Controlled Roads											
Waggamba	5	122/26C/804	Leichhardt Highway (Miles - Goondiwindi)	Shire boundary - south (133.0 - 136.0km)	600				600		Rehabilitate pavement
Tara	5	113/26C/301	Leichhardt Highway (Miles - Goondiwindi)	54.5 - 57.8km	1,950	300	1,650				Widen and seal
	5	113/26C/302	Leichhardt Highway (Miles - Goondiwindi)	Sections : 98.0 - 111.0km (section 1)	2,000		39	1,130	831		Widen and seal
	5	113/26C/303	Leichhardt Highway (Miles - Goondiwindi)	Sections : 98.0 - 111.0km (section 2)	2,000				2,000		Widen and seal
	5	113/26C/304	Leichhardt Highway (Miles - Goondiwindi)	Donohughes Road - Western Road : Sections (64.92 - 71.05km)	1,120		560	560			Widen and seal
	5	113/26C/305	Leichhardt Highway (Miles - Goondiwindi)	South of The Gums - Moonie River : Section 3 (86.7 - 114.5km)	2,000				480	1,520	Widen and seal
Taroom	4	116/26B/30	Leichhardt Highway (Taroom - Miles)	41.58 - 47.3km	1,522	62			1,460		Seal shoulders
	4	116/26B/3	Leichhardt Highway	59.46 - 66.95km	1,661	158	773	730			Widen existing

	1	(Taroom - Miles)	(section 1)								pavement
	4	116/26B/3	Leichhardt Highway	41.58 - 51.61km							Widen existing pavement
	4	3	(Taroom - Miles)	(section 2)	1,120				1,120		Widen existing pavement
	4	116/26B/3	Leichhardt Highway	22.0 - 35.0km							Widen existing pavement
	4	5	(Taroom - Miles)	(section 1)	2,190				730	1,460	Widen existing pavement
	4	116/26B/3	Leichhardt Highway								Widen existing pavement
	4	9	(Taroom - Miles)	22 - 35km (section 2)	1,680				560	1,120	Routine maintenance
	4	116/26B/6	Leichhardt Highway	Sections : Bulk							
	4	34	(Taroom - Miles)	Maintenance	550		110	110	330		

DMR Roads Implementation Program 2003-04 to 2007-08 (continued)

Local government	Dis t.n o.	Project	Road	Location	Total cost \$'000	Actual/indicative allocation					Work description
						2002-03 \$'000	2003-04 \$'000	2004-05 \$'000	2005-06 \$'000	2006-07 \$'000	
Banana	6	8/26A/304	Leichhardt Highway (Westwood - Taroom)	Pocket Creek - Blowhard Creek	3,550				3,550		Rehabilitate pavement
	6	8/26A/307	Leichhardt Highway (Westwood - Taroom)	Dawson River - 12 Mile Creek	3,300				3,300		Recycle pavement
	6	8/26A/309	Leichhardt Highway (Westwood - Taroom)	North of district boundary	3,080	115		1,428	1,537		Recycle pavement
	6	8/26A/312	Leichhardt Highway (Westwood - Taroom)	North of Bottle Tree Creek	752	51	71	630			Widen shoulder(s) and sealing
	6	8/26A/313	Leichhardt Highway (Westwood - Taroom)	Woolein Creek - 4 Mile Creek	1,300				1,300		Seal shoulders
	Mount Morgan	6	136/41E/206	Burnett Highway (Biloela - Mt Morgan)	Kearney's Gap	70	70			RBS	
6		136/41F/301	Burnett Highway (Mt Morgan - Rockhampton)	Dee River	850		850		R		At-grade intersection improvement
Livingstone	6	77/194/302	Rockhampton - Emu Park	West of Pattison Street	807	27		780			Widen existing pavement
	6	77/195/30	Yeppoon - Emu	Mulambin and	753	3			750		At-grade

	8	Park	Rosslyn Bay Roads						intersection improvement
6	77/196/30 1	Rockhampton - Yeppoon	Mackays Road - Hidden Valley	1,388	232	1,156			Widen and seal
6	77/198/80 1	Ogmore Connection	Styx River	382	2		380		Repair bridge to original condition
6	77/1941/3 02	Yeppoon - Tanby	Taranganba Road	670	17			653	Widen and seal
6	77/1963/8 07	Yeppoon - Byfield	Byfield Creek	400				400	Replace bridge with culvert

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

There are several rest areas designated for motorists (as distinct from areas designated for heavy vehicles) shown in the following table. Note that there are no designated rest areas on the Leichhardt Highway for motorists between Miles and Wowan, as distance of approximately 350 km.

Table 13 Designated motorist rest areas on the Leichhardt Highway

Rest Area Reference No.	Nearest Town	Distance From Nearest Town	Controlling Auth.
63	Goondiwindi	North Side	Local Govt
64	Goondiwindi	South Side	Local Govt
98	Goondiwindi	West Side	Service Club
491	Goondiwindi	21.3kmE	DMR
494	Goondiwindi	67.6kmN	BMR
540	Goondiwindi	Town	Local Govt
541	Goondiwindi	West Side	Local Govt
542	Goondiwindi	Town	Local Govt
543	Goondiwindi	Town	Local Govt
544	Goondiwindi	Town	Local Govt
600	Goondiwindi	East Side	Local Govt
600	Goondiwindi	East Side	Local Govt
211	Condamine	0.5kmE	Local Govt
678	Condamine	Town	Local Govt
67	Miles	0.8kmW	Local Govt
667	Miles	Town	Local Govt
654	Miles	Town	
770	Wowan	Town	Local Govt
650	Dululu	Town	

9.0 MARKETING PLANS

9.1 Tourism Considerations

Previous sections of this report reveal several issues from a tourism standpoint:

- Co-promotion with the Newell Highway is key.
- The potential for promotion of loops with the Country Way and Great Inland Way
- The suitability of the route to the target market (and possible need for more paid potable, grey and black water points along the route for caravans and motorhomes)
- Visitor statistics are needed for the route / regions.
- Variable market readiness in terms of product (accommodations, VICs, attractions etc.)
- The Leichhardt Highway is 2.5 hours shorter (Sydney-Rockhampton) and 4 hours shorter (Melbourne-Rockhampton) than the Country Way and Pacific Highway
- Has the name of a famous explorer, which could be combined with the undeveloped nature of many National Parks and rustic nature of man made attractions, into an adventure-style theme and brand
- How to better engage with, and leverage the resources of the three RTOs involved.

9.2 SWOT Analysis

The following table summarises the main strengths, weaknesses, opportunities and threats facing the Leichhardt Highway as a touring route.

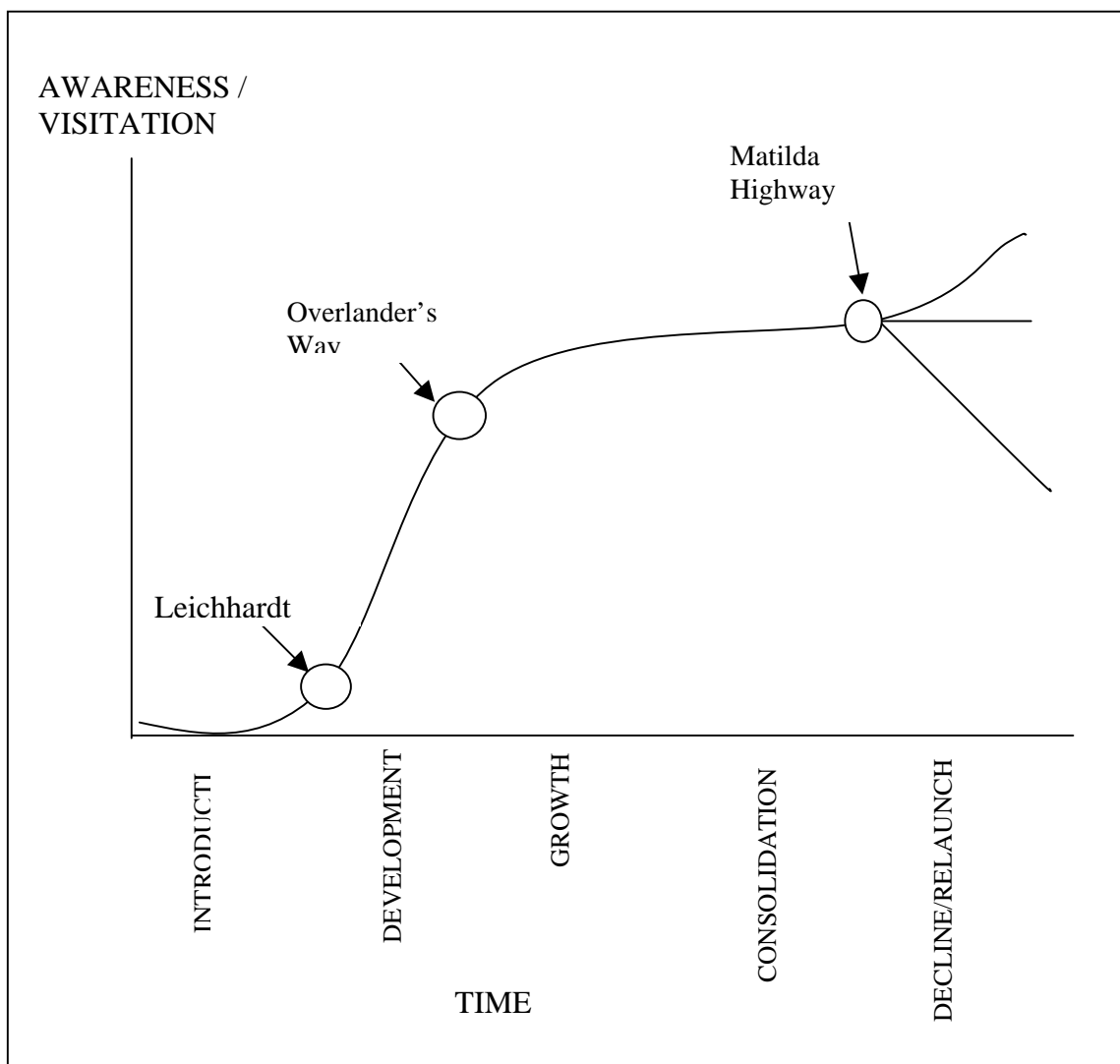
Table 14 Leichhardt Highway Tourism Route SWOT

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • National touring route Highway 39 (3 states) • Fully sealed route. • Strategic route (north-south). • Recognised as a state strategic touring route. • Fastest route to Rockhampton from Sydney and Melbourne • Committed chair • Attracts a large proportion of 'point-to-point' travellers. • One in three visitors on the route is from Victoria. • Favoured by caravanners for its straightness, lack of hills and speed of travel. • Less congestion than the coastal routes. • Small town experiences. 	<ul style="list-style-type: none"> • Attracts travellers who make fewer stops per trip and who are less willing to make changes to their planned journey. • Competition from four other routes with one RTO • The number of heavy vehicles on the route pose a challenge to visitor safety and the experience • Low take-up of market collateral • Lack of resourcing for product development • The Leichhardt/Newell interface is not seamless from a visitor experience standpoint – the Leichhardt doesn't connect with its main markets in Sydney and Melbourne (it starts at the Qld border). • Logistical issues for organisational matters. • Signage along the route (apart from that outside the larger towns) • Lack of icon attractions. • Few products along the Leichhardt are listed on the Australian Tourism Data Warehouse.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Dedicated corridor brochure (existing brochure upgrade) 	<ul style="list-style-type: none"> • Perception that the route may be in direct competition with the Country Way.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Incorporate with RTO marketing brochures (brochure inserts) • Interpretation within VICs • Caravan, camping and four wheel drive markets • Service points for caravaners along the route • Improve service infrastructure (small towns) • Cohesive, cooperative and integrated marketing of the route with other stakeholders (collateral, branding, websites, brochuring, etc), and a plan for doing this. • Access and basic visitor amenities at less developed National Parks • Enhance and strengthen the VIC network. • Improve training of VIC staff • Improve tourism/service signage • The “Leichhardt Experience” / “Leichhardt Legend” / “Footsteps of Leichhardt” 	<ul style="list-style-type: none"> • Logistical issues (difficult to manage) • Lack of resources • Not seeing the big picture. • Not leveraging off the strategies and cooperative marketing undertaken by RTOs • Emphasis on the Leichhardt as simply a ‘vehicle corridor’ rather than a ‘visitor corridor’ or tourism route.

The following figure suggests that the Leichhardt Highway is at its early stages of maturity as a themed touring route compared other, more established highways.

Figure 11 Indicative lifecycle positioning of the Leichhardt Highway



Adaptation of Butler's Tourism Development Curve for Selected Tourism Themed Routes in Queensland.

9.3 Market Positioning

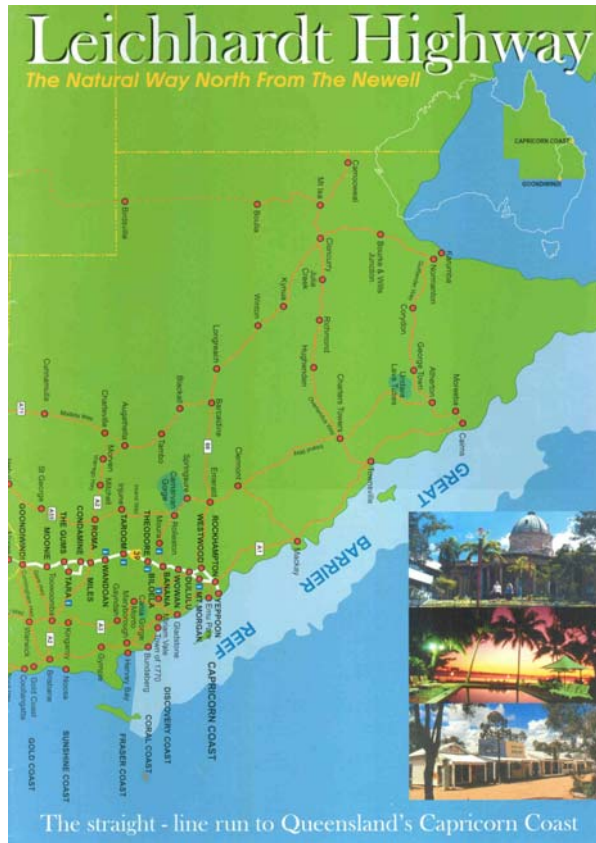
Compared to the other Great Inland Way, Country Way and Capricorn Highway (see Attachment 6), the Leichhardt Hwy has:

- Higher awareness, more point-to-point, less touring
- A good national link to Melbourne
- Dubbo and Rocky/Capricorn Coast as destination foci
- Dispersed small towns / service hubs
- Modest attractions (mines, undeveloped National Parks) and more recognised Capricorn Coast)
- More caravan/campervan & 4WDers
- Similar organisational structure to some routes
- Similar product development challenges (no plans for any substantive new product or signage for the Leichhardt)

- Undertakes similar marketing activities

9.4 Collateral

The Highway and Committee's main expenditure and marketing vehicle is a the Leichhardt Highway brochure.



The Committee has also developed a web page

(<http://www.leichardthighway.com>),

which is linked to the Capricorn Tourism website, but no other websites as yet.

There is also good exposure of the highway in Tourism Queensland's Motoring Holiday Guide and Motoring Holiday Website, and also the Toowoomba & Golden West Regional Tourist Association's Western Downs Touring Guide.

Various taglines have been used for the highway in recent years, including:

- *The natural way north from the Newell*
- *The straight line run to Queensland's Capricorn Coast*
- *39 steps of pure pleasure across 8 shires*
- *If you know Newell you'll love Leichardt*

10.0 DRAFT ACTIONS AND RECOMMENDATIONS

This section summarises the outcomes of the 6 December workshop with the Leichhardt Highway (39) Promotions Association Inc., Committee. The draft actions and recommendations have subsequently received the broad support of the Committee.

10.1 Vision

The vision needs to describe what would be achieved if the Leichhardt Highway is developed and promoted to its full potential. It is suggested that initially, the timeframe coincide with the duration of Stage 2 of the Drive Tourism Program. The proposed vision statement is:

To have achieved by the end of the three year Drive Tourism Program Stage 2, documented growth in new and existing target markets and an increase in visitor expenditure along the route, by enhancing the physical attributes of the highway, developing tourism product, putting in place a distinctive explorer's experience and/or theme, and implementation of a variety of coordinated and cooperative marketing initiatives.

10.2 Mission/Purpose

In working towards the vision, the purpose of the Drive Tourism Program (Stage 2) for the Leichhardt Highway might be to:

- Grow new markets
- Increase visitor numbers from existing target markets
- Encourage visitors to **explore** the corridor (stopping and spending more)
- Enhance the visitor's experience by means of clear signage rest and pullover areas, etc.
- Creating awareness and ensuring promotional material is available to target markets pre-departure and enroute.
- Develop tourism product and entrepreneurship

10.3 Positioning

Positioning refers to the way that the Leichhardt Highway is perceived by its visitors relative both to other routes in Queensland, and routes in the area where they live. A strong, positive identity is a prerequisite for establishing a strong positive image and sustaining visitation in the long term.

From a product perspective, the Leichhardt Highway itself can be distinguished by:

- Its status as a state touring route
- Its recognition and high level of awareness as the **Leichhardt** Highway
- It being the fastest and easiest way to travel between Sydney and Melbourne, and Central Queensland (in terms of it being relatively flat, straight, having a generally good quality road surface, limited traffic, and with reasonable spacing of towns and service centres)

From the prospective visitor’s standpoint the Leichhardt Highway appeals because it:

- Offers significant natural and environmental attractions, including several largely undeveloped National Parks
- Is part of the link between major population centres / markets in the south, with Central Queensland and the Capricorn Coast (*Straight line run to the Tropics – and/or straight line run from Central Queensland to New South Wales*)
- Lends itself to a person (Leichhardt) telling the explorer’s story (with contemporary hooks or twists) about each town - a story that also links all towns along the route (there may be other explorers and pioneering storied en-route to highlight as well).

These product strengths and potential visitor perceptions should be used to develop a strong and distinctive brand for the Leichhardt Highway which in turn should be used in various marketing and promotional media.

Specific brand benefits will need to be communicated to target audiences and will need to be closely linked to the strengths of the Leichhardt Highway. The challenge will be to present in one document or message, the utilitarian benefits associated with the highway as the ‘straight line run to the Tropics’ (and implied goal of more travellers) with the potential experiential benefits of using a Leichhardt theme to encourage visitors to explore the corridor and take the time to experience places along the route (and implied goals of increased length of stay and expenditure).

10.4 Target Markets

Primary, established target markets:

- Victorians (specifically, Melbournians)
- Caravaners (subsets - new vanners, upper class, ragtag, etc.)

Emerging and niche target markets:

- 4WD’ers
- Fishing enthusiasts (Bass to Bara trail, Dawson River)
- Bird watchers
- Events

10.5 Proposed Actions

The following section and tables summarise proposed actions and responsibilities.

10.5.1 Business Planning

Action	Responsibility
1. Need product representation on committee (operators can do more than just pay to advertise in the brochure) since they are direct beneficiaries and providers of the visitor experience along the way. Start with one operator from each of the three RTO regions.	Leichhardt Highway (39) Promotions Association Inc., Committee (LHPAC)
2. Develop a short, simple 3 year business, marketing and financing plan that links with the Drive Tourism Program to maximise benefits to Highway stakeholders.	LHPAC, with involvement of RTOs, LTOs and TQ (Drive Tourism Program)

Action	Responsibility
3. Strengthen links with the Newell Highway to link the Leichhardt with it's target markets.	Leichhardt Committee
4. Develop liaison & communication protocols and processes between the Committee and, LTOs, LGAs, RTOs, EDOs, ⁵ etc., to minimise the potential for duplication and enable a logical sharing of tasks	LHPAC, with involvement of RTOs, LTOs and TQ (Drive Tourism Program)

10.5.2 Product Development

Action	Responsibility
4. Packaging and selling local product – where local government promotes increased tourism (e.g., by means of 2-for-1 nights accommodation in caravan parks), ensure local businesses (cafes, newsagents, service stations, chemists, etc.) are invited to explore how they can link with such initiatives to expand their own markets and business. Beechworth Bakery is a good case study (it helps sell the region ⁶).	LHPAC, EDO's, LGAs, local progress associations and chambers of commerce, regional economic development groups.
5. Packaging/branding – develop a distinctive Leichhardt product, service, identity or signage (the example given at the workshop was the Leichhardt Pie - or wrapper) that could be applied or distributed along the Highway.	LHPAC, EDO's, local progress associations and chambers of commerce, regional economic development groups.
6. Promote the development of new, or upgrading of existing coffee shops to meet the contemporary tastes and preferences of travellers (including those looking for a 'real coffee').	LHPAC, EDO's, local progress associations and chambers of commerce, regional economic development groups.
7. Identify and install more rest/pullover areas (influence of forward infrastructure plans)	LHPAC, LGAs and DMR.
8. Identify scope for building passing lanes on long stretches outside of towns.	LHPAC, LGAs and DMR.
9. Facilitate (by education and encouragement) the development of a service culture and tourism entrepreneurship - encourage relevant businesses to think like a tourism operator. ⁷	LHPAC, EDO's, LTOs, RTOs, local progress associations and chambers of commerce, regional economic development groups.
10. Develop a one page touring itinerary, map and attractions / features description for each town (distributed by VICs).	LHPAC, EDO's, LTOs, RTOs, LGAs.
11. Conduct an annual, comprehensive product audit of all tourism product – then identify what might be missing or needs improvement.	LHPAC, EDO's, LTOs, RTOs, LGAs.

⁵ LTOs – local tourism associations, RTOs – regional tourism associations, LGAs – local government associations, EDOs – economic development officers, TQ – Tourism Queensland, LHPAC – Leichhardt Highway Promotions Association committee, DMR – Department of Main Roads, VICs – visitor information centres, EPA - Environmental Protection Agency, QPWS – Queensland Parks and Wildlife Service.

⁶ One of the reasons behind the success of the Beechworth Bakery in regional Victoria is that it networks and cross promotes with other businesses.

⁷ Quotes From The Beechworth Bakery Staff Handbook – “Who runs the Bakery? – The Customers”. ‘If we don't take care of our customers someone else will”

Action	Responsibility
12. Conduct an annual, comprehensive services audit (LPG, mobile coverage, RACQ stations, etc) and update the information in various highway media	LHPAC, EDO's, LTOs, RTOs, LGAs.
13. Work with EPA to determine whether some improvements to all, or a concerted focus on 1-2 undeveloped National Parks will result in achieving outcomes (better access and facilities) sooner	LHPAC, EDO's, RTOs, LGAs, EPA, QPWS.
14. Development of new, and enhancement of existing attractions.	LHPAC, EDO's, LTOs, RTOs, LGAs, local progress associations and chambers of commerce, regional economic development groups.
15. Conduct a product audit / potential assessment from the perspective of the 4WD enthusiasts market (on both public/private property).	LHPAC, RTOs, LTOs, TQ, 4WD clubs.

10.5.3 Marketing

Action	Responsibility
16. Develop the Leichhardt explorer's theme and brand (the Highway's raison d'etre?) and introduce this to all Leichhardt Highway promotional media and collateral.	LHPAC, RTOs, LTOs, TQ.
17. Monitor plans for the upcoming 2006 Year of the Outback and investigate opportunities to leverage marketing and events (along the lines of the recent, successful Ludwig Leichardt Expedition Exposition)	LHPAC, RTOs, LTOs, TQ.
18. Develop list/inventory of cooperative opportunities - resources are scarce, therefore, need to leverage with others as much as possible (working with the media and distribution channels of others)	LHPAC, RTOs, LTOs, TQ.
19. Explore how the highway can be represented and promoted consistently in all three RTO brochures / touring guides (using the Western Downs Touring Guide as a template).	LHPAC, RTOs, TQ.
20. Explore where efficiencies in representation at consumer shows can be achieved with one or all of the three RTOs.	LHPAC, RTOs, TQ.
21. Look for additional opportunities for promotion in the media and publicity in motoring publications.	LHPAC, RTOs, LTOs, TQ.
22. Intensify promotion of the Capricorn Coast at VICs between Goondiwindi and Miles to minimise leakage of touring traffic off the highway before Miles.	LHPAC, RTOs, LTOs.
23. Promote 'looping' opportunities among the highways at Goondiwindi and Rockhampton (since several routes pass through these cities, they are not in a position to favour anyone route), i.e., up one highway, back another.	LHPAC, RTOs, LTOs.
24. Suggest where visitors can stop along the way (for 2, 4, or 6 hourly rest stops or breaks, or overnight)	LHPAC, RTOs, LTOs.

Action	Responsibility
25. Develop and install interpretive and/or story panels in VICs along the highway (interpretive materials should be located at attractions and VICs, rather than on highway signage).	LHPAC, RTOs, LTOs, TQ.
26. Theme VICs along the highway to the Leichhardt story.	LHPAC, LTOs, LGAs.
27. Regular liaison with DMR (all three offices) on the rollout of the re-badging of SR39 to the A5.	LHPAC, RTOs, LTOs, DMR.
28. Where possible (on websites, flyers, publicity, etc.) update product information (new and improved product) to ensure target markets are aware of new product as it becomes available (rather than every 2 years when the brochure is reprinted).	LHPAC, RTOs, LTOs.
29. Link all relevant websites – RTOs, Leichhardt Highway, Newell Highway, LGAs, LTOs, TQ/Qld Holidays, ATDW, RACQ, Motoring Holiday Guide, etc., websites to enable visitors to find highway-related information specific to a particular site.	LHPAC, RTOs, LTOs, TQ and other website operators.
30. Investigate the possible extension of the explorer's theme (or a theme endemic to the Newell) to the Newell Highway	LHPAC, RTOs, LTOs, Newell Highway Promotion Association.
31. Explore the potential of developing a short brochure (4-8 pages) to promote the route interstate and use as an insert to motoring magazines	LHPAC, RTOs, LTOs, TQ
32. Develop the existing Leichhardt Highway website further and ensure it is linked to TQ's new motoring website	LHPAC, RTOs, LTOs, TQ
33. Ensure all maps and brochures correctly identify the Leichhardt Highway	LHPAC, RTOs, LTOs,

10.5.4 Monitoring Market Activity and Needs

Action	Responsibility
34. Collect and analyse data on the volume and characteristics of visitor traffic on the highway (North-South and South-North travel, and by month)	LHPAC, LTOs, VICs, TQ, DMR.
35. Monitor the effectiveness of various initiatives (representation at shows has been consistent, but how well has it worked in delivering visitors?). Brief surveys at key decision points and destinations with periodic reports and feedback to the Committee.	LHPAC, LTOs, RTOs, TQ and operators.
36. Periodic surveying of target markets to monitor changes in what they want.	LHPAC, RTOs, LTOs, TQ and operators.

10.6 Implementation Priorities

1. Advertise corridor in key publications (Regional Tourism brochures, Newell Highway etc.).
2. Develop a short brochure to promote the route in new markets.

3. Develop an interpretation template and install interpretation panels in Queensland and New South Wales.
4. Develop web site, linkages and PR stories to promote the benefits of the corridor.
5. Introduce road safety initiatives with Queensland Transport.
6. Align with State Road Strategy initiatives including alpha numeric signage, drive market research and drive marketing programs developed by Tourism Queensland etc.

ATTACHMENTS

Attachment 1: Stakeholder List

Group	Organisation	Title	First Name	Last Name
Route Committee	Leichhardt Highway Steering Committee	Ms	Mary	Carroll
RTOs	Gladstone Area Promotion and Development	Mr	Daniel	Rochford
	Toowoomba and the Golden West	Ms	Krista	Hauritz
	Capricorn Tourism	Mr	Alan	Chamberlain
DMRD	Border	Mr	Ian	Darnell
	South Western	Mr	Murry	Peacock
	Central	Mr	Greg	McTier
LGA	Waggamba Shire Council	Councillor	Tom	Woods
	Tara Shire Council	Councillor	Phil	Bougoure
	Murilla Shire Council	Councillor	Roderick	Gilmour
	Taroom Shire Council	Councillor	John	Jennings
	Banana Shire Council	Councillor	Glenn	Churchill
	Mount Morgan Shire Council	Councillor	Stan	Lean
	Fitzroy Shire Council	Councillor	John	Hopkins
	Rockhampton City Council	Councillor	Margaret	Strelow
	Livingstone Shire Council	Councillor	Mary	Carroll
VICs	Goondiwindi Waggamba Visitor Information Centre	Ms	Tess	Williams
	Miles & District Historical Society Inc.	Ms	Hilda	Heffernan
	Capricorn Information Centre	Ms	Amber	Rogers
	Rockhampton Tourist & Business Information Centre	Ms	Barbara	Harwood
	Customs House, Rockhampton	Mrs	Ngaire	Merrifield
Other	DSD – Smart State Policy and Planning		David	Stubbins

Attachment 2: Route Steering Committee Brief Questionnaire



DRIVE TOURISM PROGRAM – STAGE TWO

LEICHHARDT HIGHWAY

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 the existing Route Steering Committees and other partners to identify the potential of each route, develop a list of priorities, 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.

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	<ul style="list-style-type: none">- Initial contact with the Steering Committee will be made.- Identification of key stakeholders.- Preparation of a draft Corridor questionnaire.	September / October

Key Steps	Community Consultation	Timeline
2. Context Analysis / Where are we now?	- At this stage the project team will work with the Committee to determine what initiatives have been undertaken to promote the Leichhardt Highway. This will involve an examination of the target market for each 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 to the Committee to assist in this regard.	October
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 the Committee for feedback and comment.	October
4. Workshops	Visioning Workshop	November / December
5. Draft Report		December
6. Final Report		December / January

WORKSHOP

At the Leichhardt Highway's next meeting, the Project Team would like to conduct a visioning workshop for the Leichhardt Highway. At this workshop, the findings of the desktop review will be presented and the positioning and future opportunities for the route will be discussed with the Committee.

Most of this information will already have been discussed and presented to the Committee as part of stages 1, 2 and 3.

At the conclusion of this workshop, we hope to have established, with your help and input, a clear vision for the Leichhardt Highway. The workshop will also provide a forum to discuss the strategic priorities and role of the Drive Tourism Program.

Prior to this workshop, it would be helpful if the committee can start thinking about the following issues:

- The current drive market using the corridor
- Target or future drive markets
- The route's unique selling points
- Current stage of development eg. soft and hard infrastructure
- Market and development opportunities
- Current management and marketing arrangements
- Current visitor information (brochures, maps, etc.)

- Current level of stakeholder engagement

CALL FOR STEERING COMMITTEE AND INDUSTRY FEEDBACK

We need your support in providing up to date information on the Leichhardt Highway. 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: Stakeholder Questionnaire



DRIVE TOURISM PROGRAM – STAGE TWO

LEICHHARDT HIGHWAY

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.

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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

Past research undertaken by Tourism Queensland indicates that visitors on the Leichhardt Highway had the following attributes:

- Approximately **97% of those using the Leichhardt Highway were domestic visitors**, with 32% from Victoria, 24% from Queensland and 20% from New South Wales. In addition to having the highest proportion of domestic visitors, the Leichhardt Highway also had the highest proportion of visitors originating from Victoria (compared to the other strategic routes).
- 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** (77%).
- A large proportion of those using the Leichhardt Highway described their overall trip as “**touring around**” (71%) rather than “driving straight to a main destination and back”.
- Almost two-thirds of those using the Leichhardt Highway **stayed overnight at 11 or more locations** during their overall trip (63%).
- Of the nine strategic Queensland routes, the Leichhardt Highway had the highest proportion of travellers **aged over 55 years** (67%).
- The **main sources of information** for travellers using the Leichhardt Highway were: previous knowledge or experience of travel in Queensland, maps and brochures obtained from motoring organisations, caravan/camping shows and caravan park associations/clubs.
- Almost two-thirds of those using the Leichhardt Highway **obtained information from a Queensland Visitor Information Centre** whilst on their trip (61%).
- Around **60% 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 41% of Leichhardt Highway travellers making **unplanned overnight stops** during their trip.
- Three-quarters of respondents in the Queensland study were spending **1 month or more away from home** (75%).
- The Leichhardt Highway had the highest proportion of travellers who had **toured around Queensland by motor vehicle previously in the last three years** (78%).
- The majority were **travelling as an adult couple** (73% each route) and around one in five were travelling as a family group (17% Leichhardt Hwy).
- Over half of those using the Leichhardt Highway described their household as ‘**later family with no children living at home**’, with the same proportion stating the work status as ‘**retired**’ (57% each).

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 largest in size).

- 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 Leichhardt Highway 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 main weakness)

- 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 Leichhardt Highway road network are as follows:

- Single sealed carriageway (bitumen), two lanes.
- Seal width along the majority of the route ranges between 7.01m and 9.1m, although in some sections seal width ranges between 5.81m and 6.4m.
- The percentage of **heavy vehicles** using the route ranges between **20% and 30%** for the Goondiwindi to Dululu section.

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 Leichhardt Highway over the next two years?

c) In your opinion what action needs to be undertaken by the Corridor Committee 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:

- Towns along the route boast several **historical/heritage sites** and a small section of the route was traversed by the explorer after which it was named in 1844.
- A range of **National Parks** and scenic spots including Isla Gorge and Expedition National Parks.
- Potential visitors could be encouraged to use the Leichhardt Highway as an **alternative route** to the Central Queensland region, instead of the Bruce Highway/Pacific Coast Way. In this sense, the Leichhardt Highway will be competing with the Country Way.

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

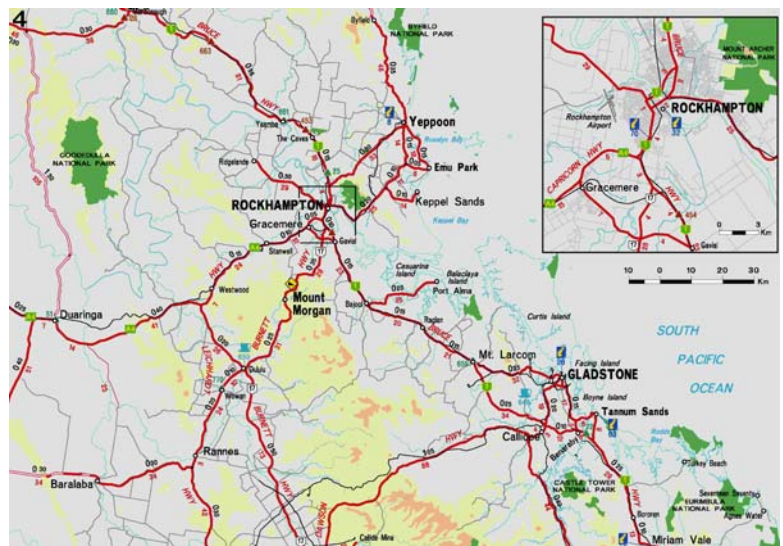
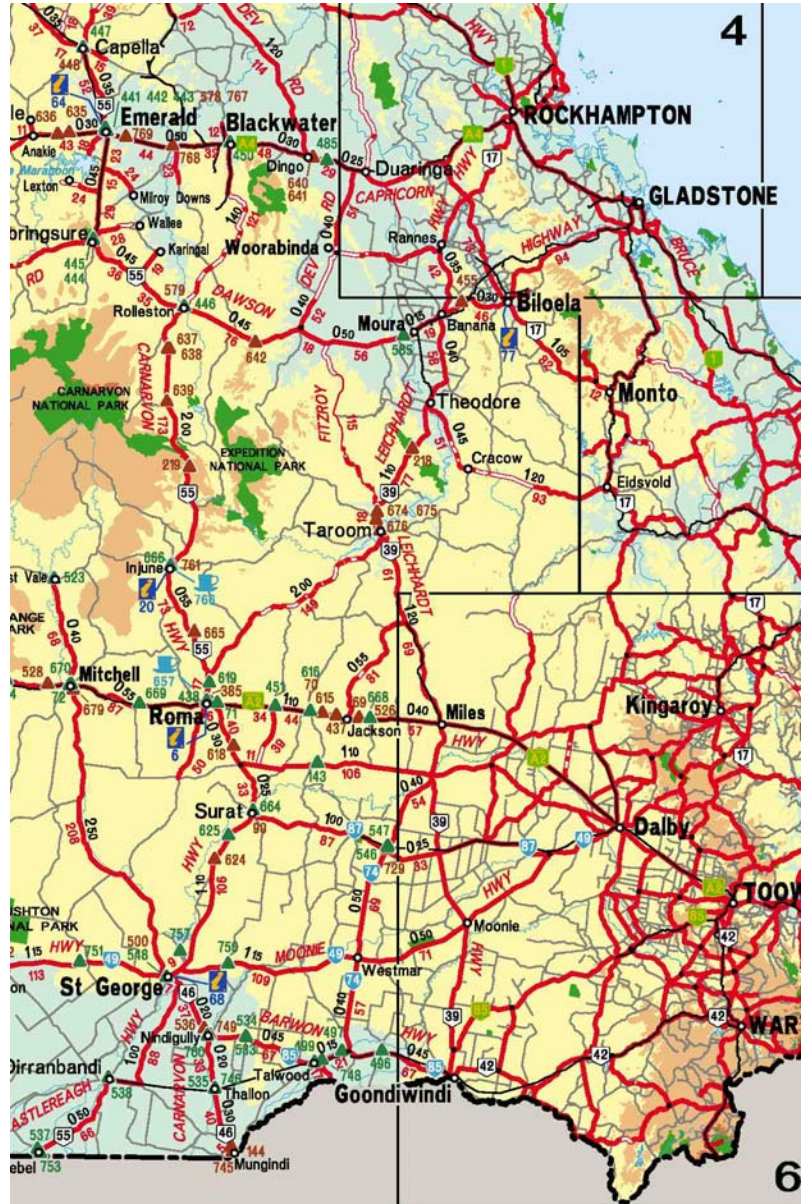
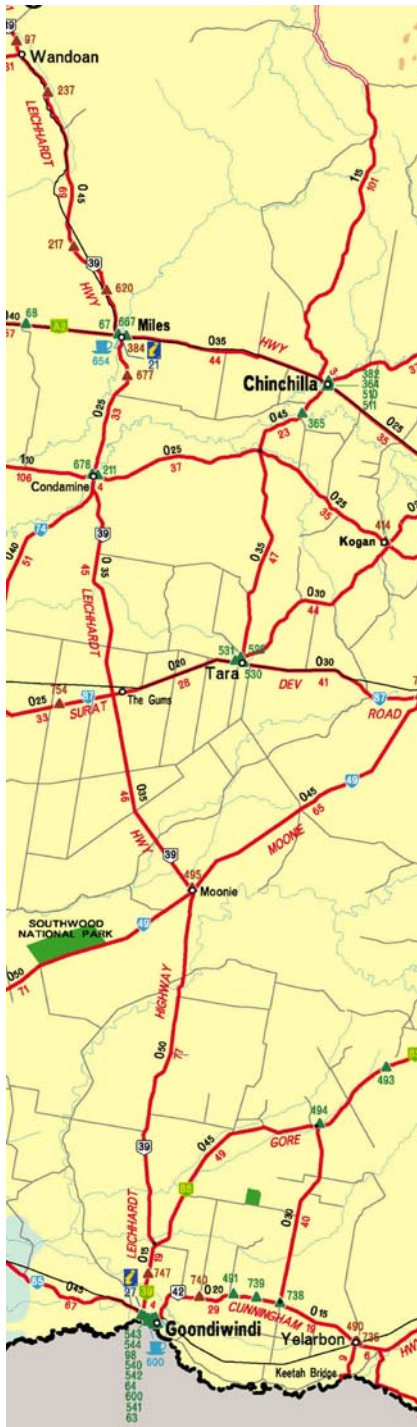
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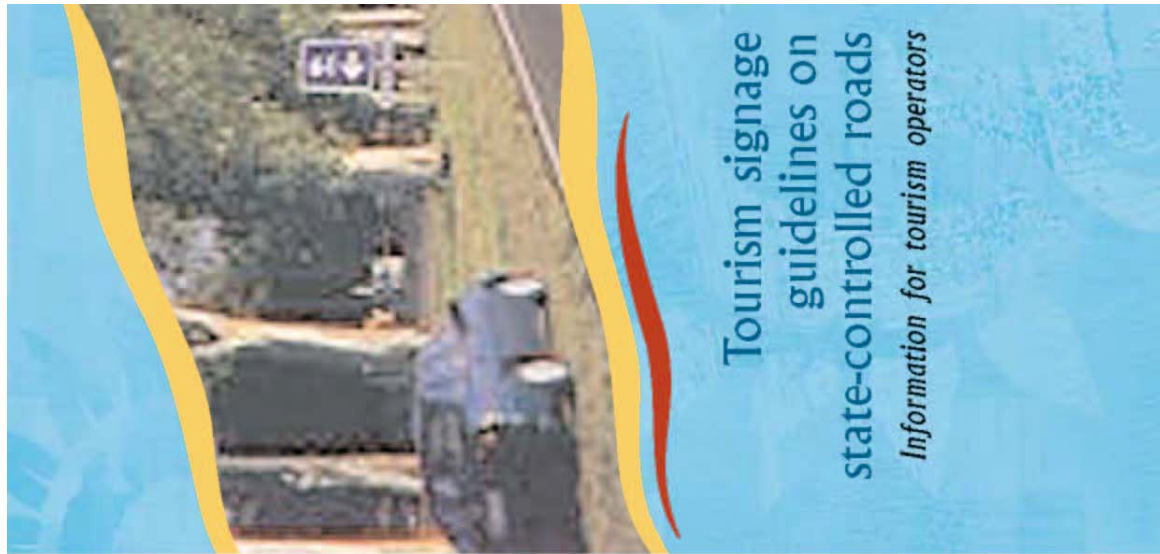
Attachment 4: Map Of Road Side Rest Areas

LEGEND

- Travelling Times in Hours and Minutes
- Distances in Kilometres
- Driver Rest Stop, Service Centre
- Accredited Information Centre
- Motorist Rest Area, Heavy Vehicle Rest Area
- Sleep Descent/Ascent
- Exit Ramps Northbound/Southbound
- Route Marking Signs
- National Highway
- Motorway
- National Route
- Metrod
- State Route
- State Controlled Roads
- Bitumen Road
- Gravel Road
- Formed Road
- Local Authority Road
- Railway
- National Park
- Topography (metres)
 - 0 - 200
 - 200 - 500
 - 500 - 1000
 - 1000 - 1500
 - 1500 - 2000



Attachment 5: Road Signage Brochure



HOW DO I GET MORE INFORMATION?

For further information contact your local Main Roads District Office

North Queensland Region

Peninsula District (Cairns) 4050 5444
 Northern District (Townsville) 4720 7200
 North Western District (Clonoury) 4769 3200

Central Queensland Region

Mackay District 4951 8555
 Central District (Rockhampton) 4931 1500
 Central Highlands District (Emerald) 4983 8700
 Central Western District (Barcaldine) 4651 2777

Southern Queensland Region

Wide Bay District (Bundaberg) 4154 0200
 South Western District (Roma) 4622 9511
 Southern District (Toowoomba) 4639 0777
 Border District (Warwick) 4661 6333

South East Queensland Region

North Coast Hinterland District (Gympie) 5482 0333
 Metropolitan District (Brisbane) 3834 8344
 South Coast Hinterland District (Nerang) 5583 8111



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STATE THEMED ROUTES

Themed routes provide an additional level of information to the motorist because of their tourism opportunities, scenic highlights and areas of community and historical significance. These routes typically link sites, attractions and destinations of tourism significance and promote a tourism related driving experience as distinct from promoting a destination.

Ten strategic tourism routes have been identified in Queensland with the potential to be 'themed'. These routes are at varying stages of development and will be progressed through a road corridor management planning process for each route.

A Corridor Management Plan establishes a framework for integrated development and ongoing management of an identified route. Support from relevant local government and tourism organisations is essential to the success of these routes. Government and industry consultation will occur in the drafting of each plan.

Themed signage on these routes will be one element considered in the Corridor Management Plan.

For further information on State Themed Routes email: mark.olsen@mq.com.au to receive a copy of the fact sheet.

WHAT ARE THE TYPES OF SIGNS?

There are three major types of signs used by visitors to find tourist attractions and services in Queensland

1. Guide Signs (white lettering on green background)

These are the primary means of directional signage for visitors to towns and cities. Most include route numbers that assist in guiding visitors through the road network. The Department of Main Roads provides and pays for these signs.



2. Tourist Attraction Signs (white lettering on brown background)

These indicate features and attractions (commercial and non-commercial) of significant recreation and cultural interest according to Main Roads and the District Tourism Signage Committee. They may also incorporate Australian Standards service symbols or other approved tourist symbols. Tourist attraction signs for commercial facilities are paid for by the applicant and are approved through the process outlined opposite.



3. Service Signs (white lettering on blue background)

These signs guide motorists to community and tourist service facilities including rest areas, information centres, restaurants and accommodation. Service signs may use words, approved symbols or a combination of both. Main Roads usually pays for generic service signs (eg rest area, toilets), however, the applicant pays for the cost of signing to commercial services (eg accommodation, restaurants, service stations). The signs are approved through the process opposite.



Visitor Information Signs



This new, trademarked, national symbol denotes genuine, quality visitor information centres that have met specified industry standards. Queensland visitor information centres must be accredited under the guidelines of the Queensland Visitor Information Centre Signage Policy to be authorised to use the new 'i' sign. Further information on the accreditation program can be obtained from Tourism Queensland on (07) 3535 5442.



Denotes general information services or facilities.

HOW ARE SIGNS USED?

Tourist attraction and service signs are designed in a range of standard forms to suit each location. Where required, the appropriate combination of signs would be determined by Main Roads technical officers as part of the application process. Examples of sign designs are provided below.

A. Gateway Signs



D. Reassurance Signs



B. Advance Signs



E. Position Signs



C. Intersection Signs



F. Route Markers



HOW ARE APPLICATIONS ASSESSED?

Tourist Attraction and Service Signage

Applications are reviewed by Main Roads district offices to determine whether they are acceptable on the grounds of road safety and tourism merit.

The following factors are considered during the assessment of applications:

- i General** Whether the sign would detract from the effectiveness of other road signs
- ii Proliferation** Generally restricted to five sign messages in any one location
- iii Sign information** Relevance of content
- iv Distance limit** Generally limited to facilities within 10km of the proposed sign
- v Tourism merit** A subjective assessment that takes into account the regional significance of the facility.

If the application is acceptable based on road and traffic considerations, and doubt exists as to tourism merit, the application may be referred to the relevant District Tourism Signage Committee for advice and recommendation.

District Tourism Signage Committees are regionally based and include representatives from the Main Roads district office, local/regional tourism associations, local government and Royal Automobile Club of Queensland.

The Signage Committee considers the tourism merits of signage applications, taking into consideration the following:

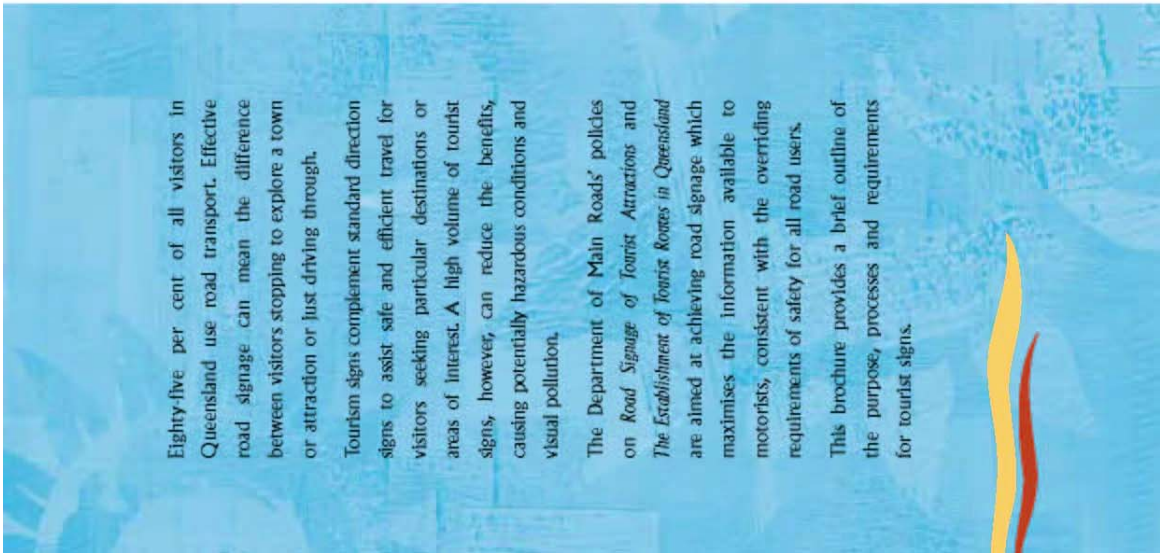
- i Tourist recognition** It must be a recognised tourist facility
- ii Patronage** The minimum level of visitor patronage considered appropriate will depend on the type and location of facilities
- iii Distance** Of the facility from the proposed road sign
- iv Facilities** Criteria include requirements such as opening times, parking access, local permits and tourism focus.

Note: Criteria can vary depending upon prevailing conditions. Contact your local Main Roads District Office for detailed assessment criteria.

Tourist Drives

These are local or district tourism links or routes which can be named and/or numbered. A tourist drive may be established to provide a scenic drive or form a route connecting a number of tourist attractions. They should form a circuit, starting and finishing on a single route.

The assessment of tourist drives is conducted in line with other tourist sign assessments and includes review of the technical and tourism merits of the application. Applications are assessed by the Main Roads district office and the District Tourism Signage Committee using criteria outlined in Part Six of the Queensland Manual of Uniform Traffic Control Devices. A copy of these criteria can be obtained from your local Main Roads office.



WHAT IS THE ROLE OF TOURIST ATTRACTION AND SERVICES SIGNAGE?

Roadside tourist attraction and service signs are the final link between the tourism operator and the consumer. They reinforce locations and aid safe and efficient travel.

Tourist signs are not for promotional purposes - they are there to help visitors who are already aware through brochures and advertising, to physically locate the business, attraction or town.

It is important to note that any application for tourist signage will be considered on the basis that it is consistent with the requirements of road safety and it does not create visual pollution.

Choosing a suitable location that is visible and will capture trade should be a primary consideration during business planning. Roadside signage can not compensate for a poorly located business.

HOW DO I MAXIMISE THE EFFECTIVENESS OF A SIGN?

Extensive research has determined a range of characteristics that can optimise motorist comprehension of road signage. The best letter size, spacing and the number of words and lines on a sign will vary depending on traffic speeds and locations. The size, style and wording of your sign will be determined by these factors.

Greater benefits can be gained for both the tourism industry and the Department of Main Roads if signage is part of an operator's marketing plan which is integrated into the local, regional and state network.

WHO PAYS FOR SIGNS AND WHO MAINTAINS THEM?

The design, manufacture, installation and maintenance of signs on state-controlled roads is usually managed by the Department of Main Roads and only a Main Roads approved contractor can undertake installation and maintenance of signs.

The applicant is responsible for the cost of the sign (which includes manufacture, installation and maintenance) however, all road signs remain the property of the Department of Main Roads. Signs are made of high quality reflective material that is designed to last at least seven years. The maintenance charge is equal to the cost of design, supply and installation and covers routine maintenance and minor repairs for the seven year period, for which the signs are typically approved (the maintenance fee excludes major damage or total destruction). The Department of Main Roads requires payment prior to the manufacture and installation of the sign.

The tourist facility must maintain the services and attributes detailed in its application to ensure the continued existence of the sign. Main Roads may require the sign be removed at the applicant's expense where it deems the tourism merits of the business are not sustained.

HOW DO I APPLY?

Kits including an application form, policy information and guidelines are available from the Department of Main Roads district offices.

Attachment 6: How do we compare?

	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	Yeppoon/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, heritage, undeveloped National Parks	North Queensland / Central Queensland Carnarvon Gorge Gemfields	Carnarvon Gorge 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 - DMR rebadging sections to A5 early in 2005	- Improve service / tourism signage - Small towns service infrastructure e.g. improve interpretation in VICs - Caravan / camping market	- Emerald service hub - Support existing site regional signage strategy. - 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