

Resident Travel Motives in a Small Island State

The Influence of Visiting Friends and Relatives on Travel by Tasmanian Residents

By

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Table of Contents

List of Tables.....	i
List of Figures	ii
Declaration	iii
Acknowledgments.....	iv
Abstract	v
 CHAPTER 1 INTRODUCTION	1
1.1 Background.....	1
1.2 Research Objectives	4
1.3 Research Method.....	4
1.4 Chapter Outline	5
1.5 Limitations	5
 CHAPTER 2 LITERATURE REVIEW	6
2.1 Tourism in Small Island States.....	6
2.2 The Relationship between Tourism and Migration.....	9
2.3 Visiting Friends and Relatives	11
2.4 Destination Choice and Travel Motivations.....	14
2.5 Conclusion	16
 CHAPTER 3 AUSTRALIA'S ISLAND STATE	18
3.1 The Economic Significance of Tourism in Tasmania	18
3.2 Tasmania's Travel Markets.....	20
3.3 Marketing Travel to Tasmanian Residents.....	22
 CHAPTER 4 METHODOLOGY	24
4.1 Research Design.....	24
4.2 Standardised Focus Groups.....	27
4.3 Group Composition.....	28
4.4 The Process	29
4.5 Limitations	33
 CHAPTER 5 RESEARCH FINDINGS.....	34
5.1 Motives for Travel.....	34
5.2 Reasons for Selecting a Holiday in Tasmania.....	37
5.3 Differences Between Visitor Type and Travel Motives.....	39
5.4 Perceptions of Tasmania	41
5.5 Summary of Findings.....	43
 CHAPTER 6 DISCUSSION.....	45
6.1 The Travel Motives of Tasmanian Residents.....	45
6.2 The Influence of Visiting Friends and Relatives	47
6.3 Perceptions of Islandness	48
 CHAPTER 7 CONCLUSIONS AND OPPORTUNITIES FOR FURTHER RESEARCH	51

REFERENCES55

Appendix I Focus Group Structure..... 61

Appendix II Confidentiality Agreement 63

Appendix III Participant Recruitment Requirements..... 64

Appendix IV Complete Set of Transcripts 67

Appendix V Participant Questionnaire 102

List of Tables

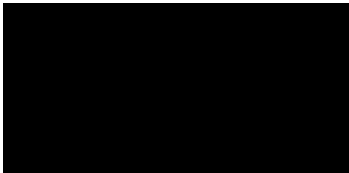
Table	Page
1. Visits to Tasmania by Trip Purpose 1994 – 1998	19
2. Out-of-Tasmania Travel Patterns 1992 – 1997	20
3. Travel Motives Associated with Tasmania and Other Destinations	36
4. Key Words Used to Describe Tasmania	43

List of Figures

Figure	Page
1. The Association between Destination, Visitor Type and Travel Motive	40

Declaration

I declare that the work presented here has not been submitted for any other award, and that the sources of material have been acknowledged in the text.



Carmel Goulding
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On a personal note, I am one of the many who have departed Tasmania seeking the metropolitan lifestyle offered by the “mainland” and this research is in part an expression of my love for Tasmania, which I still consider to be my island home. As a frequent visitor to the State, I have observed many changes since my departure but the beauty of the “Mountain”, the lure of the water, and the family and friends that remain will always attract me back. I gladly accept the role of a VFR visitor for life!

Abstract

This study is a qualitative evaluation of the holiday activities and attitudes of Tasmanian residents. In particular, the study evaluates the influence of visits by friends and relatives (VFR) on intra-state and out-of-state travel decisions by Tasmanian residents. The study is intended to clarify basic concepts, to identify variables, and to identify future research opportunities. The framework of grounded theory is used to generate observations and identify the themes that characterise the travel motivations of Tasmanian residents including their perceptions and awareness of local tourism product. Focus groups are used to explore the travel motivations of Tasmanian residents and the perceptions that they hold of their state as a travel destination.

As is the case for many small island states, Tasmania's economy relies on the continued development of a viable and sustainable tourism industry. Estimates for 1998 show that the State received \$551.8 million in earnings from tourism and that 10% of the local working population was employed in this sector. Considering Tasmania's heavy reliance upon tourism, it is important that the factors which influence the State's travel markets are monitored on a regular basis. One key issue for the development of Tasmanian tourism is the continued growth in out-of-state travel by the island's resident population. Expenditure on out-of-state travel is now exceeding the spending of comparable tourist arrivals to Tasmania. This is recognised as a serious threat to the state's tourism development.

The relationship between population decline and the subsequent development of travel patterns is noteworthy. Population outflows from Tasmania are high and by 2051 the State's population is forecast to decline to half its present level. Historically, outward migration has played a significant influence on a population's propensity to travel. The literature reveals a relationship between migration and subsequent tourism activities particularly where migrants return to visit their friends and relatives who stayed behind. Given the high outward migration characteristic of small island economies such as Tasmania, it is likely that visits to friends and relatives will influence intra-state and out-of-state travel by island residents. Despite the likelihood of this relationship, little research has been undertaken into the travel motivations of island state residents.

It is hoped that the present research will assist Tourism Tasmania in the development of strategies aimed at stimulating intra-state travel, subsequently increasing the economic impact of travel and tourism. In addition, the key findings of this exploratory study should contribute to a better understanding of the influence of 'islandness' on the holiday preferences of island state residents and in particular, the influence of visiting friends and relatives. The study concludes that further research should be undertaken into the relationship between migration and tourist outflows, with particular reference to visiting friends and relatives travel and its influence on small island states.

Key words: Tasmania, Small Island State Tourism, Travel Motives, Visiting Friends and Relatives, Intra-state Travel

Chapter 1 Introduction

1.1 Background

Tourism is often viewed as a catalyst for economic development. This is particularly true for small island states which need to diversify from previous dependency on primary commodity exports. The smallness of such island states creates a number of unique development constraints. Small resident populations and low per capita incomes lead many islands to be reliant on inbound travel markets as these factors reduce the net demand for intra-state travel. The smallness of islands also leads to both a dependency on foreign investment and to a high degree of government involvement in tourism development. Smallness may also be accompanied by a paucity of natural and cultural resources. The isolation of many small island states constitutes another constraint to the development of tourism in particular. In sum, small island tourism is characterised by a restricted domestic travel market; a high level of government involvement; limited social and cultural resources; and a high degree of foreign investment.

Tasmania, Australia's only island state, provides a point in case of small state tourism. There are three aspects of the Tasmanian situation that make it ideal for a study of small island tourism. Firstly, Tasmania is small both in geographic area (68,050 km²) and in population size (473,500). While Tasmania's resource base is broad, the state is a highly subsidised economy which contributes only 2.1% to Australia's national account. The level of government support for the resource and service sector is high and this extends to tourism, with the state actively involved in destination marketing, transport provision, and retail and wholesale travel distribution.

Secondly, Tasmania is a vulnerable island economy and as is the case in many small island states, population outflows are high. The state's population is forecast to decline to as low as half its current level by 2051, with outward migration to other Australian states playing a significant role in the predicted decline. The likely impact of the state's predicted population change on economic development and service provision is, however, yet to be thoroughly examined.

Finally, tourism is a key industry for Tasmania, with job creation and income generation contributing positively to the state's economic development. Government and private sector promotions characterise Tasmania as a place of escape offering diverse natural assets, and quality food and wine. Tourism Tasmania is the principal destination-marketing organisation for Tasmania. State-funded retail travel centres are located in each of the state's key domestic markets and subsidised wholesale distribution is supported through *Tasmania's Temptations* which attempts to stimulate holiday sales by developing Tasmanian holiday packages and products, and actively promoting these packages throughout Australia and New Zealand. The State's active role in tourism development has facilitated a fairly steady growth in inbound travel. Growth in out-of-state travel expenditure by the island's resident population has, however, exceeded the spending of comparable tourist arrivals to Tasmania, thus leading to a tourism deficit.

Considering the trend towards out-of-state travel, Tasmania's resident travel market has emerged as a key area of research for Tourism Tasmania. The factors which influence the state's resident travel market are not thoroughly understood. Tourism Tasmania is committed to stimulating intra-state travel and with a view to identifying

the primary reasons for travel by Tasmanian residents, provided funding for the present research.

The influence of the state's island status is critical in understanding Tasmania's resident travel market. Generally, islands are viewed as attractive tourism destinations, with the image of island life, the diverse landscape and the difference of climate being major attractions. The concept of 'islandness' has, however, a variety of manifestations. The literature reveals that the image of islands as "separate" can act as a barrier to potential travellers, with market demand constrained by perceptions of isolation, increased travel costs and choice of product. It is also likely that separation from the "mainland" influences the travel attitudes of small island state residents. There is, however, limited academic inquiry into the relationship between resident perceptions of 'islandness' and the influence that this may have on travel behaviour.

Regional tourism trends are also an important consideration in understanding the motives for travel by Tasmanian residents. Evidence is emerging of a relationship between migration-induced changes to regional population and the subsequent development of travel patterns related to visits to the homes of friends and relatives. This relationship between population change and growing visiting friends and relatives (VFR) visitor numbers has significant implications for planning and promotion in tourism regions such as Tasmania. The significance of the relationship extends to the influence of VFR on resident travel patterns.

Given that small island economies are characterised by a high level of outward migration, it is likely that visits to friends and relatives are a potential influence on

both the intra-state and out-of-state travel behaviour of island residents. Despite the high probability of such a relationship, little research has been undertaken into the travel motivations of island state residents. In the case of Tasmania, the influence of VFR travel on residents is potentially twofold. Tasmania's high level of outward migration could stimulate out-of-state travel, with residents travelling to visit friends and relatives living elsewhere. VFR travel to Tasmania may also influence intra-state travel, with returning friends and relatives encouraging shared guest-resident travel activity.

1.2 Research Objectives

The present research sets out to explore the travel motivations and perceptions of Tasmania's resident population. In order to improve our understanding of the relationship between population change and VFR travel, it endeavours to understand the influence of visits to friends and relatives (VFR) on intra-state and out-of-state travel by Tasmanian residents. It is proposed that VFR tourism is a key influence on the travel patterns of Tasmanians, and that this influence extends across out-of-state and intra-state travel. To assess the validity of these observations, the following research questions are proposed:

- What are the main factors which prompt Tasmanians to travel?
- What are the different motives in the case of intra-state and out-of-state travel?
- What is the influence of visiting friends and relatives on intra-state travel?
- What is the influence of visits to friends and relatives on out-of-state travel?
- How do residents perceive Tasmania as a travel destination and a place to live?

1.3 Research Method

Given the paucity of research into the motives and perceptions of island state residents, the present study is confined to a qualitative exploration aimed at clarifying basic concepts, identifying variables, and future research opportunities. Focus groups

are used to explore the travel motives of Tasmanian residents and the perceptions that they hold of their state as a travel destination and as a place to live. Secondary data from the Tasmanian Visitor Survey are analysed to assess the magnitude of out-of-state travel by Tasmanians. Data from Tourism Tasmania's Intrastate Travel Survey (1996) are used to assess the magnitude of the Tasmanian intra-state market. In addition to facilitating funding for the research, the author's previous employment with Tourism Tasmania provided a useful background to the study.

1.4 Chapter Outline

The theoretical principles which emerge from the literature and the key research questions are identified in chapter 2. Chapter 3 provides an overview of tourism development in Tasmania and includes an analysis of inbound and outbound travel patterns. The research design is detailed in chapter 4 and the data are analysed in chapter 5. Chapter 6 provides a discussion of the key research findings. The final chapter provides an overview of the implications of the research for Tasmanian tourism and identifies opportunities for further research.

1.5 Limitations

The exploratory nature of the present research limits the ability to generalise the findings to other small island destinations. The study does, however, provide a basis for further investigation of the travel motives and perceptions of small island state residents. In addition, the outcomes of the research will enhance the understanding of the state's resident travel market by Tourism Tasmania and the tourism industry. This improved understanding will aid the development of marketing programs aimed at stimulating intra-state travel.

Chapter 2 Literature Review

This chapter provides an overview of the relevant literature and covers the fields of small island states, migration and visiting friends and relatives, and travel motives. Research into tourism in small islands is generally well developed and travel motives and destination choice have also received considerable attention. The study of the relationship between migration and tourism visitation patterns is less developed but plays an important role in the present study.

2.1 Tourism in Small Island States

The vulnerability of small island states to the impact of tourism has been the subject of extensive academic inquiry (Archer 1989; Conlin & Baum 1995; Briguglio, Archer, Jafari & Wall 1996). Whilst noting the diversity of islands in terms of geography, population density and size, climate, and environmental, social and culture conditions, the literature reveals that isolation, economic fragility and high level dependency are key features of small island state tourism (Wilkinson 1987, Butler 1993; Liu & Jenkins 1996, Harrison 1996).

Tourism development in small island states offers the prospect of substantial economic gain, and for many, economic diversification has become necessary in order to break away from dependency on primary commodity exports. The positive economic impacts of tourism are, however, often negated in small island states by the dominant influence of multinational companies, high leakage rates of foreign exchange earnings, low levels of local employment, and fluctuating visitor patterns (Lockhart & Drakakis-Smith 1997). The negative social and environmental impacts of tourism development are also great, with the commercialisation of culture, and the erosion of cultural and environmental values identified as potential negative

consequences for small island tourism destinations (Wilkinson 1989). According to Butler (1996) addressing sustainable tourism in small island states is complex. The problems identified include the limited size of the local market, the small-scale nature of most tourism activities, and the relatively poor communications and transportation links. In sum, the potential for tourism to deliver positive economic outcomes for small island states is constrained by fluctuating visitor numbers, dependency on foreign investment and high population outflows.

Population outflows characterise small island states. Such losses are typically related to labour-led migration and the search for the diverse amenities offered by metropolitan centres, and often result in a reliance on imported labour to service the growth of inbound tourism (Butler 1993). Bertram and Watter's (1985) MIRAB model of social change, attempts to explain the functioning of small island microstates, with migration (Mi), remittances (R), aid (A), finance (F) and bureaucracy (B), identified as the set of factors which have dominated island economies. Against a background of reliance on export commodities, MIRAB states are typically highly subsidised economies, with dependency on foreign aid enabling the development of large and expensive bureaucracies. In a rework of the MIRAB model, Guthunz and von Krosigks (1996) suggest that tourism as an employment generator reduces the migratory outflows from islands and consequently provides a substitute for emigration. However, dependence on aid remains high and private investment in tourism projects is heavily reliant on subsidised infrastructure. As a constituent state of a developed federal state, Tasmania is in a different position to sovereign developing countries. Nevertheless, the MIRAB model is a useful approach to economic development.

For many islands, fluctuating and unpredictable visitor patterns are compounded by an over-reliance on one or two major sources of visitors. In lessening the impact of fluctuating and restricted inbound markets in island and peripheral economies, the intra-state travel market provides a potentially valuable source of income. Domestic travel is, however, limited by the economic and social characteristics of the residential population. A healthy domestic sector requires a substantial population base and a sufficient proportion of the population who have the income and leisure time to travel.

While acknowledging the constraints on domestic travel demand, the benefits of intra-state travel are potentially significant. They include a more buoyant tourism industry and possibly a heightened sense of identity amongst the resident population.

Moreover, the compactness of small islands generates ease of movement, and may stimulate intra-state travel activity. Consideration of the social and economic value of intra-state travel in small island states offers the prospect of future research.

A number of studies have attempted to understand the attitude of island state residents to tourism development (Rajotte 1980; Sofield 1996), though few have focused on resident travel motives and perceptions. Butler (1993) and King (1997) have identified the attractiveness of islands as size, climate and culture, and an image of 'separateness'. The concept of an island's separateness has been extended by Baum (1997) who suggests that perceptions of 'islandness' may act as a barrier to potential travel markets, with additional travel costs, time and flexibility of product choice identified as key considerations in the consumer decision-making process. For residents of small island states, separation from the "mainland" may be evident through increased cost of living, limited access to employment and perceptions of

cultural difference. There has however, been limited academic inquiry into resident perceptions of 'islandness' and the influence that this may have on travel behaviour.

The literature reveals the vulnerability of small island states. Whilst tourism offers the opportunity for economic diversification, it may legitimately be asked 'at what cost?' It may be concluded that population shifts and structural change are clearly identified as the key factors driving small island economies, yet the conceptualisation of the tourism-migration relationship as it relates to small island states is still in its infancy.

2.2 The Relationship between Tourism and Migration

The relationship between tourism and migration is an emerging area of research. A review of the tourism and migration literature reveals that tourist flows are generally viewed as highly dependent on social structure, demographic patterns and population shifts (Dywer, Burnley, Forsyth & Murphy 1993; Komilis 1994). However, divergent viewpoints are evident in the conceptualisation of the tourism-migration relationship.

Boroć (1996) theorises that all tourists are migrants, differentiated from the mode of production through non-participation in the local labour market. By providing leisure services to the traveller, the tourism industry represents 'the institutional channel of leisure connecting the flow of commodities, money, capital, information and people' (p. 9). Williams and Hall (1999) identify the potential of tourist flows in generating labour and consumption led migration. However, they stress that in attempting to understand the relationship between migration and tourism systems, a clear distinction needs to be made between production and consumption. Production linkages relate to labour migration, with labour to provide services at points of large volume tourism.

Consumption linkages are based on changes in leisure time, motivation and property relationships.

Inter-regional migration is an important influence on Australia's regional framework. For many areas, population decline remains a major challenge and has been exacerbated by industry restructuring. In a study of inter-regional migration in Australia, Newtown and Bell (1996), suggest that the motives of 'movers' are related to consumption as much as to the production. An ageing population, early retirement, rising affluence, and an increased emphasis on leisure pursuits, are key factors in the increasing level of inter-regional migration in Australia. In due course employment has been generated in regional areas to service, '... the expanding leisure industries which have been the major pull factor attracting other groups and stimulating migration from cities ...' (Newtown & Bell 1996, p.7).

Tourism in Australia is dependent on social structures including the migratory patterns of a particular population and the extent to which it generates visits to friends and relatives (McKenzie 1994; Nguyen 1996). Most of the literature on the migration-tourism relationship has examined travel patterns between countries. One of the few studies on inter-regional migration and the subsequent development of tourism patterns notes a relationship between regional population growth and the VFR market (Carlsen 1996). The author also suggests that the relationship between population decline and the subsequent development of tourism patterns, specifically VFR, offers an opportunity for further research.

Regional development is a significant policy issue in Australia. The marked differences in economic performance between regional areas and the uneven

distribution of the country's population has given rise to a series of policy initiatives aimed at encouraging regional and rural development. As a consequence, regional tourism has received increased attention and domestic tourism has been identified as a significant contributor to regional development. However, the potential linkage between population change and the subsequent development of tourism patterns in regional areas has received limited policy consideration by state and territory marketing authorities. Typically, state and territory governments in Australia focus on influencing the domestic holiday market, with VFR tourism viewed as both difficult to stimulate and as a secondary contributor to economic growth. VFR tourism is, however, less susceptible to market fluctuations and has continued to grow through times of economic downturn (Hall 1998). Furthermore, VFR tourism requires less infrastructural investment. For many regions its net benefits can be more direct than is the case with other forms of tourism.

2.3 Visiting Friends and Relatives

Though visiting friends and relatives is widely recognised as a distinct market segment, the VFR market is overlooked by many tourism practitioners and largely ignored by the marketing activities of government tourist offices (Jackson 1990; Morrison & O'Leary 1995; Hay 1996). In commenting on the future research direction for VFR tourism and noting the increasing difficulty in distinguishing between travel motivations and practices, King (1996) suggests that the primary and secondary reasons for travel would benefit from further research. Seaton (1996) contends that the underestimation of VFR travel by destinations is linked partly to the 'hybrid' nature of travel where visitors may mix business, pleasure and visiting friends and relative. There is however, emerging recognition of the significance of

VFR travel to small and peripheral economies (Carlsen 1996; Buchanan; 1996; Hall 1998).

The role of family and friends residing at a destination has received increased attention in the VFR literature. This influence is identified as encompassing the decision-making process, the information search and the itinerary planning of the VFR traveller (Gitelson & Kerstetter 1994; Meis, Joyal & Trites 1995; Seaton & Palmer 1996). Pearce (1998) identifies a role for VFR tourism in stimulating the intra-state travel market, suggesting that when visitors stay in the homes of local people, there is often joint travel activity. A social and community function is also performed by VFR travel. In showing visiting friends and relatives around their region, local residents 'come to understand and are forced to present and in a small way justify the nature of their own residential world' (Pearce 1998, p.35). In an assessment of the social impacts of tourism, King, Pizam and Milman (1993) also note the role tourism can play in affirming a host community's culture.

Marketing to local residents has emerged as a key strategy in harnessing the influence of the host and capturing the benefits associated with positive resident opinions and attitudes toward tourism. Marketing campaigns aimed at raising resident perceptions and knowledge of a home destination are suggested as necessary in fostering the influence of the residential population (Yuan, Fridgen, Hsieh & O'Leary 1995). In respect to Tasmania, David (1996) suggests that education programs are an important component of both the visitor and resident travel experience. Davis, Allen and Cosenza (1988) however, argue that a better understanding is required of local resident attitudes and opinions toward tourism prior to the development of education campaigns aimed at promoting the benefits of tourism to the host community.

In a study of domestic travel activity, Rundle and Hendry (1997) suggest that a favourable attitude towards tourism by local residents relates positively with the number of trips undertaken. However, as is noted by Horneman (1997) little is known about the motives for domestic travel. The importance of image and resident travel is also recognised by Schroeder (1996) who suggests the existence of a relationship between resident image and support for tourism. According to Schroeder, positive images of a resident's home area are typically associated with a greater propensity for local travel, particularly day trip activity, whilst a less positive image is associated with more frequent trips outside of the home area. He offers two reasons for stressing the importance of resident image: firstly that the information provided by the host resident to friends, relatives, and business associates may influence the organic image developed by potential visitors; and secondly; that it may influence the host population's support for efforts to promote and develop tourism. Schroeder's observations are potentially significant in the case of Tasmania, and prompted the researcher to investigate resident attitudes to living in the state as well as towards travel.

The literature identifies the increasing importance of the role played by resident travel attitudes and perceptions in planning and managing tourism. VFR tourism can exert an influence on resident attitudes and perceptions, and is potentially a strong stimulator of intra-state travel. Despite this acknowledgement, there has been limited examination of the influence of VFR tourism on intra-state travel in regional economies and its potential influence over resident image. For regional and peripheral economies such as small island states, negative resident image and attitudes

can potentially undermine the sustainability of tourism and as Caldow (1997) points out, non-participation in tourism activities is the other side of leisure motivation.

2.4 Destination Choice and Travel Motivations

The study of tourism motivation is derived from a range of disciplines. Dann (1977) identified destination pull and motivational push factors as an influential theory. He distinguishes between the pull of the destination in terms of attractiveness and the desires and needs of individual tourist. As an area of research, travel motivation is complex, and identifying the multi-motivational determinants that shape tourist flows is often difficult (Mansfield 1992). Motivation however, is identified as the trigger to the whole travel decision process, and as such it is the key influence on tourist preference and holiday choice (Goodall 1991).

Destination choice models have emerged as a popular approach to systematising the travel decision-making process (Gilbert 1991; Crompton 1992). Most models draw heavily upon consumer behaviour theories and typically include: perceived images of the destination; the travel needs and desire of the consumer; awareness of the destination; attitudes and perceptions formed from the available information sources; preferences; and intention to visit.

In a general model of awareness and choice, Woodside and Lysonski (1989) suggest that travellers tend to assign a mental category to a destination, whether positive or negative and construct their preferences for alternatives from destination awareness and affective associations. The category assigned to a destination will influence the linking of positive or negative associations. Crompton and Ankomah (1993) extend the conceptualisation of the destination decision-making process by proposing that

destination choice comprises of three stages: the consumer develops an early set of possible destinations; this number is reduced to form a late consideration; and a selection is made from that set. Crompton (1992) notes, however, that there is relatively little understanding of how internal processes and external influences interact and contribute to formulating particular choice sets.

Moscardo, Morrison, Pearce, Lang, and O'Leary (1995) point out that destination choice models have tended to over-emphasise the understanding of why people travel, rather than attempting to develop linkages between motives and destination choice. The authors suggest that activities are the critical link between tourist motivation and destination choice. Fodness (1994) argues for a functional approach to leisure motivation research suggesting that in constructing an 'agreed upon conceptualisation' of travel motivation, a relationship between needs and personal goals must be established (p.556). In extending this view, Galloway (1998) suggests that the external characteristics of a destination which act as pull factors are better emphasised in relation to visitor's values which reflect the 'ongoing beliefs about personally preferable modes of conduct and end states' (p 150).

Leisure scales are also a common approach to travel motivation (Beard & Ragheb 1983). In deriving a leisure motivation scale for holiday travel, the role of significant others in the travel decision-making processes has been noted by Ryan and Glendon (1998). From a psycho-sociological perspective, the concepts of involvement and the perceived influence of reference groups such as friends and relatives are viewed as the determinants of motivation, behaviour and derived satisfaction (Peter & Olson 1994; Gitelson & Kersetter 1994).

2.5 Conclusion

The literature is consistent in acknowledging the importance of travel motives in the destination choice process as well as the complexity of travel motivations. The literature associates VFR travel with underlying social structures and reference groups. Consequently, the 'pull' of the destination plays a secondary role in the destination choice process, with the push factors exerting greater influence. This does not, however, negate the importance of VFR travel for a destination. In fact there is a growing body of evidence which suggests that effectively targeting VFR travel can generate substantial economic and social benefit.

The study of tourism impacts in small island states is clearly well developed. The literature reveals that tourism in small island states is typically characterised by a high level of government involvement; dependency on inbound travel markets; a restricted domestic travel market; limited social and cultural resources; and a high degree of foreign investment. The literature also identifies a relationship between migration and subsequent tourist patterns primarily in the context of visits to friends and relatives. Research considering its application to small island state tourism is however, limited. Furthermore, the study of island state residents and their motivations for travel is in its infancy.

Two key questions emerge from the literature. Firstly, how does an island's isolation influence the travel behaviour of small island residents? Secondly, how does VFR tourism influence the travel activities of small island states? In addressing these broad research questions, Tasmania's situation provides a useful context for exploring the factors which influences the travel behaviour of small island residents. Given the state's reliance on inbound travel, the growing propensity for out-of-state travel, and

the limited scope of the intra-state travel market, understanding the influences on island residents is an important policy consideration for Tasmania.

Chapter 3 Australia's Island State

This chapter aims to build upon the information provided on Tasmanian tourism in the introductory section of this study. The chapter provides an overview of the economic significance of tourism to the state including the level and type of inbound travel activity. The key features of Tasmania's resident travel market are also identified.

3.1 The Economic Significance of Tourism in Tasmania

Tasmania offers an interesting example of a small island tourism destination.

Tourism contributes approximately 8.3% to Tasmania's gross product and generates around 18,700 jobs, equivalent to 10% of the state's total employment (Centre for Regional Economic Analysis 1997). While growth in inbound travel has remained constant, the smallness of Tasmania remains a constraint on development.

Tasmania has a population of 473,500 and a land area of 68,050 square kilometres amounting to just 0.9% of Australia's landmass. The state's economy is also small contributing only 2.1% to Australia's Gross National Product (Department of State Development 1999). Interestingly, Tasmania exhibits many of the characteristics of the MIRAB framework as described by Bertram and Watters (1985). The state is characterised by high outward migration, reliance on external funding in the form of Commonwealth grants, heavy debt and a proportionally large government.

Relative to other Australian states, Tasmania's economic performance is poor and over the past decade the growth in both investment and employment has been significantly below the national average. A number of factors have been identified as contributing to the state's economic arrest namely; a decline in resource commodities; centralisation of functions by large corporations; job shedding in the public and

private sectors; and population decline (Nixon 1998). In addition, Tasmania's size and island status have given rise to relatively small local markets and a lack of competitive industry. Subsequently, the state is vulnerable to negative changes in interstate and international markets. Major employers are generally owned and controlled by interstate and overseas interests, particularly in the service sectors. Globalisation has increasingly rendered the operations of Tasmania's companies uncompetitive due to high input costs and small economy of scale (Nixon 1998). The net result for Tasmania is greater reliance on funding from external sources.

Compounding Tasmania's poor economic performance is the continued outflow of population from the state. Tasmania's population is decreasing, with a projected decline of between 20% and 58% from 474,000 in 1997, to somewhere between 198,000 and 381,000 in the year 2051 (Australian Bureau of Statistics 1998). High levels of outward migration to other Australian states are a primary factor in the state's declining population base. Population outflows are more evident amongst younger people, with many moving to seek employment in mainland centres.

Tasmania also has an older population than the rest of Australia, and its population is ageing more rapidly.

Loss of population through employment-induced migration and the attraction of educational, social and other facilities available in metropolitan centres has led to a reduced demand for services. In Tasmania, production and consumption led-migration has induced a decline in the availability of services in rural townships (Kelly & Spark 1999). Tasmania faces several policy considerations in assessing the implications of labour and consumption-led migration from the state. Noteworthy in such an assessment is the state's ability to service growth in tourism activity if labour deficits flow from the predicted population decline.

3.2 Tasmania’s Travel Markets

Tasmania’s tourism industry relies heavily on inbound domestic markets. According to Tourism Tasmania (1999a) the state attracted 524,000 visitors in 1998 of which 86% were domestic travellers. Holiday visitors account for 51% (267,240) of travel to the state and VFR travel represents approximately 22% (115,280). Table 1 illustrates the number of visits to Tasmania by trip purpose during the period 1994 to 1998.

Table 1: Visits to Tasmania by Trip Purpose 1994 - 1998

Year	Leisure	VFR	Other	Total Visitors
1994	49%	25%	26%	479,000
1995	47%	25%	28%	482,300
1996	47%	28%	25%	483,200
1997	47%	24%	29%	501,500
1998	51%	22%	27%	524,000

Source: Tourism Tasmania 1999a

Table 1 shows that Tasmania’s share of inbound holiday visits is growing at an estimated rate of around 3% per annum. The number of VFR trips is decreasing at a rate of –1% per annum. It is of note however, that anecdotal feedback from Tasmanian Visitor Survey (TVS) field workers suggests that a high share of visitors experience difficulty in determining their primary purpose of trip. This difficulty experienced by visitors may reflect the multi-motivational behaviour characteristic of travel to the state. Survey instruments designed to capture only the primary reasons for travel, as is the case with the TVS, may lead to an over-reporting of holiday trips with visitors “forced” to indicate only their primary purpose for travel.

In addition to inbound travel, estimates from Tourism Tasmania’s Intrastate Travel Survey, designed to investigate the scale and nature of travel by Tasmanians in their

home state, indicate that 2.4 million overnight trips were taken by Tasmanian residents in 1997. These trips contributed \$290 million to the state economy. While holiday and leisure travel account for a high share of intra-state visits, 56% of overnight visitors stayed in the homes of friends and relatives.

Outbound travel by Tasmanian residents is in the order of 345,000 trips per annum (Tourism Tasmania 1998a). A high share of out-of-state travel is for the purposes of a holiday, and this market has increased at an annual rate of 8% during the period 1992 to 1997. Outbound travel for the purpose of visiting friends and relatives has decreased at a rate of -4%. Table 2 shows the out-of-state travel patterns of Tasmanian residents for the period 1992 to 1997.

Table 2: Out-of-Tasmania Travel Patterns 1992 – 1997

Year	Leisure	VFR	Other	Total Outbound Travel
1992	35%	38%	27%	275,600
1993	24%	39%	37%	284,400
1994	35%	37%	28%	297,700
1995	37%	29%	34%	333,400
1996	38%	27%	36%	353,100
1997	41%	25%	34%	343,600

Source: Tourism Tasmania 1998a

Table 2 illustrates that out-of-state travel for the purposes of visits to friends and relatives is decreasing. Growth is more evident in leisure travel and travel for other purposes. Regardless of travel purpose, it is evident that the propensity of Tasmanian residents to undertake out-of-state travel is increasing. The impact of this increased propensity for out-of-state travel is a state tourism deficit which is estimated at \$189 million (Brian Dermott and Associates 1999).

3.3 Marketing Travel to Tasmanian Residents

Selling Tasmania to its resident population has been identified as a key task in containing the state's tourism deficit (Tourism Tasmania 1999b). Tourism Tasmania acknowledges that changing resident perceptions and travel behaviour requires appropriate marketing and communication strategies. Currently, the state's three regional information centres are responsible for resident marketing. Events and travel shows are common promotional activities and these tend to be regionally based, reflecting the existing regional marketing structure. Industry marketing initiatives range from discounted and value-added package weekends to demand stimulating family passes. At present, industry promotions are typically restricted to the winter and shoulder seasons.

Interestingly, the intra-state market in Tasmania is viewed as a secondary market by many industry operators (Tourism Tasmania 1998b). The value of the market is perceived as low, and the majority of operators focus their marketing efforts on generating growth in inbound travel. Industry has, however, recently become more interested in understanding the motives for resident travel. This is evidenced by research funded by Tourism Tasmania and the Strahan Village Pty Ltd on the intra-state winter market and the positioning of Tasmania's West coast. This research revealed that relaxation, relationship building and discovery are among the key perceptions held by the state's resident winter-break market (Enterprise Marketing and Research Services 1999). Negative perceptions reflected climatic considerations (cold and wet) and a sense of restriction associated with winter activities (nothing to do in winter). The study also identified the state's resident market as being highly price conscious.

As a result of this preliminary research, Tourism Tasmania is keen to further its understanding of the role, value and influences of the Tasmanian intra-state travel market, particularly its potential to reduce the impact of seasonally skewed inbound travel. Tourism Tasmania provided financial assistance for the present research, with the aim of providing a context for the development of a resident marketing campaign. Given that the decline in the state's residential population is recognised as a potential restriction on future demand for intra-state travel, Tourism Tasmania fully supported consideration of the broader influences on the state's resident travel market.

Chapter 4 Methodology

This chapter describes the methodology adopted with a view to generating relevant data and builds upon the preliminary remarks and research questions outlined in Chapter 1. The chapter is organised around three major topics: research design, research process, and data analysis.

4.1 Research Design

Research designs may be categorised into three types; exploratory, descriptive and causal. Exploratory designs are employed to clarify and define research problems; descriptive designs focus on discovering characteristics of populations; causal designs seek to identify cause-and-effect relationships between variables (Zikmund 1997).

Exploratory studies are a source of grounded theory which is an inductive strategy for understanding and confirming theory; it emerges from close involvement and direct contact with the empirical world (Glasser & Strauss 1967). The theoretical importance of qualitative inquiry is often discounted on the grounds that it lacks representativeness and replicability (Sandiford & Ap 1998). In the case of grounded theory, the extent to which the research methods actually measure what is intended is often un-stated, with greater emphasis on the emergence of theory based on observed fact, and the broader objectives of understanding and exploring the meaning of phenomena (Glaser & Strauss 1967). However, for research to produce credible findings, the data must be collected in a consistent, reliable way and must be a valid indication of reality.

In the present research, an exploratory design has been selected to clarify basic concepts, to identify variables, and to identify future research opportunities. The purpose of this research is to explore the travel motivations and perceptions of the

Tasmanian resident travel market, particularly the influence of visits to friends and relatives on intra-state and out-of-state travel. The study adopts the logic of inductive inquiry. The basis for an exploratory design generating qualitative data is twofold. Firstly, this approach can lead to a better understanding of the dimensions of the research problem particularly where the research problem has been the subject of limited research. In the present case, academic inquiry into the dynamics of small island states is well advanced, as is understanding of travel motivations and the migration-tourism relationship. Its applicability to small island state has, however, received little attention to date.

Focus groups were identified as the most appropriate method for gathering qualitative data. As is the case in the present research, focus groups typically involve bringing people together in a social interaction to discuss topics determined by a researcher. The strength of focus groups lies in their ability to explore topics and to generate hypotheses. As a self-contained method, focus groups can be used to explore new research areas. They are a useful method for capturing real-life data in a social environment.

The limitations of focus groups are similar to those confronted by other qualitative techniques namely; problematic data analysis and moderator bias. However, focus groups are increasingly subject to sophisticated methods upon which to judge the validity of findings. These include standardisation, sampling and effective analysis techniques (Morgan 1996). The intensity of the involvement between researcher and subject is another context for validity, with the moderator able to probe for the most truthful responses, thereby yielding a more in-depth analysis than quantitative

methods. Focus groups are valid if they are used carefully for a problem that is suitable for focus group inquiry (Krueger 1994).

The present research problem could benefit from the conduct of other fieldwork techniques such as individual interviews. A combination of focus groups and individual interviews would add depth to the study, with focus groups identifying the range of experiences and perspective, and personal interviews exploring specific opinions and experiences in more depth. Timing and budget considerations, however, limit the scope of the present study. The single-method approach was adopted with a view to eliciting reactions from a relatively wide range of participants in the relatively short period of time available to the researcher.

An alternative research method available to the researcher was survey-based research. However, it is the author's view that understanding destination choice involves acknowledgment of the reasons for travel rather than the description of destination specific travel behaviour. Furthermore, travel motives are a complex area of research. The role of motives in travel behaviour is identified as the force directly influencing tourist preference and holiday choice. Research into travel motives lends itself to the logic of induction, with exploratory techniques such as focus groups used to generate general principles from specific observations. In addition, Tourism Tasmania, the principal-funding agency for this research, supported the use of focus groups as the most cost effective and timely approach to the exploration of Tasmanian resident travel motivations.

4.2 Standardised Focus Groups

It was determined that standardised focus groups would be conducted with a cross-section of Tasmanian residents. In total, five focus groups were held in Tasmania during October 1999. The objectives of the focus groups were to explore:

- the motives of the Tasmanian travellers;
- reasons for participation and non-participation in intra-state travel;
- resident awareness and knowledge of Tasmanian tourism products and experiences; and
- perceptions and image of the state.

On the basis of these objectives, a schedule of interview questions was developed for each of the five groups. The schedule of questions is included in Appendix One. An “icebreaker” question and probes were included to assist in stimulating discussion.

The use of predetermined questions in each of the group discussions enabled standardisation across the interview process. Standardisation of questions, timing of the groups and moderator involvement allowed for comparison of discussion from group to group.

The focus groups were held in different regional locations in Tasmania to ensure that the differences across Tasmania’s three regional tourism programs were investigated. Two groups were held in Southern Tasmania and the North East of the state, and one group was held in the North West. Each group discussion was tape-recorded and where facilities were available, the discussions were also video- taped. The group discussions lasted 90 minutes, and both morning and afternoon sessions were held.

Participants were given a questionnaire to complete prior to commencing the discussion, with a view to obtaining information on the location and purpose of their

last holiday. The questionnaire was marked with an identifying number so that the personal characteristics of individual participants could be assessed. This enabled data analysis on both a group and an individual basis. Participants were advised that they did not have to identify themselves if they did not wish to do so.

4.3 Group Composition

A key consideration in determining the composition of focus groups is the extent to which different categories of participants should be mixed within composite groups (Morgan 1987). One influential factor is the fact that an element of group homogeneity is needed to foster discussion. In the present research, groups were mixed on the basis of the market segments identified by Tourism Tasmania.

Characteristics that were heterogeneous within the groups were: a) destination of last holiday; b) age; c) income levels; and d) labour force participation. The common denominators were: a) have travelled during the last 12 months for the purpose of a holiday; and b) geographic location. In mixing market segments, the moderator's role became critical in enabling participants to feel comfortable in discussing and interacting within the group dynamic.

During the recruitment process, consideration was given to Brian Dermott and Associate's (BDA) approach to lifestyle segmentation which combines socio-economic, life stage and progress through life streams. The BDA market segmentation model is presently utilised by Tourism Tasmania in its market research program. The BDA market segments of particular interest for the purposes of the present research were self-funding and lower income retirees, affluent working couples and lower income working couples. In terms of geographical location, the Southern groups comprised one mixed group of self funding and lower income retirees, and lower income couples; and a group of mixed couples comprising mainly

affluent retirees and affluent/lower income segments. In the North East of the state the groups included one group of self-funding and lower income retirees, and one group of affluent retirees and affluent/lower couples. One group was held in the North West which included affluent and lower income retirees. A limitation of the BDA approach, as is indicated in Appendix Two, is that a confidentiality agreement restricts dissemination of the details of the income, life-stage and labour force characteristics of the BDA markets.

4.4 The Process

A professional agency recruited the participants for the five groups. Ten participants were sought for each group. Telephone screening interviews were used to secure potential candidates, with a predetermined screening instrument detailing the necessary requirements for participation. The screening instrument is appended as Appendix Three. A sample frame was provided by Gateway Tasmania, the northern regional tourism association, which was drawn from a list of Tasmanian residents who completed a questionnaire at the Launceston Cup, Agricultural Festival or the Tasmanian Outdoor Expo. The recruitment agency, however, opted to use its own resident listing and candidates were randomly selected from the agency's database.

Participation in all focus groups was confined to permanent residents of Tasmania who had taken a holiday during the previous 12 months. For the purpose of the study, a holiday was defined as a stay of more than two nights duration in commercial accommodation. BDA lifestyle segmentation, combining socio-economic, life stage and progress through life streams were also used as basis for recruitment. As an encouragement to participate each candidate was offered an incentive of \$30.

The researcher acted as the moderator in each of the focus groups. A semi-structured approach was taken to the moderation process, and all participants were encouraged to engage in the discussion. Prior to staging of the discussion groups, it was determined that a medium to high level of moderator involvement was required given the need to accommodate the mixed market segments included in each of the groups. The moderator set rules at the beginning of the discussion and this included allowing each individual a chance to speak without being interrupted and confining discussion to the set topics. The moderator also directed questions at individuals to encourage participation. A debriefing session with representatives of Tourism Tasmania was conducted at the conclusion of each focus group. These sessions formed the basis of moderator summary notes which assisted in data analysis.

4.4.1 Data Analysis

What people actually say and their description of events observed is the essence of qualitative data. The two basic approaches to analysing focus group data are ethnographic summary and systematic coding via content analysis (Morgan 1987; Krueger 1994). Ethnographic summary relies on the use of direct quotations of the group discussions whilst content analysis is the process of identifying, coding and categorising the primary patterns in the data and typically produces numeric descriptions (Babbie 1989). The group is the primary unit of analysis irrespective of the approach that is adopted.

Transcript-based analysis was applied to the qualitative data derived from the five focus groups, with participant observations and interactions transcribed verbatim from the tape and video recordings of the focus groups. The predetermined questions served as the practical structure for organising the data and enabled comparison of the

groups. The verbatim transcripts of each focus group are appended as Appendix Four.

The triangulation method was used for analysis in the present study and involves the use of two or more approaches to analyse a simple data set. The application of ethnographic summary and content analysis enabled the assessment of similar patterns in the data and assisted in the verification of findings. The approach can also assist in communicating the richness of the data to a non-technical audience. The ethnographic summary approach to data analysis allows for the words and ideas generated by the groups “to speak for themselves.” The fact that the focus groups were structured assisted in the content analysis. Whilst computer programs are available to assist in identifying and coding categories, a manual review of each transcript was preferred for the purposes of the current research. A classification scheme was drawn up using key categories and these were coded manually.

A classification scheme was derived through content analysis and is based on the approach proposed by Hereks (1987). He defines a theme as ‘any idea or complete thought somehow related to the respondents reasons for or motive behind’ (p 560). In the present research, the ideas and observations generated by the participants were translated into sensitised concepts by the researcher (Patton 1990). These concepts are the result of the researcher’s direct experience with the data and the process of content analysis. Content analysis is essentially a coding operation and the approach adopted in the current research was a simple count of the frequency with which particular themes appeared. The initial coding was based on a tallying of observations which appeared to be similar. Each time a word or idea was mentioned

it was equated to one. Applying content analysis allowed for a cross check of the sensitised themes that emerged from the ethnographic summary.

A questionnaire, distributed to participants immediately after the icebreaker, enabled identification of each of the participants and made possible the analysis of individual responses. The questionnaire is attached as Appendix 5. In focus groups, it is common for the group to be the unit of analysis. For the purposes of the present research, Tourism Tasmania was particularly interested in the differences between market segments. In response to this expectation, a code was applied to individual participants in the case of the questionnaire and the verbatim transcript. Individual analysis was further facilitated through the introduction process in which individual names and destinations were correlated.

As identified through the content analysis process, an exploratory perceptual mapping technique known as correspondence analysis (Greenacre 1984) was used to demonstrate the association between destination of holiday and individual travel motivations. Data on the destination of last holiday, time of travel, market segment and individual travel motivation/s as stated in the focus group discussion, was organised into a contingency table. Correspondence analysis was applied to that table to produce displays which summarised the main association between visitor types and motivations for travel. As observed by King and Edwardson (1997), this type of analysis can assist in communicating findings to interested industry partners. This was an important consideration given the relevance of research findings to industry operators. Perceptual mapping also allowed for intuitive interpretation of the information.

4.5 Limitations

The present research is limited to the extent that it is single method; it draws on the findings from focus groups to generate theory for future testing. Moderator bias is a potential limitation of all qualitative studies and in the present research, the researcher acted as the moderator in the group discussions, which potentially limits the objectivity of findings. However, analysis triangulation in which the data generated from the focus groups were analysed by ethnographic summary and content analysis assists in increasing the validity of the findings. The author contends the benefit of the research is that insights are generated and the research problem clarified, leading to the potential for future research.

Chapter 5 Research Findings

This chapter presents the patterns of the data results and analyses them for their relevance to the research. Tables are included to assist the reader in understanding the qualitative data. The research findings are based on five group discussions in which a total of 49 Tasmanian residents participated. The age range of participants was from mid-thirties to late-fifties.

The group discussions presented a diversity of travel experiences. Many of the participants reported taking several holidays in the previous 12 months. The data analysis process revealed a number of key themes which characterise Tasmanian resident travel motives and their perceptions of the state as both a holiday destination and as a place to live. These themes are derived from the similarities and differences which emerged both within and across the group discussions. The group discussions also gave rise to the key inhibitors to intra-state travel and participant awareness of Tasmanian tourism product and information sources.

5.1 Motives for Travel

Groups were questioned on the motives that prompted their last holiday. A diversity of motives emerged both across and within the groups. Many respondents reported dual motivations, with pleasure and relaxation generally combined either with business, events or visits to family and friends. Common themes that emerged across the groups were:

- A sense of the new
- Discovery
- Rest and relaxation
- Escape
- Family commitments
- To travel as a group

Discovering new places and cultures, and 'seeing new things' were prominent themes amongst the groups. Seeing something new or gaining a new perspective on Tasmania or mainland Australia was important in setting the scene for a holiday. New culinary experiences, new scenery and discovering other cultures were identified as key motives in choosing a holiday. For overseas travel, diverse cultures and '*gaining an insight into ways of living*' were significant triggers.

Retiree participants noted the ease of travel in this life-stage - '*you have the time to do it and experience new destinations.*' There was also a sense that '*you don't really need a holiday as a retiree.*' Seeing Tasmania from a new perspective appealed across the groups given that for many respondents '*Tasmania has been seen.*' A sense of 're-discovering' Tasmania was particularly evident amongst participants who had recently returned to Tasmania after a period of living elsewhere. Returning to the state after periods of living in other places engendered a sense of '*seeing Tasmania for the very first time.*'

Family events such as weddings and birthdays were holiday triggers for many participants. Visiting relatives emerged as a strong motivator particularly amongst those groups with a high share of retirees. Travel was also triggered by the presence of children resident in mainland Australia and overseas. Visits to family, however, tended to be scheduled around other activities such as festivals, events or touring. Travel to visit family was also associated with a sense of obligation. Events such as weddings or visiting family in mainland Australia were regarded as '*not really a holiday.*' The perception was that combining a holiday experience around visits to family was necessary but mitigated against a '*truly relaxing*' holiday.

The desire for rest and relaxation was particularly evident amongst participants who had recently travelled in Tasmania. *‘True relaxation and escape from the daily grind is only found in Tasmania.’ ‘It serves our purpose to just have a three day break to relax.’* The desire escape was reported across the groups as a trigger for taking a holiday, particularly to escape from a cold climate. A holiday to warmer climates provided an *‘escape from putting on jumpers.’* There was frequent reference to escaping the smallness of Tasmania, with the state perceived to be isolated and restrictive: *‘Tasmania is claustrophobic’; ‘It’s a beautiful place but I like to escape.’*

A considerable amount of travel appeared to be triggered by events such as shows, sports, and festivals. The staging of sports events prompted both interstate and intra-state travel. Group travel was particularly evident across the groups, and this involved sporting and social groups such as Probus. Table 3 shows the travel motives identified during the group discussions, relative to their association with Tasmania and other destinations.

Table 3: Travel Motives Associated with Tasmania and Other Destinations

Motive	Tasmania	Elsewhere
A sense of the new	X	√
Discovery	√	√
Rest and relaxation	√	X
Escape	X	√
Family and friends	√	√
Togetherness	√	X
Excitement	X	√
Events	√	√

5.2 Reasons for Selecting a Holiday in Tasmania

Groups were questioned about why they would choose to holiday in Tasmania. This question also captured information on reasons for non-participation, with groups readily identifying why they choose not to travel in Tasmania. The common themes that emerged in terms of reasons for holidaying in Tasmania were:

- Discovery and relaxation
- Familiarity and convenience
- Less costly
- Visits from friends and relatives

Tasmania was perceived as a destination which offers discovery. This was particularly evident amongst participants who were 'returnees' to the state. Tasmania was viewed as offering a sense of 'newness', a '*fresh perspective*' and a diverse experience. Tasmania was also perceived as a place of relaxation, with the lack of crowds and ease of access providing an '*easy holiday option.*' The compact nature of Tasmania was also perceived as an advantage of holidaying in Tasmania. However, divergent views emerged on the size of the state, with the Northern groups seeing the state as '*too short a distance to be a real holiday.*' The Southern groups viewed the 'smallness' of Tasmania more positively, with the lack of traffic and short distances providing a convenient holiday. '*In Tasmania, you can get somewhere quickly - it's convenient.*' Tasmania was also perceived as a holiday destination where '*you can do your own thing.*' Familiarity enabled independent travel which required limited planning and provided a sense of '*knowing what you were going to get in a holiday.*'

Across all groups, the visits of friends or relatives were identified as a reason for holidaying in Tasmania. Touring or taking a visiting friend or relative for a day trip was an opportunity to '*show our state off.*' The group's recognised the role of the local as part of the visitor experience: '*When we go away we want to talk to the*

locals. ' Travelling with visiting friends and relatives enable residents to be *'proud of the state and show people what we have.'*

Tasmania, however, was not seen as an *'exciting holiday.'* Across the groups there was a perception that nightlife, crowds, entertainment and a *'feeling of glamour'* are elsewhere. Tasmania was also perceived as offering an isolated travel experience: *'In Melbourne I don't feel so bad travelling on my own.'* *'There's no way I could take a short break in Tassie by myself - it's too isolated.'* In terms of inhibitors to holiday travel in Tasmania, there was a perception that travelling in the state was a case of *'been there, seen that, not going back again.'* This was particularly evident amongst retirees and lower income earners. Family commitments were also raised as an inhibitor to frequent Tasmanian travel, with family elsewhere triggering interstate and overseas travel. *'I'd like to do a lot more in Tasmania but it's family commitments elsewhere that stop us.'*

Booking in advance was recognised as providing a less costly holiday for travel outside of Tasmania. The inability to use the benefits earned through airline loyalty programs such as Frequent-flyers to travel elsewhere was mentioned by a number of participants and this was evident particularly among retirees. Several participants expressed the view that the limited number of 'free' seats available per flight restricted the ability *'to make a quick departure from the state.'* Planning was also dependent on the holiday motive. If an event or family celebration triggered the holiday, planning was perceived to be more important with bookings made at least several months in advance. Spontaneity also emerged as a key perception for intra-state travel. Tasmania provided a quick, easy and spontaneous holiday experience. Across the groups, two to three days planning was considered the normal time

required for planning a holiday in Tasmania if commercial accommodation was to be booked.

Groups were asked to identify what experiences they would be willing to pay for as part of a Tasmanian holiday other than accommodation. Across the groups, Tasmania was perceived as a 'known experience' with all groups indicating a level of reluctance to pay for experiences that were familiar. The groups identified food and wine as a key component of holiday travel in Tasmania: *'Some of the best things are free, but what I eat and drink is a very integral part of the trip.'* *'I love finding a little pub and just sitting, watching people and eating good food.'* There was a sense that for residents, Tasmania did not require a guided tour and that the benefit of holiday in the state was the familiarity associated with the holiday experience. Paying for fully guided tours of the state was not supported across the groups: *'In Europe we pay for a guided tour but not in Tasmania.'* The cost of paying for specific attractions reflected locational differences. All groups commented on the perceived expense of paying to see attractions that were familiar. Paying to see attractions with friends and relatives was perceived as an imposition rather than as an enjoyable holiday experience.

5.3 Differences Between Visitor Type and Travel Motives

Figure 1 depicts the main attributes as they apply to the two travel groups relevant to this present research - those who travelled in Tasmania and those who travelled elsewhere. The figure demonstrates the association between destination of holiday, individual travel motivations and market segments. Similar attributes are plotted so they appear close to the destination of travel. More contrasting attributes are plotted further apart. Tasmania is positioned on the right-hand side of the diagram and travel elsewhere is to the left. In relation to each other the destinations have few common characteristics, however, some associated attributes are evident.

Figure 1: The Association between Destination, Visitor Type and Travel Motive

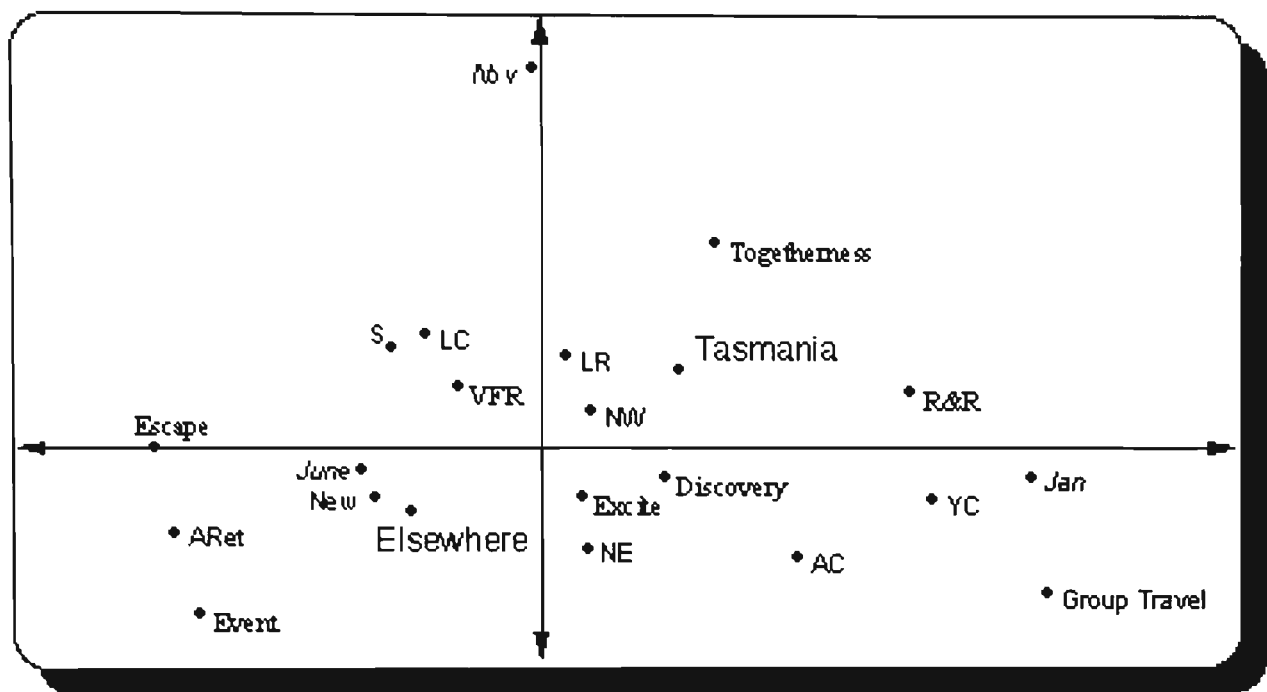


Figure 1 shows that holidaying in Tasmania is associated with the motivations of ‘togetherness’ and ‘rest and relaxation’. In relation to the BDA markets segments, affluent couples (AC) and young couples (YC) are more closely associated with Tasmanian holidays than are affluent retirees. Young couples are closely associated with group travel, particularly in January. Lower retirees (LR) have the closest association with travel in Tasmanian. The figure also shows that travel outside Tasmania is associated with the travel motive of seeking new experiences. Affluent retirees (ARet) appear to have an association with travelling outside of Tasmania for events and to escape. As a motivation, escape appears to have an association with travel in June. Lower couples (LC) are closely associated with visiting friends and relatives in other destinations. Visiting friends and relatives as a motivator is more closely associated with holidays outside of Tasmania. Travel in November has limited association with either destination. Motivations of excitement and discovery are associated with North East (NE) respondents and this is positioned closer to holidays outside rather than within Tasmania. Southern (S) respondents are closely

associated visiting friends and relatives and this is positioned closer to holidays outside of Tasmania. North West (NW) participants have the closest association to Tasmanian holidays.

5.4 Perceptions of Tasmania

The groups were asked to identify Tasmania's key assets as perceived by visitors to the state. Key themes that emerged were:

- Diversity of scenery and natural attractions
- Quality food
- Quiet and relaxed lifestyle
- Safety
- 'Clean and green'

The groups viewed Tasmania as a quiet, safe and diverse destination offering visitors a quality experience. The changing and diverse scenery, compactness of the state and the '*clean, green image*' were viewed as setting Tasmania apart from other destinations. There was also a perception that Tasmania was a '*misunderstood destination*.' Unrealistic perceptions of the size of Tasmania, inadequate publicity and inappropriate icons contributed to visitors '*not really knowing what to expect*.' Tasmania's weather was perceived as a key reason for people not visiting the state.

The groups were asked to identify where they would take a visiting friend or relative in order to ascertain their knowledge of Tasmania's tourism products. A probe attempted to elicit more detail on the groups' knowledge of Tasmanian tourism products. There was a perception that travel with friends and relatives is limited by both time constraints and the interests of visitors. However, across the groups there was recognition of the guide-role performed by the resident: '*We play travel guide which we enjoy*.' The groups also supported the view that a better holiday experience

was offered to the visiting friend and relative if accompanied by the host: *‘You can show them off-the-beaten track experiences such as beaches and caves they’d never see if travelling by themselves.’*

In terms of awareness of tourism assets, the most striking difference was the regional knowledge base of participants. The Northern groups exhibited a greater awareness of areas outside the North, with specific attractions and destinations discussed in detail. The Southern groups reported destinations and attractions in the Southern region only. The North West group was well versed in attractions in the North West but appeared to have limited knowledge of destinations outside of the state’s tourism icons. In describing Tasmania as a place to live, the groups identified with a positive image of Tasmania. Pride in the state and its assets, and a ‘sense of place’ were evident across the groups. For many participants living in Tasmania was a conscious choice based on lifestyle considerations. The groups perceived Tasmania to be a relaxed, easy and safe place to live. Descriptions with religious connotations were used across the groups to describe Tasmania and included statements such as *‘God’s country’*, *‘spiritually healing’*, and *‘paradise.’* Access to nature - rivers, mountains and beaches; the lifestyle - lack of traffic, free of ‘hustle and bustle’, the pace of life; and the people, were viewed as integral reasons for living in Tasmania.

Tasmania was also seen as isolated and reliant on transport services. The ability to leave the state at short notice was highlighted across the groups as a source of frustration. Table 4 provides an overview of the words and phrases most commonly used in describing Tasmania as a holiday destination and place to live.

Table 4: Key Words Used to Describe Tasmania

Holiday Destination	Place to Live
Easy	Peaceful
Familiar	Relaxed
Relaxing	Quiet
Spontaneous	Safe
Compact	Insular
Diverse	Lethargic
Quality	Anti-development
Costly	Unhappy
Boring	Disadvantaged

In relation to population decline, a sense of loss was also evident with the groups acknowledging *‘the growing number of youths leaving the state to find new opportunities.’* As was stated by a participant *‘there’s not too many people I know who have not lost someone to the mainland.’* Concern was also evident particularly amongst the older participants that *‘we’ll end up a retirement village.’* The inevitability of leaving Tasmania was also evident as is shown in the statement from one younger male participant: *‘I know I’ll have to leave at some stage - but I’m not ready yet.’* Negative perceptions of Tasmania reflected a feeling of lethargy, the slow pace of life and a lack of development. A sense of sadness and sentiments of anti-development were also reflected by some participants: *‘We’re not a happy bunch;’ ‘I wish things would just happen - we always seem to debate all developments;’ ‘People put things down all the time.’* There was also a sense of Tasmania being penalised as an island state, with higher prices, restricted access and lack of development opportunities attributed to *‘that strip of water.’*

5.5 Summary of Findings

The data analysis process revealed a number of key themes which characterise Tasmanian resident travel motives and their perceptions of the state both as a holiday

destination and place to live. These themes include discovery, visiting friends and relatives and escape from the familiar. Importantly, the Tasmanian resident travel market appears to be a heterogeneous group, with a diversity of motives reported both across and within groups. Visiting friends and relatives, discovering new destinations, and rest and relaxation were identified as the key motives for undertaking a holiday trip. These motives for travel, however, seem to be influenced by a number of factors including age and life stage.

Tasmania's appeal as a holiday destination appears to be associated the compactness of the State. In this respect, Tasmania is perceived as an easy and convenient holiday option. Triggers for intrastate travel range from visiting family and friends to seeking rest and relaxation. Tasmania is also perceived as a familiar destination. Holidays in other destinations, however, appear to offer excitement and a sense of newness. For some residents, this perception of familiarity appears to limit the appeal of the State as a holiday destination.

These findings are further discussed in the following chapter.

Chapter 6 Discussion

In addressing the key research questions, the present chapter is structured according to the following issues: the travel motives of Tasmanian residents, the influence of VFR travel on intra-state and out-of-state travel, and resident perceptions and image of Tasmania. A final section provides an overview of future research opportunities.

6.1 The Travel Motives of Tasmanian Residents

Tasmanian residents travel for a variety of reasons and clear differences are evident between the motivations for out-of-state and intra-state travel. Out-of-state travel is associated with new experiences and with the need for escape, whereas intra-state travel is associated with ‘togetherness’ and ‘rest and relaxation.’ Visiting friends and relatives also appears to trigger travel in the case of both intra-state and out-of-state travel. However, out-of-state travel triggered by visits to friends and relatives is influenced by a sense of obligation prompting dual motives: visits to friends and relatives appear to be structured around other events and occasions. Travel motives also appear to differ on the basis of age and life-stage. The need for excitement appears to be more closely associated with younger Tasmanian residents, with older residents apparently more influenced by visiting friends and relatives.

Loyalty programs such as Frequent-flyer schemes appear to exert an influence over Tasmanian out-of-state travel. In each of the focus groups, frequent-flyer schemes were discussed in the context of out-of-state travel. These loyalty programs appear to be influencing out-of-state travel and while they do not offer a *‘quick escape from the island’*, they have the advantage of affordability.

The impact of brand loyalty programs on the travel patterns of residents is interesting in the context of broader trends in Australia’s national travel market. Domestic travel

activity in Australia has been declining. The increased propensity for overseas travel in response to cheaper long-haul destinations and changing cultural attitudes to holidays, have resulted in a sharp decline in domestic holiday travel (Jarret 1998). In the case of Tasmania, these influences are relevant but are likely to apply in the context of intra-state travel because of the state's separation by water from mainland Australia. That is, the growing affordability of out-of-state travel through both cheap domestic travel prices and the rewards offered through brand loyalty programs such as Frequent-flyer schemes, may be encouraging Tasmanians to substitute intra-state travel for out-of-state travel.

The findings of this study suggest that a desire to escape from a cold climate and the 'smallness' of Tasmania act as triggers for travel to other destinations. This too is influenced by a desire to experience new destinations. Tasmania is perceived as 'too familiar' and as not offering a sense of newness or excitement. Interestingly, Tasmania is promoted to inbound markets as a place of escape. Escape from the everyday has a variety of manifestations, and for Tasmanian residents escape from the familiar appears to be influencing out-of-state travel. The literature reveals that islands attract visitors both because of their intrinsic appeal and because of their difference. In this sense, islands offer an opportunity to escape from the mainstream to an environment that is perceived to be different. The concept of 'islandness' is typically referred to as a major appeal of island states. Conversely, for island state residents, the concept of 'islandness' may lead to the increased appeal of other destinations. The influence of islandness on island state residents, particularly the 'constraint of isolation', offers an interesting and potentially valuable area of research.

6.2 The Influence of Visiting Friends and Relatives

In the case of Tasmania, VFR motives appear to act as a trigger for both intra-state and out-of-state travel. The data suggest that the influence of VFR travel is greater in the case of older travellers, particularly retirees. Intuitively, this association appears sound. However, the data do not allow for an empirical assessment of the degree of difference between age and travel motive. The data also suggest that the influence of VFR travel is more likely to be associated with out-of-state travel. One potential scenario, given Tasmania's aging population and the state's migratory history, is that out-of-state VFR trips will continue to grow. However, the data also suggest that the desire for escape and new experiences is also triggering out-of-state travel, and that VFR is but one of a number of influences on out-of-state travel.

The value of VFR tourism in stimulating the intra-state travel market in Tasmania is considerable. In reflecting on previous studies, the social and community function performed by VFR travel appears to be relevant for Tasmania. The data confirms that residents influence the travel decisions and behaviour of VFR visitors. The visit of a friend or relative was perceived as a '*special occasion*' and most group participants supported the notion that the guest travel experience would be enhanced when accompanied by a host. Time considerations, work commitments and the individual preference of the guest were however, recognised as limiting the ability to '*play tour guide*.' These findings suggest that the host influence could be an important consideration in developing programs aimed at stimulating VFR travel. Such programs must, however, recognise the constraints associated with hosting guests. It is likely that age and life-stage are significant considerations in determining the level of support provided by the host to the VFR visitor.

Likewise, information is an important factor in influencing the travel decisions of the VFR visitor. In the case of Tasmania, the data suggest that the knowledge that residents have of their state as a holiday destination is highly localised, particularly in regard to the provision of visitor information services. The apparently low level of awareness and knowledge of Tasmania's tourism assets may in turn, limit resident influence on the travel behaviour of VFR visitors.

Managing the influence of VFR travel on resident travel behaviour presents both a challenge and an opportunity for Tasmania. Three issues are particularly worthy of greater consideration. Firstly, the influence of VFR on out-of-state travel is considerable. Tasmania's aging population and predicted population outflow suggest that out-of-state travel patterns may increasingly be linked to VFR travel motives. The findings of the present study also suggest an association between age and VFR travel motive. Secondly, VFR travel is an influence on intra-state travel though this appears to be less significant than in the case of out-of-state travel. Finally, the relationship between resident knowledge and VFR travel behaviour is likely to be significant for Tasmania. The findings of this research suggest that in the case of Tasmania, promoting tourism assets to residents is likely to result in better awareness of tourism products and will influence the travel behaviours of VFR visitors to the state.

6.3 Perceptions of Islandness

Islandness is much prized by those who reside on islands. In the case of Tasmanian residents, the value of the state's 'islandness' is well appreciated particularly its compactness and coherence. Tasmania is viewed as offering a quality lifestyle, with safety, relaxation and spiritual aspirations considered as key attributes. As a holiday destination, Tasmania is perceived as a convenient and easy holiday experience. The

compactness of the state is seen as providing ease of access to a diverse range of recreation and scenic attractions. Tasmania is also perceived as providing a spontaneous and relatively inexpensive holiday experience. However, there appears to be an unwillingness amongst residents to pay for 'familiar' experiences. New and novel experiences are perceived as more appealing. In this sense 'islandness' appears to lead to an increased desire for new experiences and destinations.

The findings of this present research also suggest that for Tasmania residents, 'islandness' is associated with geographic isolation and '*that strip of water*' is perceived as insulating and '*penalising Tasmania's development.*' Insularity appears also to be perceived in relation to inhibiting '*quick departures,*' increasing the cost of living and encouraging youth to leave the island. The impact of 'the young' leaving Tasmania appears to be recognised and this is accompanied by a sense of sadness and loss.

A loss of appeal in key source markets is a problem for many tourism destinations. This situation may arise as a result of overuse, inappropriate development and changing tastes. Islands such as Tasmania are not exempt from this, and because of their limited size and resources, they can be regarded as less able to adapt to changes in taste and markets. In Tasmania's case, the loss of appeal appears to be associated with the state's internal travel market. The findings of this research suggest that residents perceive Tasmania as a familiar travel destination, and in this respect the fascination of other destinations appear to be influencing resident travel behaviours. While the literature reports that distinctiveness, isolation and adventure help to create the fascination of islands, for island residents 'islandness' may play a significant role in influencing out-of-state holiday travel.

There is nevertheless, an opportunity to increase resident demand for day trips and overnight visits by emphasising Tasmania's compactness since accessibility and convenience are closely associated with the Tasmanian holiday experience.

Tasmanian travel is associated with motives such as discovery, rest and relaxation and togetherness. Providing product which appeals to these motives and is perceived as offering 'value for money' may encourage greater intra-state holiday travel. In addition, communication activities which highlight new attractions and experiences may also provide an opportunity to increase awareness and demand for intra-state holiday travel.

The concept of 'newness', particularly building upon Tasmania's nature-based product, could be harnessed more effectively as a component of industry and government promotions. A recent initiative with the potential to provide experiences based on discovery and togetherness is the introduction of a number of short and assisted longer walks in the state's national parks. At present such experiences are not actively marketed to the resident population. The development of a statewide resident marketing strategy could enhance resident awareness and pride in Tasmania's tourism assets.

Chapter 7 Conclusions and Opportunities for Further Research

This study has highlighted a number of factors which influence the Tasmanian resident travel market, and predominantly the influence of VFR travel on the state's population. The findings suggest that VFR influences the intra-state and out-of-state travel activities of Tasmanian residents, particularly in the case of older residents and most emphatically in the case of retirees. This apparent association between age and travel motives offers an opportunity for further research.

The findings also highlight the potential to build upon the resident-guest relationship as a means of stimulating Tasmania's intra-state and inbound markets. "Postcard campaigns" have been used elsewhere as an effective means of stimulating inbound VFR trips. These campaigns typically involve the distribution of postcards amongst the host population who then forward them to friends or relatives, thereby prompting joint host-guest travel. Tourism Tasmania has recently implemented such a campaign, with postcards being distributed amongst the state's resident population. This campaign aims to stimulate both inbound and intra-state travel whilst engendering pride in the Tasmanian holiday experience amongst residents. In addition, Tourism Tasmania supports the development of programs focused on promoting local attractions and events as an effective means of stimulating intra-state travel.

Based on the findings of the present study, tourism development in Tasmania would benefit from an effective statewide resident marketing campaign aimed at engendering greater awareness of the state's tourism assets. Tourism Tasmania acknowledges that changing resident perceptions and travel behaviour requires an appropriate marketing and communication program. The state's three regional

information centres are currently responsible for marketing to the resident population but there is limited knowledge of the services offered by the regional centres amongst residents. Furthermore, the tourism knowledge of residents appears to be highly localised.

While Tasmania offers a variety of visitor attractions, and the state's competitive strengths are well recognised by the tourism industry in Australia, it attracts only a small share of the nation's inbound and domestic visitor markets. The literature identifies that typically small islands cannot generate sufficient internal tourism from their own limited population base, and thus are totally dependent upon external markets. In the case of Tasmania there is both a declining population base and a decreasing propensity for Tasmanians to travel intra-state. The likely outcome of this situation is growing dependence on inbound travel. However, in terms of Tasmania's tourism development the value of the resident travel market should not be underestimated.

The findings of this study highlight that Tasmanian residents can provide a strong source of demand for short break holidays. Residents view Tasmania as an 'easy' holiday option and spontaneity is a key attribute of the holiday experience. The research findings also suggest that familiarity and a perceived lack of excitement characterise resident perceptions of the state. Discovery and togetherness are among the more positive perceptions held by residents towards holidaying in Tasmania. Packaging and product development focused on weekend getaways which offer opportunities for togetherness and discovery may assist in stimulating demand for intra-state travel. However, the present research suggests that residents do very little planning for their intra-state holidays. Industry promotional campaigns, whether they

are co-operative or individual operator based, need to recognise that quick access to a relaxing holiday experience is central to the appeal of the destination.

The concept of 'islandness' is an important element in understanding the dynamics of states such as Tasmania. This study has highlighted that escape is a trigger for out-of-state travel, with Tasmania's smallness both in size and perception leading to feelings of insularity and isolation. Interestingly, Tasmania is well positioned as a destination offering escape. For the state's resident population, however, it appears that 'escape' is offered more readily elsewhere. A major challenge for Tasmania is to ensure that product development and marketing strategies are tailor made to meet the needs of the resident marketplace.

An understanding of consumer trends and the rapidly evolving structure of the tourism industry is also critical to the implementation of successful tourism development strategies. Though the Tasmanian Visitor Survey provides a useful tool to monitor visitor patterns, the inclusion of supplementary questions could help to gauge the extent to which visitors are former residents. This could assist in measuring the scale and nature of VFR travel to the state. Improved monitoring of the out-of-state travel patterns of Tasmanian residents is also required. In addition, the development of co-operative research programs between industry and government will greatly assist in monitoring the intra-state travel patterns of Tasmanian residents.

The increasingly 'hybrid' nature of travel referred to by authors such as Seaton (1996), indicates that understanding travel motives is increasingly complex. Linking travel motives to structural changes such as population outflows in small economies has prompted little academic inquiry. This research has, however, attempted to

provide a guide for further investigation into the influence of VFR travel in small economies. Though the implications of Tasmania's population decline are yet to be fully understood, it is likely that population loss through outward migration may lead to further increases in out-of-state travel. Further research is required to investigate all the ramifications of changes in the state's population.

In conclusion, the findings of this research suggest that Tasmanian tourism development would benefit from investigation into the difference between residents who frequently holiday out-of-state and residents who frequently holiday intra-state. In such a study it would also be appropriate to investigate the association between age and VFR travel motives. Future research could seek to address the extent to which out-of-state travellers differ from intra-state travellers on the basis of socio-demographics, travel motivations, destination perceptions and travel activities. Operational definitions would be required to clearly identify the concepts of travel motives and destination perceptions. The present research, however, provides good scope to develop such definitions.

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Appendix 1 Focus Group Structure

Introduction

- What the session is about
- Rules
- Introduction of participants to one another

Icebreaker:

Where did you take your last holiday?

Short self-administered survey on travel in the past 12 months:

Questions on:

- Demographic: age sex
- Where do you take holidays? (Tasmania/interstate/overseas)
- What time of the year? (November-December) (January-May) (June-October)
- Purpose of trip: (TVS schedule)

Schedule of Questions:

The objectives of this study are the basis of the following schedule of questions.

1. Explore the motivations of the Tasmanian travel market.

Question: Thinking about your last holiday, did you travel for pleasure, escape, relaxation, to be with friends and relatives etc?

Prompt: Excitement
 Something new
 To be with friends or relatives
 Interest in cultural heritage and historic places
 Business
 Meeting new people

Probe: How long does it generally take you from deciding you need a holiday, to actually undertaking the holiday?

2. Reasons for participation and non participation in Tasmanian holidays;

Question: Why would you choose to holiday in Tasmania?

Probe: Excitement
 Something new
 To be with friends or relatives
 To show the state to visitors
 Interest in cultural heritage and historic places

Probe: Are there any reasons why you do not holiday in Tasmania?

 not exciting
 costs to much
 like to go other places

Probe: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.

3. Awareness and knowledge of Tasmanian tourism products and experiences

- Question: Why do you think visitors from overseas or the mainland come to Tasmania for holiday?
- Probe: If a friend or relative visited from the mainland, where would you take them? would you travel with them?
- Probe: Where would you go to find information on travel in Tasmania?
- Prompt: Information centres
Where are they located?
What are they called?

Discuss the image of Tasmania.

- Prompt: How would you describe Tasmania to people who do not live here?
- Probe: What do you like about Tasmania?
- way of life
isolation
the people



MARKETING PLANNING

Ms Carmel Goulding
114 Charles Street
Northcote

14th April 1999

Dear Carmel,

CONFIDENTIALITY AGREEMENT

It is a routine procedure for BDA Marketing Planning to request contributors and colleagues to sign a Confidentiality Agreement to protect BDA's intellectual property and information. Accordingly, we would ask you to read this letter and if you are in agreement, to sign it and return the original to me.

"Ms Carmel Goulding undertakes to restrict circulation of all information relating to BDA, whether supplied by BDA or acquired in the form of market intelligence or market research, to those persons authorised by Carmel Goulding and persons employed by Carmel Goulding who need access to the data as a prerequisite to the execution of tasks contracted by BDA to Carmel Goulding.

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Yours sincerely,

Linda Dermott

.....
Signature

Agreement to terms of letter

Partner

Date:

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Appendix III Participant Recruitment Requirements

**Tourism Tasmania
Screener**

Preliminary Data

1. Interview No.	2. Interviewer
3. Date	4. Participant's Name – Male/Female
5. Phone Number	6. Age Group 1. 25 but under 35 years 2. 35 but under 45 years 3. 45 but under 60 years 4. 60 or over
7. Income Bracket 1. Under \$20,000 2. \$20,000 but under \$40,000 3. \$40,000 but under \$60,000 4. \$60,000 or more	8. BDA Segment 1. Young Couples 2. Affluent Couples 3. Lower Couples 4. Retired Couples

Introductory Statement

Good Afternoon, I'm Jackie from the Tasmanian market research firm of EMRS. We have been asked by Tourism Tasmania to recruit members of the community to take part in a discussion group about the reasons as to why people decide to holiday in Tasmania or holiday interstate.

The discussion will run for a little over 90 minutes and a light lunch/supper will be served. In appreciation of you attending the discussion you will receive \$30. We would appreciate your input and wonder if you might be able to attend.

Now, just a few questions to make sure you are eligible.

1. Have you been to a group like this in the last 6 months	1. Yes 2. No	TERMINATE CONTINUE
2. Do you or anyone in your family work for Tourism Tasmania or in the advertising or market research industries.	3. Yes 4. No	TERMINATE CONTINUE
3. Have you had a holiday in Tasmania of two or more nights in the last 6 months.	5. Yes 6. No	CONTINUE CONTINUE
4. Have you not had a holiday outside of Tasmania of two or more nights in the last 6 months.	1. Yes 2. No IF YES TO BOTH Q3 AND Q4 TERMINATE IF NO TO BOTH Q3 AND Q4 TERMINATE OTHERWISE CONTINUE	
5. Did you stay in commercial accommodation at any stage during your holiday.	1. Yes 2. No	CONTINUE TERMINATE
6. Where was your last holiday destination.	(SPECIFY)	
7. As we are looking for people within a specific age bracket, do you mind me asking whether or not you are	1. 25 but under 35 years 2. 35 but under 45 years 3. 45 but under 60 years 4. 60 or over	
8. Which of the following best describes your household? Are you	5. Single, never married 6. Married with no children yet 7. Married with all children under 16 8. Married with at least 1 child over 16 still at home 9. Married with no children still at home 10. Widowed 11. Sole Parent 12. Separated or Divorced	
9. Are you currently...	1. Employed 2. Unemployed 3. A student 4. Engaged in home duties 5. Retired or on a pension	
10. Is your annual household income....	6. Under \$20,000 7. \$20,000 but under \$40,000 8. \$40,000 but under \$60,000 9. \$60,000 or more	

CHECK BDA LIFE STAGE SEGMENTS

IF INELIGIBLE TERMINATE
IF ELIGIBLE - ACCEPT AND SAY – **Congratulations, the group we would like you to attend is:**

- Group 1 - Hobart – Mixed Group
Monday 27th September
EMRS – 110 Hampden Road
6.00pm
- Group 2 - Hobart – Mixed Group –5 Couples
Monday 27th September
EMRS – 110 Hampden Road
- Group 3 - Penguin – Mixed Group
Wednesday 29th September
Regional Tourism Association – Boardroom – 19 Ironcliff Street
11.45am
- Group 4 - Launceston – Mixed Group
Thursday 30th September
Chamber of Commerce cnr Cameron and St John Street
11.45am
- Group 5 – Launceston – Mixed Group
Thursday 30th September
Chamber of Commerce cnr Cameron and St John Street
6.00pm

I certify this interview has been completed fully and accurately according to the ESOMAR Code of Professional Behavior.

INTERVIEWER.....DATE.....

Appendix IV Complete Set of Transcripts

Hobart Group 1

Icebreaker: Where did you take your last holiday?

- 1: The last holiday I took was to Swansea – there wasn't enough beds at the shack my daughter owns, so we stayed in a motel.
- 2: I'm from Tasmania and I'm just so grateful for living in Tasmania. My husband and I travelled to Deloraine for a special event – we love railways so went for a special get together of rail enthusiasts. We stayed with friends but spent quite a bit on the way. We're not rich but we travel when we can.
- 3: I've travelled quite a bit – I'm originally from England so I know how the other half live (laughter from the group). My wife has relatives in Melbourne and we travelled to visit them. But we went to opening of the Immigrants Museum – that was the real purpose of our holiday, it's just such a fascinating museum – but I don't think its doing so well. But I love to travel – I'll travel anywhere.
- 4: Well I'll be the devils advocate ... I've travelled all over Australia and like the others I love Tasmania. But I wouldn't holiday in Tasmania if you paid me any more (group laughs). I go to the mainland every four months I need to feel and see different things - different people. There are just too many barriers in holidaying in Tasmania. Like I have a dog – I love my dog but I can't take him, all the National Parks ban dogs, anywhere in Tassie – its just too restricting – it really stops us from holidaying here. I'd rather take my dog than my husband on holidays (group laughs).
- 5: Well I'm a non-Tasmanian but I love it – Like Gerard I come from mother England ----- But my last holiday was on the Norwegian Star going around Tasmania. It was beautiful – we saw dolphins and lots of wild life – what's the bird down in Melacouta?? Group response – spotty something Oh yes, the forty spotted partalott. Yes well we loved it, we saw Tasmania from *a new perspective* – from the sea. It was like looking in window shop – seeing something from anew – yes we loved it.
- 6: Well I'm born in Tassie – but I've been on three overseas trips. Our last trip was to Ulverstone and Beaconsfield with a bowls tour. I love Tasmania – we prefer it here - the weather - if the winters were a little warmer everyone else would come. I have a daughter in Western Australia – so we go there every now and then.
- 7: I'm originally from Sydney – my parents are still in Sydney. I know when they are gone we won't go back. I just love Tassie. I also have a daughter in Sale (Victoria). So I travel there quite a bit. Since we've retired we've explored quite a bit of Tasmania.
- 8: We have a holiday shack on the East Coast so we're often going there for a short break. Yes we've travelled extensively in Tasmania. But our last holiday was to Queensland and Northern Territory in June. It was our the big trip – I retired in October so my wife and I did the big trip right up to Northern Territory. It was great, but we won't do that again for a while – we'll probably just do short trips.
- 9: Well I'm Tasmanian. I've travelled overseas - to England and to the mainland. Early on in my married life we holidayed in Tasmania - but now we take the opportunity to holiday on the mainland. Our last holiday was to Brisbane – we just went to look around.
- 10: Like the others I've travelled overseas - my parents live in Victoria so we go there quite frequently. But we've travelled all over Tasmania. My children no longer live in Tasmania –

there in Victoria. So I suppose going to Victoria its like we have too. My children come here every now and then but we feel we need to see them and the grandchildren.

After icebreaker the group discusses the obligation felt to travel to friends or relatives. There were comments that 'You feel guilty if you don't stop over'.

1. **Explore the motivations of the Tasmanian travel market.**

M: Thinking about your last holiday, did you travel for pleasure, escape, relaxation, to be with friends and relatives etc?

S: Well we took the cruise because we wanted to see Port Davey. We'd flown over but it wasn't the same. I'm not a small boat traveller but it was wonderful on the cruise - Matzicka Island, Port Davey, all from the sea. The comments of the other passengers were delightful. We saw dolphins, whales, seals – you name we saw it.

M: Was being in nature part of the experience?

S: Yes we had a parks and wildlife ranger on board who was able to answer our questions.

The group discusses the value of seeing Tasmania from the water – they discuss the different perspective you get from seeing a place from the water.

M: Questioned three on why he travelled on his last holiday?

3: We went to see a *new museum* in Melbourne - the migrant museum. So it was a bit of a special event.

8: We had one special event which determined when we would go. The time of the year. Firstly we targeted the colder time of the year - to escape putting on jumpers. We went to experience Queensland to put on shorts rather than jumpers. It happened that Sultan Bainco Circus was showing so that was our first target - we went to areas we hadn't seen before. The Daintree and places like that. Exploring parts of Australia which we hadn't had time to see before then we went on the Uluru and Kakadu.

10: The shopping - I love to shop in Melbourne - I love to see all the new areas - so much to see-like Southbank - its a beautiful city. The Gold Coast - we do a lot of dancing so and there's a lot of retired people there, there's so much to do - travelling. You don't get the same thing here unfortunately.

6: I'm the opposite to Pat, I like to go for nature and I suppose because our son-in-law is a geology - he took us through mines where they were bats, and he's been in quite a few places. The West Coast at Zeehan. Yes we've been to Cradle Mountain for hikes; we love that type of holiday.

9: I find Tasmania a bit claustrophobic. I love to get out - but that stretch of water - it's really hard to get out - the booking, and Bob Clifford's idea of shuttle boat is an excellent idea. Every year I have to get out. It's a beautiful place - but I like to escape.

Group discussion on the Bass Strait and how the 'stretch of water' is a 'barrier'. Participant 3 leads the discussion. Group appears to agree both verbally and non-verbally that it restricts access.

4: My last holiday was in Tasmania - we can take a week of at a time and go four times a year. My brother has a shack _____.- from the Tasmanian nature point of view your not putting any money into the economy -but just for the *refreshing experience* its great but its not part of the tourism industry. But when we do get out - and spend money for a holiday its an *experiential thing*. We have one *son in Queensland and a daughter in Melbourne* - but we *don't feel obligated to see them any more*. We go because there's an exhibition on but mostly importantly the food. We just love food – I think we eat our way through Melbourne.

Group agreement.

- 2: We stay in Tasmania because of Geoffrey's health. We're very much home bods. Because *we're retired we don't feel we need a holiday anywhere but Tassie*. Its home but it can be holiday.
- 8: Yes it's so much *easier to travel now we're retired* - you really enjoy the time away because you've got time.
- M: Question directed at participant 7- Why do you travel?
- 7: We have a motor home - my husband is still working - but we've become part of the motor home society - so we go to find out what's happening with the lifestyle, wildlife and the like - its so *relaxing*. But my last holiday was to *Melbourne* because my *niece was getting married*. So we took a small vehicle with us - so the main aim was the wedding but we were able to catch up with lots of people all around. Yeah we stayed commercial accommodation.
- M: Question directed at participant 1- Why do you travel?
- 1: The children brought a holiday shack - so we went to Swansea Motor Inn for four nights.
- 2: **Reasons for participation and non participation in Tasmanian holidays**
- M: Have you thought about/considered taking a holiday in Tasmania but have not done it?
- 4: Tasmania is a really unfriendly place for pets. Accommodation and everything is very anti-pets. If I want a holiday in Tasmania I want a holiday with my pets.
- 3: At our age, we *have seen so much of this State* - and most the of the places are close - its not difficult to go Launceston and spend the day at some event - and return home. People don't have to use accommodation - people can camp. It's such a *compact place*. When the Carl Vincent was in port - we took some sailors to Port Arthur they all wanted to go to Port Arthur - it's a day trip. They hadn't heard of any other places.
- 3: Yes but my philosophy is you've got to be ambassadors - I saw three lots of people from Victoria this weekend and I introduced myself to them - its up to us to *be ambassadors for the state*.
- 2: We might be older but isn't up to us to work on the fact - surely a lot of loud noises could make some improvement. That's why we're here - to encourage tourism, to bring people to the State. We've got to make this a place where people want to come - and a place where people want to live.
- 6: Both my *son and daughter had to leave to find work on the mainland*.
- The group discusses the young people leaving the State for jobs – why aren't jobs here – sense of loss and (difficult to get all points of view due to group dynamics – active group discussion). Group discussion on children leaving – “they may well come back”.
- M: Why would you choose to holiday in Tasmania?
- 2: Because we're proud of Tasmania - we want to put the money and knowledge of the state so we can pass it on.
- 5: The West coast of Tasmania is absolutely magnificent - we love the roads with no traffic. We went up the Pieman and that leaves the Gordon for dead. *We always make sure that when we have visitors* - we always make sure we have three or four days to take them around Tasmania.
- 4: Whether we have friends or relatives or whether their just visitors on three day tour - they never come back again. Apart from the beauty of the countryside and the peace - *there's nothing experiential to hold people here or to stay* - or for us to travel - - going up to the Pieman is great but it's a one dayer. You stay overnight and then - *been there seen that not going back again*.

5: ***I don't agree*** (group joins in) but I think its extremely fantastic to stay in Strahan but the trouble with Hobart is we haven't got any small cosy pubs - most small port towns have the dogs in the pub. They have local people telling stories - but in Tasmania the pubs are just pubs. ***There's nothing there to say I want to go back tomorrow.*** The small pubs especially along the waterfront have lost their character.

M: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.

10: A show.

5: Cradle Mountain - the overland track -

M: Would you pay for a guided tour through Cradle Mountain?

Group discussion on guided tours participant 10 questions whether they have guided tours of Salamanca and the like? Group says yes – but no one promotes to locals

2: ***Information is not well publicised.*** Unless you're staying in a country style accommodation you don't get good information - big hotels just a number or person of the street.

5: I think there are guided tours in Tasmania - by brother and sister-in-law come down every year on a guided garden tour. They stay in B&Bs - and have a lovely time - But they say they've never seen it advertised

10: Yes that's it we never see - why don't we Tasmanians see these things - we don't know what's going on out there - why haven't they got places or brochures? We need something in black and white to see it.

M: If something was available - would you use to plan your own holiday in Tasmania?

4: I'd share it with other Tasmanians.

5: ***You could meet people from interstate and all join up***

2: There's a need for civic type notices - to ***let Tasmanians know what's going on*** - TV or other advertising.

6: Yes but a lot of accommodation in Tasmania is well above what is on the mainland – ***it's costly*** (Group agreement).

2: In recent times we don't pay any cash or cheque - we pay on card to try and ***accrue fly by points***

5: If you can get a seat! Trying to get to Melbourne on ***frequent flyer points is impossible*** - we tried to get to Melbourne on frequent flyers three months in advance and couldn't.

8: I did my last holiday all on ***frequent flyers***.

Group discussion on booking in advance – indicate the need for a long lead-time.

9: I really like the B&B accommodation - hotels are pretty boring and sanitised. But it's a ***bit costly - I pay for attractions perhaps once.***

4: Food and wine - but in Tasmania its like travelling on your own - my husband and I have very diverse interests. So if I go to ***Melbourne I don't feel so bad been on my own*** - I'm anonymous - you can do classes through Adult Education - but they're a bit limited.

3. Awareness and knowledge of Tasmanian tourism products and experiences

M: Why do you think visitors from overseas or the mainland come to Tasmania for holiday?

1: ***Scenery*** and all the old ***historic*** places

- 2: Trains - steam trains. The ABT railway will be just great.
- 3: Well I think people come because of its fly fishing, the greatest ocean races in the world, - we have a number of other *events* - but each of these things appeals to a certain selection of people and they will travel regardless. Special events are very important to this state. Cruise ships at Salamanca - Salamanca is quite unique - it's all local products -
- 5: I think that's why they come the first time - but they will come back again - it's a matter of getting them here the first time. And lets face it - what would you do down at Salamanca for more than 2 hours?
- 10: Well I'm down there every Saturday- I admire the work, and what goes on down there.
- 5: Yes but I mean not the market - the area.
- 8: And Tasmania is *perceived to be a very cold place* - by people on the mainland - we're unfortunate in that the weather is unreliable but no worse than Victoria - but we don't capitalise on it. It doesn't seem we try and attract people to experience the cold.
- 9: We should promote our light and the changing moods of the place. One of the most beautiful things about Tasmania is the light - but no one makes anything out of it. You can paint – you know attract art groups and the like - - _____.

Group discussion on the changes of the season and the weather – and the state's perceptions of coldness -

M: If a friend or relative visited from the mainland, where would you take them?

- 4: Strathgordon
- 5: West Coast
- 6: Ross
- 5: Richmond
- 6: North West Coast
- 10: Coles Bay

Group discusses paying for national parks. Some rejection of paying fee. Discussion on greater propensity to pay for overseas experiences because they're new. (Group packages)

- 2: You pay for an experience because it's new not if you've been there before.
- 7: We have a national parks pass and we use all the time - you can see the changes in parks - disabled access, tracks - its opened it up to people who have been there before. you can see where they're putting the money. But wherever you go you have to pay.
- 6: Yes though when you go to places like Port Arthur you feel your being ripped off.
- 7: Fair enough visitors paying but Tasmanians paying to see our own heritage - when we've visitors from the mainland we'll pay to go in but as Tasmanians I think we should be excluded and not have to pay.
- 2: As locals we should get some kind of concession.

Group discussion on paying for mainland experiences – local access to some parks should be free.

4. Discuss the image of Tasmania

M: How would you describe Tasmania to people who do not live here?

7: God's heaven.

3: There's a thing - I think its Tasmania the best kept secret.

1: Breathtaking.

4: Spiritually healing.

5: A little island - with a Mediterranean climate. Not many people - the same size as Scotland. If you really want to come and enjoy and not get caught up the crowd then this is the best country.

2: A very nice feeling when you're coming back from overseas - I'm home - fresh air - a lovely welcome.

The group discusses the feeling of welcome – the feeling of coming home.

M: What do you like about Tasmania?

3: It's compact, accessible and diverse - but not like the Gold Coast with all the razzamatazz. It's low key

7: It's so varied.

4: We spent a month in Mexico last year and the only way to describe it was "Yah" as in Taz the devil (cartoon character). (Group laughs) It amazed us that they identified so strongly with the image - and we had to explain that we weren't really like that.

9: It's a very serene place - with a lot of history but a quieter lifestyle.

10: But I think there's a sadness here - Tasmanians should smile a lot more - there not a happy bunch – it's a bit gloomy.

Group discussion on the impact of the weather on mood - sunny days and rainy days. General consensus the weather reflects moods of people.

End

Hobart Group 2: Couples

Icebreaker: Where did you take your last holiday?

- 4: Lake Tullah, on the West Coast of Tasmania. We would have been on the mainland for three weeks but the Spirit of Tasmania was damaged. So we were stuck. We had to go to Melbourne for a wedding recently as well. But we didn't consider that a holiday.
- 2: A week trip to Sydney to visit family, though I didn't consider that a holiday either. We did a trip away in Tassie only a few weeks ago – we camped and spent some time in the North
- M: You didn't consider a visit to a relative or friends a holiday?
- 2: Definitely not a holiday because we flew in on Friday night and returned Sunday. It was to see Franks's elderly parents, so I don't consider it a holiday but in February we went to the Bay of Fires, we spent three nights.
- 1: Three days at Grindewald (North of Tasmania). We had some friends visiting. But we wanted to go to Melbourne but we enjoyed it – it was really good service.
- 5: Our last holiday was in Melbourne for the International Flower show - four days.
- 1: Yes we do travel in Sydney and Melbourne but we travel virtually all the time in Tasmania. It's such a lovely State and so much to see it's so far to travel in those other states. We do have friends and family in Melbourne and when we go there they take us to nice restaurants and that's a bonus.
- 2: No response – didn't participate in icebreaker - entered room late (6.15pm)
2. **Explore the motivations of the Tasmanian travel market**
- M: Thinking about your last holiday, did you travel for pleasure, escape, relaxation, to be with friends and relatives etc?
- 3F: Rest and relaxation. In Tasmania of course.
- 2F: We went to Melbourne at Easter time. To see friends – but we just to get at really.
- 1F: Yes we went to get out - to get out of the house though - for three days. Because we're retired. And you get into a bit of rut when you're retired - so we go away for three days.
- 4: (4M) We went to a surveying/mapping conference so this one was at Tullah and because we hadn't been to Tullah before we made a trip out of it and went to Lemonthyme Lodge for a very long weekend.
- (4F): Lemonthyme was beautiful, Tullah was *interesting*. "Thank god we don't live there" type of thing.
- M: Did you stay in commercial accommodation when at Tullah?
- 4F: Yes we stayed at Tullah Chalet.
- 4M: It was a bit difficult going to Tullah Chalet after being at Lemonthyme. You really put yourself under pressure (Group laughs).
- M: How long does it generally take you from deciding you need a holiday to actually undertaking the holiday?
- 1M: Days - Oh days.
- 1F: Oh no, probably a week.

- 5M: I came home from work once and said to my wife we're off.
- 5F: No but that's when your retired. Not before that, No a couple of weeks really. You've got to book in and if your going to an event, you've got to arranged tickets and that kind of thing, and let your relatives know your going to be in town.
- 2F: It's guided by our work - we work in a bank so leave has to be planned in advance so
- 2M: Three or four years - (group laughs) don't say which bank we work for, No 12-18 months and that's for annual leave. (2F): We're having holidays in March of next year and Andrew asked for leave in March of this year.
- M: Short escapes? Would that be more spontaneous?
- 2F: Yeah, maybe a month - not like two weeks or whatever, I study as well.
- 1F: We make our mind up if we're going on a local holiday in a couple of hours. Get on the phone - see if we can be booked in and that's it. And also I went into the RACT to do something - and saw Grindelwald advertised. And we were going to Launceston - and I thought well that's only 15 minutes up the road. So I phoned and we went.
- 5F: We like colonial accommodation. (5M) Yes. Lovely old historic homes around the state. And that's were I would stay - we wouldn't stay at motel or hotel.
- 3M: My wife is the planner, she has more fun planning the holiday than going (Group laughs).
- 3F: No not more fun, but there is something I enjoy about planning a holiday. The longer the duration of the holiday the more planning is needed. Doing the research - finding out what's to see and do and that type of stuff. But with Tasmania I don't have to research that because I know it well but you do have to plan.
- 4M: It's essentially triggered by something as far as I'm concerned. Normally takes sometime, I'm a public servant so I have to arranged leave and we've got grandchildren in various places in Australia so if there is something on like a wedding so we'd probably end up going nowhere without a trigger.
- 4F: We live in a nice place on the beach - so it's comfortable so its usually something a daughter getting married in Scotland and then we would build a holiday around that. We hardly ever just decide we'd go.
- M: So would you say that a trigger is family?
- 4F: Yes, we'd make a holiday out of it - but that would be the incentive to get us of our tails. (4M) Or conferences - for work.
- 3M: Sometimes they're an obligation to travel, like family elsewhere - so you make the most of it.
- 5M: We don't like staying with people.
- Group agrees
- 4F: We stay separately -
- 5M: We go away not to make friends wash up we go away for holiday to get away from it for a while - so we don't stay with friends no matter how good they are. It's our rule.
- 3F: I tend to agree with you there but because we see our friends and family so rarely. We did try it once where we stayed in a hotel in Sydney but it made it really difficult.
- 2F: Well I study at the University of Ballarat so when I go away for few weeks at a time and I've developed a good network of friends so I stay with friends now when I go there.

- 4M: Last time we stayed in Melbourne we stayed in an apartment - it's just easier that way - it was fairly close to the wedding - so it seemed more convenient.
- 2F: It's easier for one person to staying at someone else's house but as a couple there's two. And not knowing them so well.
- 1M: We've been to Japan a few times and stayed with friends. And all the people that had been to Tasmania and stayed with us returned the hospitality. They returned the favour. But I do agree that even in a country in which the custom is so different you feel - well its a bit difficult staying in someone else's house.

2. Reasons for participation and non participation in Tasmanian holidays

- M: Why would you choose to holiday in Tasmania?
- 5F: Well we mainly holiday in Tasmania rather than then go overseas or interstate because of the expense. And the ferry - we don't like ferries - to us that's a problem. Because we don't have to hire a car in Tasmania its cheaper to holiday at home.
- 4M: Well yeah sure if we had a bridge or tunnel across the Bass Strait I wouldn't take ferries either - but as far as I'm concerned its an essential trip of any trip to the mainland. I'd hate to be stranded on the mainland without a car.
- 2F: We wouldn't even contemplate travelling on the boat given the time - it's never entered into my mind. Perhaps maybe it's our age - but just go on the plane - that's it. We wouldn't even think of taking our car - we hire one when we get there.
- 2M: Normally our trips around Tasmania are with family - like family in Tasmania. (2F) In Tasmania to get away for two or three nights is all you can afford time wise. We go to relax.
- 1M: I think if this discussion were taken place in Launceston or Devonport there would be a different attitude toward the ferry. It's quite a job to catch the ferry from Hobart. (Group agreement). But it had been a long time since we had a holiday in Tasmania, there's a feeling I've seen it. It such a small State - like the Nut at Stanley - I've seen - why would I go back? Everything is too close.
- 3F: Well we're just waiting for the time when we can put the caravan on the car and just go - like the Boat Harbour Beach which is the most beautiful spot in the world. I grew up knowing Tasmania from a tourism perspective because my family owned a hotel. And I just love it - and from the time our children were young we've taken them around several times and they love it. But we can't always afford to go commercially - though we've stayed in Launceston several times. Maybe a night or two.
- 3M: You can do your own thing. We see a road and want to know what's at the end of it - we explore the place.
- 4F: I'd like to do a lot more in Tasmania but it's the family commitments elsewhere that stop us. (4M) Though we go to Ulverstone every Christmas. (4F) Well sometimes. I would like to back to Lemonthyme which I thought was just glorious - I know I could go back and enjoy it.
- 4M: We like to stay in cabins and caravan parks but I don't know that there is much scope for that in Tasmania -
- 3F: Yes it's becoming more and more the budget style.
- 1M: Yeah like Bicheno -
- 5M: Tasmania has everything in a small area - you can see two or three sceneries in a day.
- 2F: Yeah but to me I do like to go to Melbourne and get that feeling of glamour and intake of entertainment - sports and the like. But in Tasmania its quiet - you get away to see and take in.

- 5M: But you don't get the scope of accommodation - you can't bargain here. Shopping around for accommodation in Tasmania is nearly impossible.
- 2F: I think the shopper docket and things like that are good - our family - my aunty and her husband and two small children are going to the Penny Royal on one of the deals they've got on the shopper dockets. We hadn't been there and now we're going because she saw it on the docket. One nights accommodation for four of them at \$70 and entry to Penny Royal for nothing. That's really reasonable.
- 5M: You can go to the Travelways and go to the cheapest places that way.
- 1F: Or the RACT - I go there for information because I'm a member.
- M: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.
- 5F: No we'd rather do our own thing.
- 1M: Golf
- 2F: And I'd pay for horse riding -
- 4F: Well it depends - say you were going to Hasting's Cave well you can't go there without paying. There are some places where you just can't go without a guide. Like mines and so.
- 4M: I'd pay for anywhere that had a bushwalk and a shower at the end of the day. (Group laughs).
- 5F: Well I think Port Arthur is very expensive for a family - so we wouldn't because of the cost of that.
- 4M: You're embarrassed if you take friends there because they see this hefty bill and you feel you should be paying for them (Group agrees)
- 1M: Other National Parks as well but they're not as expensive as Port Arthur - you go there and it's much better now.
- 4F: We'd pay for Strahan - the Gordon River Cruise - we've been on it many a time but we'd still go back. We buy a National Parks Annual pass because we think its good value for \$40 a year (Group agrees) Yes and I agree that Port Arthur is a little bit expensive. But I wouldn't actually go on a specifically guided tour of Tasmania - but then I don't think I'd go anywhere on an extended guided tour.
- 1M: Coach travel is good - but it's a bit of cattle train.
- 4F: Yes but that's probably because we're Tasmanians - a single person travelling and you want one - you need a guided tour. In Europe we went on a guided tour. But not Tasmania - because we're Tasmanians.
- 4M: But if it was something we couldn't tackle without it - some guarantee of back-up then we'd cough up for sure.
- 1F: But something's like the Grubb Shaft Museum (1M) But the chair lift was a bit expensive. But its something you do on holiday - if you want to see something you pay.
- 2F: No we want to do our own thing. Everything is here that's the advantage of Tasmania - you don't need to be guided. As I said I'm a horse rider so I'd pay for guided tour on a horse. I'd like to do the Tassie Trail and stuff like that. That sort of thing - but you need a guide. And when we go away on holiday we go away to share each other's company so I suppose we don't go away separately - its one of the few times we catch up without pressure. (1M) Yeah time to talk.

4F: And that's really important.

3. Awareness and knowledge of Tasmanian tourism products and experiences

M: Why do you think visitors from overseas or the mainland, come to Tasmania for holiday?

5M: I know why people don't come. (Group laughs)

1F: To visit us - people from England and Japan. We've been overseas to see friends and we've said well you'll have to come and visit us now.

4M: Do you think they'd come to visit you though if Tasmania was not such a pleasant place to visit? Isn't that part of their motivations because they want to come to Tasmania?

1M: Well one of our friends from Japan has been to New Norfolk four times and stayed with us on each occasion - he just loves Tasmania. Away from the hustle and rush.

Group agrees

1M: He can't get over that there's no traffic lights on the Midlands Highway. Where's the traffic he says.

3F: They come here if they bushwalk - to see our scenery.

1F: The internationals should get an add on fare - but people from the mainland don't. They find it very expensive.

1M: The clear sky of a night is a terrific interest to Japanese - they have so much smog they just don't see it.

4F: I think it's the clean green you know and also because it's not so populated and frantic - not polluted. I know it always a nice place to come back to when you've been away.

4M: Yes there's very few places on the mainland where you can just pop on the side of the road and sleep if you have to. So it's a bit safer - not too rough and its comfortable you can drive around easily.

2F: I think the size - our friends come here because they can see so much in 10 days - the beaches, the thick bushes, the mines and the whole lot and yet 10 days and she can get a feel for that. There aren't many places where you can actually experience all those different kinds of things in such a small space of time.

3F: Yes my brother lives in Canberra which is fairly flat and his comment was that he loves because every time I go around a corner I see something different. Which is true.

Some discussion regarding temperature – Misconception of mainlanders regarding the weather particularly rain in Hobart.

5F: We didn't go to Currumbin this winter because of the rain there - the weather was better at home. So we stayed in Tasmania because it was so wet in Queensland and the weather was fine here.

2F: But when is the best time to visit Tasmania? The one negative of Tasmania is the unreliability of our weather.

2M: Yeah and information - how do you know what to do?

M: If a friend or relative visited from the mainland where would you take them?

2F: The Mountain

5M: Anywhere you like.

3M: Mount Field .

1M: Probably anywhere it's free (group laughs) Not to Port Arthur that's for sure.

M: Why is that important?

1F: Well you can't expect them to pay for petrol. So it's expensive - the Japanese expect to be paid for. Bonorong Park for example, we paid for five Japanese visitors - and they really want to go there to see the animals. We're only on the pension so we're restricted.

1M: But there are certain places where you must take them though - the Mountain is one, Salamanca is another and the Nut.

4F: Wrest Point - Mount Nelson and Lake Pedder, nice country although it's flooded it's still beautiful.

3M: You have to find out what they like. Some people like this others don't - one fellow all he wanted to do was fly fish.

4M: I'd rather send them than take them - usually we get rid of them for a while (group laughs) (4F) if they're staying with us - 4M: they go away for two or three days and then return. Places we'd take them would be Hastings, to Mt Wellington - a park or something. I probably wouldn't send them to Port Arthur

2F: East Coast (Group agrees) Freycinet, Wine Glass -if your not right into bushwalking then that's nice (2M) So long as your not hung-over. - group laughs) If you're into bushwalking then you can do the whole trip which is absolutely beautiful.

4F: There's so many places - we've taken them most places now but up to Coles Bay to the Tasman Peninsula - so many places you can send them too. You need to be guided by what they want and how much time you've got to take them. We give them directions and let them do their own thing mostly. We went up to National Park the other day and there's this new place - the Possum Hut which is just wonderful. Its only new and its just opened - it's got everything - no cost you can just sit.

Group queries where it is?

1F: The winery tours up near Grindewald are great- you don't have to buy any wine but it's absolutely beautiful and you can see the vineyards.

3M: Yes I've done that tour - and I drank the wine (group laughs).

4F: Yes there's a supplement in the Mercury about another winery - which is just opened on the way to Richmond - so that's a great place to go.

2F: We'd travel more with friends - most of our relatives are here.

5F: Ours always hire a car, so we don't need to go with them. And some are originally from here so they don't need a guide.

M: How would you find information about Tasmania?

1F: RACT plus the Travelways. Visitors often ask us for information so we have a stash of brochures we use.

4M: When we travel to Melbourne or Sydney we normally get a "What's On Guide" but you only get a little supplement in The Mercury and I never actually seen What's on in Tasmania.

4F: Yes but when you get of the Spirit they give you a What's On guide. Treasure Islanders and Travelways, Is the Visitors Guide to Tasmania still available?

- 1F: Yes there are publications about but they're not readily available.
- M: Do you know of the any information centres in Tasmania?
- 2F: Service Tasmania I've been to before - to get information on Parks and that type of stuff.
- 3F: And there's that place in Davey Street - what's it called. Opposite the Hydro.
- 3M: Oh yeah the information centre.
- 5M: And most hotels and motels give you information -

4. Discuss the image of Tasmania

- M: How would you describe Tasmania to people who do not live here?
- 3M: Treasure Island. (3F) God's country.
- 5F: A Jewel
- 2M: Quiet and peaceful.
- 1F: My English friends describe it as Scotland without the Castles (Group laughs).
- 4M: Like Europe - outside of the big cities that is. (4F) Yes but a lot warmer - less wet. (4M): I often say to people if you can get a job in Tasmania then it's the best place to live. (4F) Yes but aren't we encouraging people to visit not stay, the population is fine the way it is -
- 2F: Relaxed - you get taken away by your career and that but when you come back you realise that the way it is here is completely different to anywhere else - the pace is so much slower -
- 3M: If you want to live here - Its god's country.
- M: What do you like about Tasmania?
- 5M: It's safe.
- 5F: The same reasons why our friends and relatives visit us. The scenery, the views, its just beautiful.
- 5M: I like everything about it except the government. (Group laughs)
- 2F: Its beauty - From my own perspective I feel sad that career wise the prospects aren't here. I mean we're both got good jobs - we can see into the future so we can enjoy the way of life Tasmania offers but for a lot of other young people those opportunities just don't exist which is sad because there will be less young people to enjoy what is offered.
- 2M: I like working here and the people I'm involved in with here.
- 1M: We moved from the mainland to Tasmania to escape the rat race - no traffic, cheap houses, no distances ... (1F) Yes the distance - the light changes, and good climate to grow flowers. Whatever you're interested in its here.
- 3M: So much to do - we live right on the beach - so we wake up to delight - its nice there's not too many problems. From Sydney to here - we're free.
- 3F: I endorse what every one has said - we live 25 minutes out of the city - yet we have all the advantages. We have the best of both worlds - and I never felt lonely here - not like Sydney. It will remain a lovely place for my children to bring up there children.

4F: Well I spent most of my adult life outside of Tasmania - and I never doubted I'd return home. The climate, the distance. We live on a beach - it's just beautiful and in the other cities could we afford to live the way we do here.

4M: Yes a quality of life - we both had good jobs, but we came here regardless. Travelling is convenient 10 minutes to work but in Sydney and Melbourne - an hour or an hour and half by the time you get home you'd be a nervous wreck - whereas here its a pleasure to go home.

M: Anything you dislike about Tasmania?

5F: I think you need to getaway from time to time - to cross the water or you can get very parochial - you need to see another style of life, another city. I love holidays- but I do love coming back.

4M: My office (group laughs).

3M: When some people want to do something there's so many committees, inquiries - why don't they just do things.

4F: Yes it's a bit of a slowboat isn't?

3F: I really hate the parochialism --

5M: Yes but that always been there.

3F: Yes I know but I wish it didn't have to stay. Tasmania's got the population of a suburb of Sydney - we've all got to start thinking of the benefits to Tasmania rather than each corner.

Group discussion on development - pros and cons. Suggestion made to vote in Jeff Kennett as a new leader given that "Victoria doesn't want him".

2M: Tasmania lacks -- it lacks sporting facilities for big games -- it lack of bands -- there's no venues.

2F: Yes but I don't like the negativity of Tasmania by some Tasmanians. There are people that have never been out of Tasmania and they don't know how wonderful it really is here. Some people are really negative about Tasmania

3M: They're called knockers

1M: In the eight years I've been here I don't like the parochialism - one piece of advice that was offered to me was to keep buying mainland papers or otherwise you get a small minded view. So many little communities - I don't know whether its good or bad but it is holding us back.

1F: And the lack of transport - one ferry is not enough. And if you have to go to the mainland quickly say for an emergency you can't get a sit on a plane -

Group agrees - talk of recent Spirit of Tasmania breakdown and the restrictions on access to and from the state.

End

Group 3 - Ulverstone

Icebreaker: Where did you take your last holiday?

- 10: Bridge Hotel in Richmond
- 7: Sydney, Darwin. Arnhem Land – I went backpacking, by bus on a McCafferties. It took 6 weeks
- 2: East Coast of Tasmania, Swansea and Hobart – and yes we did it in two weeks
- 8: We went to Hobart for a wedding.
- 5: I went with a school group around Tasmania
- 4: East Coast of Tasmania, Bicheno
- 9: I used my frequent flyers and spend five nights in each city: Melbourne, Brisbane, Cairns, Darwin, and Perth.
- 3: I went to the Mainland and then Hawaii. My friends and I - we stayed in youth hostels and backpackers with a group of 10 – we're all over 50 but we like adventure – so we had fun.
- 1: My husband and I went to Western Australia. Our daughter lives there so we went to see her and made a holiday of it – we travelled to Broome.

1. Explore the motivations of the Tasmanian travel market

- M: Thinking about your last holiday, did you travel for pleasure, escape, relaxation, to be with friends and relatives etc?
- 10: To be with friends, and people I hadn't seen for some time who had been to Europe - so I wanted to hear all about it. Paris, Rome you know.
 - 7: To see friends on the mainland and the second reason to see parts of Australia that I hadn't seen. There's an awful lot to see. The Kimberleys and our son lives in Arnhem Land. He's a minister in an aboriginal community. So that was one of the reasons.
 - 2: I mostly holiday on the mainland but I just thought I'd like to see Tasmania - take in our beautiful scenery - look around - so to get away and tour Tasmania for a fortnight.
 - 5: Well we'd been waiting to go - my husband and I.
 - 8: My main reason was to visit a sister. So we could share and go off and do things together - it was nice to have that time. And see other things as well and new things
 - 4: Recreation - as a means of leisure. To spend time together as well - we often don't get time to do that type of thing - be on our own, and spend time how we want because of work.
 - 9: Well I'm fascinated by languages, the way people live - so I like to go as far as I can - Europe. I've lived here for 50 years uh, and Europe has been our main place but we've been to Asia. So we're very versatile. We go for different reasons, but the one thing is we're always so terribly pleased to come home.

Agreement from group.

- 3: As a group we try to get away at least once a year. Like 9, because we like to see how the other half live (Group laughs). And we've travelled to Europe. But we actually travel as a group - because we're all pensioners we go as cheaply as we can. The people you meet, and what you can see and do for next to nothing. The people you meet at backpackers are wonderful. But like

the others, I really do love coming home. Most Tasmanians should be forced to travel so they can appreciate what they have.

Agreement from other members of the group.

1: We went to see our daughter. Basically it was a family holiday - she wanted to show us as much of Western Australia as she could. I would be interested to go around the table and ask how many of us are real Tasmanians - because we're all from somewhere else.

5: You mean not born in Tasmania?

1: Yes

Group discusses what is a "local". So many migrants – or connections from other places that localism is difficult to determine.

7: One of the reasons we travel in Tasmania is to find our roots - down around the Loon and places like that.

M: How long does it generally take you from deciding you need a holiday, to actually undertaking the holiday?

10: Two or three days. (Laughter from the group)

1: Eleanor that's fine if you're only going for two or three days but if you're going further.

3: Well with fly buy points, you have to book in advance to get a ticket - In my last holiday in Hobart in the Huon though and I've already booked. We booked last February to be sure of getting a place because last year it was booked.

4: Not a lot of time - in Tasmania. Our big excursions are six months - but in Tasmania we can just go - work permitting.

8: Three months perhaps.

2: I'm a short term planner - we can go when we feel like it.

7: A short holiday in Tasmania perhaps a week - but overseas there's more involved.

5: Last year I went to NZ and I more or less booked one day and went the next. My uncle was sick - so I just had to go in a hurry. He'd passed away - so I had to be there for a funeral.

9: Our main holiday is in the winter, so we've already decided on our last holiday where we were going. Our Tasmanian holidays are more family oriented - our daughter and grandchildren our in Hobart - so we always go there. When we come back from Hobart we may go the Midlands and stop along the way.

1: We don't do things in a formalised manner - we don't plan. But we're actually now planning a trip on the Canals in France - looking at the brochures and that now. But we're not really organised apart from Perth because we flyer points you have to be organised. You just can't book - because there's only one or two sits on the plane you know.

3: I booked my holiday in Tasmania early because I have relatives that come from England every two years. And they're only here for short period of time so that's why we have to book so much in advance.

2. Reasons for participation and non participation in Tasmanian holidays

M: Why would you choose to holiday in Tasmania?

10: The heat - it's healthier here - it's cool.

- 7: Tasmania is a small island - so if you live here you can go anywhere. And we do that but if you want a change you go elsewhere. But in Tasmania, you can get somewhere quickly - it's convenient.
- 9: I go along with Bill, we live here - we go to one corner of Tasmania and where back in three or four days. I don't call that a real holiday. We can go every four weeks if we want to - it's not a big deal. Not like the mainland where you can travel 1500 km to go from one part to the other. But little old Tassie is wonderful.
- 4: Yeah it raises the expectations of the person whose travelling does isn't? When we travel in Tasmania it serves our purpose to just have a three day break. And we go to the mainland but mostly we wrap it around business. But for us and the more we've done this in Tassie we can get away and still just have breathing space and time to recreate. Yeah and on a budget.
- 5: So much variety coasts and beaches, I love historical things and Tassie's got that - and I go to those kind of places.
- 8: I like to holiday in Tasmania even if it is just for a couple of days. To see nature and that type of thing.
- 2: Yes I'm the same - I like fishing our salmon are the best.
- 1: One thing that hasn't been mentioned is that I like to take people around Tasmania and show it off. It's such a beautiful place. I also like going to the cities - dancing, shows, and to be anonymous in a big city.
- 3: Well I do but I don't consider it a holiday. I go down to Hobart quite regularly but - we often go there - we have friends up the coast so we go there. If your asking me if I'd take a holiday touring around Tasmania - No I wouldn't - I can do that when I want - its small enough for me to do what I want in a couple of days. But I still go to Hobart four times a year.
- M: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.
- 10: Restaurants.
- 3: I wouldn't pay for guided tour, not as a resident but I would pay for an attraction.
- 5: I would pay for guided tour say of Hobart, around the historic sites.
- 3: Yes I've done the walking tour of Battery Point.
- 9: Museums, entry to Parks anywhere where there's an upkeep. It's a good thing when you pay an entry fee if the tour is included in it. I'd be prepared to pay for any entry fee to places which I'm interested in. I go and see what I like. But I've lived here 50 years so I'm a bit limited in terms of what I've got to see.
- 2: I'd pay for attractions.
- 1: I'd pay for Port Arthur - we've been there twice and now the trip to Dead Man's Island is all inclusive.

Group discussion on all inclusive cost of Port Arthur - perception of value for money.

- 3: Yes you use to have to wander around by yourself and now you get all inclusive. And if you're being offered a service you pay for it whatever the service.

3. Awareness and knowledge of Tasmanian tourism products and experiences

- M: Why do you think visitors from overseas or the mainland come to Tasmania for holiday?

- 7: They don't - there's not enough publicity of Tasmania - like on the mainland - there's no perception of Tasmania.
- 2: Yes that's the same as in America - they know nothing about Tasmania - all they know about is New Zealand.
- M: Outside of the issue of publicity, why would they come? What would attract a visitor to Tasmania if they knew about it?
- 5: Clean Green Image
- 9: Absolutely
- 3: And that's what it is. The quiet peaceful country.
- 2: To escape the big cities - and quality of the food.
- 3: Yes we had friends staying last week and they found all these places on the very last day which they would have wanted to see. But they didn't know about it - like Sheffield and the murals.
- 2: Yes advertising does pay, when we were in America we met a guy who called me the "Devil Man", yeah after the cartoon character.
- 3: I have a friend in Atlanta at the moment and when they said where you from and he said Tasmania - they knew the cartoon character and he showed them a real picture of a devil and they had no idea.
- 2: Yes they need to know we've got something special here.
- M: If a friend or relative visited from the mainland where would you take them? how would you spend time with them?
- 10: There's so much to see.
- 7: The West Coast - to Hobart back through the Central and along the NW coast. I've taken visitors around in 2 days (Group laughs). And to Stanley to do some fishing.
- 2: I think it takes them at least a week to appreciate it. A fortnight.
- 1: It depends on how long people can stay. Last year we got visitors of the plane and went to Hobart straight away - two nights Port Arthur, Richmond the beautiful east coast. And they via Launceston home. And then we did day trips - like Stanley.
- 9: We stay together - we've had three or four lots of Italian friends stay - and we're individuals everybody wants to see different things. I think Europeans are fascinated by the Aboriginal experience. Why they disappeared in Tasmania and not on the mainland. And the convicts - Port Arthur you can take them for a day. They're very appreciative of the fact that our history is short. 200 hundred years is a laugh - but they appreciate we've kept a lot of what we should have kept. and the other thing like is clean, green and fresh air.
- 3: My brother and sister-in-law come out every five years now they've retired.
- M: Do you travel with them?
- 3: Yes we take them around, we went right up to Smithton and down the Pieman - they did Cradle Mountain/Lake St. Clair. Meet the ranger there - did all the national parks. Four days in Hobart and we did Port Arthur whilst we were there. Like 9 said it's the clean, green image. They'd arrived in Darwin and done a bus tour down. From Adelaide to Melbourne - to Devonport - we picked them up
- 4: The track I'd leave to last is the Midland Highway - (some group agreement). Coming this way through the Lakes - is more beautiful - the change of seasons.

- 10: Tasmania is known as the Jewel of Asia.
- 4: Yes it's the island nature - there's something about it.
- 5: When we've had visitors from NZ we've taken them to Cradle Mountain - Sheffield and we travelled with them.
- 5: Yes I think you have to travel with them. Number one they wouldn't find their way on one of our maps. And two, they need the local knowledge - to be able to find their way driving along.
- M: You play tour guide?
- 5: Yes I would take them but a different route - I'd show them different things
- 4: Along the back country of Smithton which a typical tourist would never see.
- M: How would you find information about Tasmania?
- 5: RACT
- 10: Well there are information centres in each town - one in Devonport, one in Latrobe and the like
- 3: But the government ones are never open.
- 7: Burnie -
- 9: Tourism Tasmania had offices where they actually took bookings. That was the best thing that Devonport ever had because you went there - they were travel agents who could sell you tickets. Bits and pieces of the service left but not to the same extent. It was a bad thing when that service was taken away. We used it a lot. They were local people but also they were unbiased - there was no profit to be made.
- 5: I would go to the office at Ulverstone. They have one there.
- 9: Yes they do don't they.
- 5: Tasmanian Tourist Bureau.
- 2: I would use RACT.
- 3: You find that in these places they have brochures on other places. they have brochures on local attractions. You can pick up brochures in hotels and b&bs. But we don't have anything like 9 said - like in Devonport its just pictures on the wall but no-one to ask questions.

Group discussion about travel centre - a lot tourist places have brochures - some effort to put out brochures - to share information about. Leads to a discussion about signage - poor signage - people get lost.

4. Discuss the image of Tasmania

- M: How would you describe Tasmania to people who do not live here?
- 3: Clean, green and quiet
- 1: It's a potted version of England.
- 2: Compact
- 5: Simple life. It's very much like England. We have everything.

- 9: I say to my friends go to Australia but a semi-arid continent and then come to Tasmania and except for the trees you would think your in southern Italy. Some parts of Tuscany - the outlay - the up and down of the land is like Italy. And it cool - not too hot.
- 3: But we get some lovely days in the summer - 40 degrees some days.
- 9: Yeah but that day came and past! (laughter)
- 4: The diverse country - from extreme quick climbs to rainforests, dry areas - from beach to rugged coast - variation in a small area.
- M: What do you like about Tasmania?
- 2: Its so lovely, scenery - I travelled the whole of Australia. But once we meet these Americans on a railway journey in Tasmania - and they'd travelled the whole world - they thought the scenery in Tasmania was the best they'd seen.
- 9: It's all been said
- M: What do you dislike about Tasmania?
- 3: The level of service.
- 10: Yes, all the restaurants should be rated for service.
- 2: Public toilets could be improved.
- 3: And signage
- 4: Yes but it's the lethargy - we're down in the dumps.
- Group discussion on - apathy and a lack of appreciation for what we've got.
- 10: Our food is quite exceptional. The meat, vegetables -we've got lots going for us.
- 1: Yes but there's a lack of activities on Sundays -things are always closed.
- 9: Yes but that's the same anywhere.
- 3: No, you're on the mainland and even the smallest town, you can arrive there and you will find a supermarket open - 24 hours a day. You can't do that here. We don't offer to our touring visitors the service we should.
- 9: The services we offer in Devonport - you can only offer what is viable to offer - with our limited populations businesses just do not get the customers. You've got to make a profit.
- Group discussion about opening hours –towns are like ghost towns – should be open on the weekends regardless of trade.
- 7: Yes but as much as I like tourists - I want a quiet life - so in busy times I avoid tourist places.
- 3: Yes but do you want to be a quiet little backwater or get the tourist dollar. And do you think that this State is going ahead on any other plane other than tourism?
- M: What do you like about Tasmania?
- 10: Food, climate - everything about it.
- 7: I live here - and I like it -
- 2: Everything - its a beautiful place

- 5: Lifestyle, and _____. Nature and access.
- 4: The pace and we can choose to do as we want. Relax at will.
- 9: I love the people - if you're in Rome and you ask directions they don't reply - they're too busy but Tasmanians will tell you. They're wonderful.
- 10: Yes your right - the people.
- 3: The climate, the seasons - you can live where you want in a city - its very cheap - Like 9 - I've meet lots of wonderful people here.
- End.

Launceston Group 1

Icebreaker omitted due to time restraints – group started late

- 10: My last trip to St Helen's was to the Sunshine Jazz Festival.
- 8: Well we went to the mainland to take our car. We'd never done that as a holiday before. Most of our holidays are in Tasmania, we felt this was the time to branch further a field to see something new. We saw places we had never seen. We didn't know the mainland very well - now we do.
- 3: We travelled to St Helens. We've seen lots of the mainland and been overseas - We've been rediscovering lots of places. But this time we traveled mainly for my husband's health reasons. So our main motivations were for health and to rediscover Tasmania (3 Ashdown)
- 1: The main reasons we go to the mainland is to escape the Tasmanian winter but the weather on the Sunshine coast to Harvey Bay was not very good this year. Metres of rain. We keep seeing reports of how wonderful it was in Tasmania. So it was a bit discouraging at that point - but we've been right throughout Australia - we don't go for the expense of it but to see different groups or new things as we can. We came down through Griffith and Echuca - on the new highway. So I guess we go mainly to escape the winter. I guess being retired you don't need a holiday
- 6: Probably mainly visiting children - two out of three children living on mainland - my daughter and her husband in Victoria so we just make the most of it - to see grandchildren before they grow up. I have a son Western Australia - so I have had a trip over there - so I will tripping back to Victoria quite often.
- 9: My main trip to the mainland was because I'm originally from Sydney. I'm involved in sport so I went to the opening of the new stadium. I incorporated a mini break from work. Normally I'd go on holiday for historical reasons. I like to visit places of historical significance. If there's something historical I'll go and see it.
- 5: My main visit was to the east coast of Tasmania. Because we weren't sure of the weather on the west coast we decided to go the east coast. Our friends are coming back again and were going to do the west coast. Um, so I mainly choose that area because I know it pretty well and I knew they would they would really love the beaches, you know the lifestyle down there. And I just wanted to give them a taste of what we've got we is different from the city. They really enjoyed it and it makes you feel pretty good to have taken them there.
- M: Would you have taken the trip without them?
- 5: Yes. We wouldn't have stayed in accommodation we'd have stayed with friends.
- I stayed in Melbourne with friends on the way back from overseas. Our motivation was to see something of a different culture - when we came back it was wonderful to come home - to feel so refreshed. To come home is a wonderful thing. I don't know, but I think we should keep this place free of people, so fresh air, so pristine.
- 7: We went to Perth to see my son. I've always wanted to go to Perth.
- M: How long does it generally take you from deciding you need a holiday to actually undertaking the holiday?
- 7: 2 days for Tassie but if it's an overseas trip, a couple of months, but if it's to Melbourne only a few weeks. In Tasmania 2 days.
- 8: Depends on how long you're going for. Overseas trips take passports, visas - all those things. If its a three months trip - several weeks.

- 2: Yes it depends on the length of time - in Tasmania a holiday for a long weekend - two days to a week - take Tasmania for granted - if we want to book for accommodation we actually ring and it booked out you go oh well, I didn't realise it was so busy. We went to Stanley and the place was absolutely booked out. We had to camp in our tent. So even though we think we can decide on the spur of the moment, we might not.

At the end of last holiday we start planning for the next one. We've only started planning annual holidays in the last couple of years.

- 8: If travelling on the Spirit of Tasmania which we often do, we book three months ahead to get the concessions. In November we book for say June to get the concession. It does make some difference to us. In Tasmania only a week to make up our minds.
- 3: In Tasmania, one week or two weeks. To Melbourne or Sydney a month or two to get the cheap fare. For an overseas trip, twelve months

To Melbourne, plan in advance to get the cheaper fares. If I'm going to St Helens I probably just right I'm going now.

- 5: Just Tasmania we just go now - we just turn up - On our last trip, because we only we decided the night before we went - its only a day to get back again. It depends on how far you want to travel and where to?
- 9: For some overseas trips 12 - 18 months to plan it. Obtaining various approvals can take time - uh, local holidays - we just turn up - we like to try out new restaurants because I'm in the hospitality business so we just try out new places. Make a note of it whether we go back or not. We look for good restaurants and good accommodation. Our local trips our pretty much not planned. We book some accommodation when we travel overseas, but we like to freelance. In the UK we stay with friends, so no need to book ahead.
- 7: We don't book accommodation in Tasmania - we stay with friends.

In Tasmania, the decision is spontaneous. We like new places and often just say "Lets go there".

2. Reasons for participation and non participation in Tasmanian holidays

M: Why would you choose to holiday in Tasmania?

- 8: There's lots to do in Tasmania. I go Hobart for a sporting match or whatever. But it's impossible to get accommodation in January. We wanted to go the Jazz Festival but we couldn't get accommodation. We wanted to go to Deloraine for the Fair, but we couldn't get accommodation - it was all booked out. One of the biggest draw backs. I love traveling in Tasmania, but the accommodation is difficult.
- 3: As I said before we want to discover Tasmania. Lots and lots of places yet to see. What we like the most is that there are no people. Walk for miles and not see anyone. Um, we like that aspect of it, we like the wilderness and anything out of the city. We use hotels, but we like to use accommodation close to the area so we don't have to travel when we get there. It really is a rediscovery - we love to travel.
- 5: Tasmania's just wonderful but to have the time to do it is the other thing. So much here you know, and I think everyone should go to walking club film. You might be motivated to see something here.
- 6: Tasmania is a bit underrated - I think we have everything here. Beaches, mountains and yes just everything here. The most thing I like is to go along the beach and not see another person. I think I'd choose a holiday here because you're not paying an airfare to go away. You can drive for a couple of hours, we haven't go the long distances, like in Perth if you go along the Nullaboo Plains, it might be beautiful when you get there, but all that distance, when you can get of your car in half an hour and be at the beach. The weather is also good - no cyclones, no

floods like on the mainland. Convenience, the weather and we've just got everything going for us. We've got everything in Tasmania. Mountains, country and city. A Tasmanian holiday is normally short as in weekends. But we'd go often normally somewhere. One weekend we go Lake St Clair to climb mountains with friends and the other we go to Hobart to visit children.

We went to the West Coast a couple of years ago and stayed at different hotels. The tourists when they saw our car would say "Oh you're not from the mainland - all we'd seen we're hire cars". They wanted to talk to the locals not other tourists that intrigued us. We only discovered tourists - no Tasmanians. Lots of tourists asked us questions - which we liked.

5: I did some voluntary work at Clarendon, and people wanted to talk to locals.

When we go away we want to talk to the locals and perhaps rather than guides. Guides I think are wonderful but people in the street can often be guides. I think we as Tasmanians have a lot of responsibility.

4: The main reason I'd have a holiday in Tasmania is to show visitors the place. Um probably to the east coast we'd take them.

8: We go away for 3 months each year. You've had a fill of travel by then, and at the same time we have seen a lot of Tasmania and the main reason in Tasmania, is on the mainland you travel 600 miles and see the same scenery, but in Tasmania it changes. The people we've met on the mainland and have been to Tasmania rave about the changing scenery and the short distance you have to drive. And those that haven't know so little about it. But my friends and I often say we should take literature with us so - they don't know about the Spirit. Look, I love travel in Tasmania especially the new roads down the west coast. put in by the Hydro. Past the Henty is just glorious.

9: Originally we came to Tasmania as tourists some 15 years ago. And we came to Tasmania in the worst time of year perhaps May, we were looking to move from NSW. Where I was driving 120 kms each way to work. A harrowing four hours a day travel. We came to the place, and what we first noticed was the lack of traffic on the road. The lack of distance - on the mainland, that's not the case, someone earlier mentioned the Nullabor. It's so compact here and no matter which way you go your finding something different all the time.

When we were overseas, the only thing that overseas people know of Australia, not Tasmania, Australia is Port Arthur. The old prison and that's all they think of.

We've done quite a few tours around Tasmania - all over Tasmanian incorporated with work.

M: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.

3: Everything that's available. Anyway - I love day trips, quite happy to pay for food, restaurants.

4: Food!

6: Accommodation and food - we like to eat out. If we went somewhere we'd pay for accommodation and food.

I like sightseeing rather than paying for an attraction. And we have such good food. And wine, that goes without saying.

5: When we have friends with us we pay to go into new places.

We've been to Port Arthur 5 times - but we still go with friends.

Sightseeing over Mellalca.

Paying to national parks - we love all the new parts of parks, new footpaths, signs -

A train trip somewhere -

Obviously food, going to national parks.

- 6: Food - even if I been on the Gordon Trip four times - showing someone, yeah I probably, I'm potter so I would probably hunt out the arts and craft - buy some arts and crafts.

Listening to everyone else, we have been to the Gordon - it was marvelous I like cruises, boats on the water in Hobart. You get a different aspect. And food, its a holiday if you don't have to cook.

I'll pay for national parks, and food, not necessarily, all the time. When our friends came and they hadn't been here before we paid for the lot. Which we didn't mind. What they really liked was that every little coffee shop and restaurant, there was home produce. They were really impressed with the home produce. Though they said the road signs were not easy to follow. Too many corners and signs.

- 8: I've never been to Gun Powder Hill because I think that's a gimmick. I just can't be bother going to it or paying for it. As a pensioner, things are getting increasingly expensive. It does change the way you think. There's has got to be a concession for pensioners. Or otherwise you can't go.

I think they should different things at attractions.

3. Awareness and knowledge of Tasmanian tourism products and experiences

- M: Why do you think visitors from overseas or the mainland, come to Tasmania for holiday?

- 5: Various reasons. Quite allot come to see the fauna - temperate rainforest, mines um, Tasmania is so green, it motivates them to come. For fishing and things like that. Special tours.

- 3: A lot of people get here and think they're going to see the place in two days and their not. People on the mainland should be told to come here for a fortnight or three weeks.

- 7: Just a bit longer, we get people into our workshop and the people say they should be here longer only here for three days.

- 1: One of the main problems is they look on a map and compare the mileage on a NSW map to Tasmania. But they come here - we've got the rivers, the mountains, the lakes, within an hour from the main cities.

- 2: I think they come just because we're different. They come on business and bring their families. They come on their honeymoons. But there again they don't allow enough time.

- 8: People ask how to get to Tasmania - there's very little publicity on the Spirit. Except the boat race. Hobart is colder than Launceston, and that's the temperature that gets promoted on the mainland. All they know of Tasmania is Hobart, Port Arthur and they don't realise anything else. A lot more publicity about Tasmania. I really think as the boat comes out of ____.

- 1: I don't think they do!

- 8: Yeah but wilderness visitors come for the wilderness, all around Tasmania they come for different reasons. To escape the weather I know people from Queensland who escape the heat. They come to experience a nicer temperature. It's very expensive for people to come here. It costs a lot.

- 9: There's nothing in Tasmania for the 18-25 age group. Not a thing. Promoted for a place for families, its great for 45and above. But there's nothing for the single person. Only wilderness, going to the bush

M: If a friend or relative visited from the mainland where would you take them? how would you spend time with them?

No we get rid of them (joke) No I take them everywhere. Wherever they want to go. It depends on whether they want to do day trips or for a week? We'd take them to Hobart, and then do day trips. Take them to the East Coast, what ever and wherever

- 5: We took them to Devonport, Mole Creek and the Wildlife Park there, Devils Gullet, the mine trip, the East Coast - we went to a number of wineries. We went to Coles Bay and they really loved it there. They really enjoyed the food here. Especially the Strawberry farm.
- 8: It depends on the time. I'd show them the West Coast and the NW coast, and then take them to Coles Bay, not only drive in and see it but walk to Wineglass Bay. We'd go to Richmond and Port Arthur. If they come to Tasmania its worth going to Port Arthur.
- 2: Because my husband and I work, it's not always an option to go with them but my husband takes friends fishing. Some of them come with their wives. We had friends that were over a couple of weeks ago, and we took them to Grindleworld. Which they thought was marvellous. We had plans to take them to Table Cape, Ulverstone we had lunch at the fish restaurant and then afternoon at the Strawberry Farm but we only got as far as Sheffield, the murals. Yes and the North West Coast is so diverse. Where they come from in NSW is flat and boring just the one crop, so we have the diversity so we showed them the farms on the NW coast. It also depends on their interests because we've got so much the history, the mountains, and Salamanca market
- 6: I've had my daughters in-laws from America and they stayed with me. I got them do their own thing. I sent off in my car, but I did go with them to Coles Bay. I was in Hobart, Salamanca Market. I had friends when the Deloriane Craft Market was on so I took them there. I wouldn't do any bushwalking - though I would take them. I take everyone to Coles Bay and tell them about.
- 3: We generally take our friends to Freycinet, Cradle Mountain, Gordon River, Henty River, the Lavender Farm. Grindlewald - everyone I've taken has enjoyed Grindlewald as something different. Sheffield,

Grindleward is really a go and see.

Gunns Plains, I don't think people know.

We try to take time off to take people around. We take them up the Gordon. All our Parks are terrific. Some of the buildings are really lovely too.

We have a holiday house on the NW coast so we take them there.

- 9: About seven years ago my family came down. They arrived at the airport we no itinerary. The travel agent had basically given them the air tickets, and because they were staying with family they left them to it. Didn't bother about accommodation or car hire. We didn't know what to do with them. So we worked out an itinerary. We took them everywhere, Cradle Mountain, all up the West coast, and they were absolutely flat out with the tour and the good thing was that we saw places we hadn't seen before. We forced into a situation where we going and so it worked out well. They were with us for eight days and then we sent them south. They went to Port Arthur and Hobart. They were limited for time so they were here for 14 days and the travel agent didn't do for them. So I enjoyed taking them.

M: Where would you go for information on a holiday in Tasmania

- 1: That's the Gateway isn't it - the old tourist bureaux. Same as the one down in Hobart.
- 2: Devonport or Burnie. I wasn't aware whether they had them or not.
- 8: A lot of areas have information centres. When we headed to East Coast we stopped at the Campbell Town information centre.

- 5: They can't tell you waits all around Tasmania though - theirs only one down in --- and the one in Hobart
- 6: Well RACT we book through them.
- 8: I've never used the bureau but aren't they the Gateway?
- 2: Gateway I think of Devonport? I thought they were tourist bureau in Devonport - because Devonport is the gateway. And then they adopted it throughout Tasmania or is privatised, has it been privatised?

I didn't know it was called the Gateway. I call it the tourist bureau. You get Travelways from there. Accommodation and stuff like there. But most people go to the RACT. They go because it's free.

- 7: The Huon has a very good one. Maps and tips about the area. Little coffee shops also have lots and lots of brochures.

4. Discuss the image of Tasmania

M: How would you describe Tasmania to people who do not live here?

- 1: Best place on earth
- 8: Whenever I travel overseas I always rave about Tasmania. I'm Tasmanian not Australian. It's got everything here.
- 4: I met an American woman and her first impression was the Tassie Devil, it does exist. And she was absolutely amazed that the Tassie Devil was real. The show based on the Tassie Devil what's it called? Tassie Devil in America.

Group discusses Taz the Devil and the 'unrealistic' perspective of Tasmania.

- 2: But we're also known for our clean, green and food
- 1: The changing scenes over short distances is one of the most differences for mainland people. On the mainland, on the main roads its pretty boring, except for the Hinterlands and Gold Coast. The Great Divide etc, which may be more extensive than Tasmania but Tasmania we have the changing scenery.
- 7: Yeah and its compact.
- 9: Paradise and God's Country side by side.
- 3: Four seasons in one. And cheeses, and wines, raspberries,
- M: What do dislike about Tasmania?
- 9: Prices, far over what it should be especially in the hospitality industry. No reason why we should be disadvantaged we're just being ripped off.
- 6: The road signage. The road signage doesn't conform with Australia, a lot of signs are too close to the turns. And our drivers are ---- confusing. (Collective laugh)
- 4: Indicators are an optional! None (Group laughs)

I think the cost of food is a real shame – we're penalised for the water.

- 6: Signage in the country. In the country signs are pretty inadequate. The sign to Sheffield is shown tens times, but signs on the best routes are not there. Its like the signs are for the local people not the visitors.

- 2: Road conditions - our roads are not good.
- 8: Yeah our roads - inconsistent road speeds, You can drive down to Hobart at a 110 but the Tamar 100 surely, you shouldn't be doing a hundred. It should go back to 80.
- 5: I hate the services - flights in and out of the State are appalling. Once your here they make it hard to leave!

General agreement, several comments about the boat and the wait to get a ticket. Perceptions of barrier of water and penalised through pricing and being able to leave the state.

- 3: Sometimes people in Tasmania resent that we have people from other states. Other people are perceived as taking Tasmanian jobs.

No group comment

- M: What do like about Tasmania?

The quiet easy life, no rush like in Sydney or Melbourne. you can go home for lunch. Quiet country side.

- 8: I support that one. Its so easy - no traffic. I think its so easy to live here - no different to Dubbo or somewhere like that.
- 3: Coming back from Melbourne to retire was great. We came for the family. But its quiet, we like the lifestyle.
- 2: Sometimes I think we don't appreciate what we've got. The quiet life, the ease, to not have to rush all the times.
- 4: It's such a pity that our young, have no work, most families have lost someone to the mainland. There's not too many people I know who have not lost someone to the mainland.
- 2: The worlds getting smaller though.
- 4: Yes they'll probably come back and retire.
- 2: Tasmania might become a haven for retirees. It probably is now (group laughs).
- 9: But there's plenty of opportunity for anyone who comes here. I came later in life and have a part-time and full time job. There is opportunity.

End

Launceston Group 2

Icebreaker: Where did you take your last holiday?

- 6: I went to Canberra, prior to going up north for 2 months. We were heading for Bundaberg
- 8: We travelled in Tasmania during March
- 3: I spent 7 days at Cradle Mountain – I went fishing
- 1: I went to Surfers Paradise for a week and then over nighted in Melbourne.
- 5: Surfers for 12 days
- 2: A friend had a wedding in Hobart so I went down, and I spend some time with family as well I have a daughter in Hobart so we did both.
- 4: Sumatra and Malaysia just for something different (group laughs)
- 7: Melbourne
- 10: Tullah - Tassie
- 9: Melbourne

1. Explore the motivations of the Tasmanian travel market.

- M: Thinking about your last holiday, did you travel for pleasure, escape, relaxation, to be with friends and relatives etc?
- 4: If I can come in. I had not been to South East Asia, only Thailand on short trip So this one was just because I had not been to Asia for any length of time. I've been overseas eight times, including Brazil three times. Now I can say I've been there.
- M: So was it to see something new? A new insight?
- 4: Yes, but what struck me was the beauty of the countryside in Sumatra. I went to Bucadindi which is only the size of Launceston, got beautiful buildings and very nice locals.
- 10: Well we went to Tullah in April with friends, because we'd heard it advertised. They wanted to try the Rosebery Golf Course. So we went and had a relaxing weekend. Because we'd heard it advertised and we love the _____. We hadn't seen that part of the West Coast and we had a lovely time.
- M: So it was for relaxation?
- 10: Yeah, we went walking and relaxing, Drinking!

Group laughter.

- 9: My last holiday was to Surfers, lying about the beach having a good time. Nightlife, the beaches.
- 6: Well, I went to get away from the cold a bit. And to visit relatives. I have four grandchildren on the mainland and one son. And a sister. So you know to tour around a bit.
- 8: Well I went to Bali to escape.
- M: Directs question at Participant 5.

- 5: More or less the same reasons as everyone. We went to get away and head for the warm climate. We're both interested in bowls and we went to visit the bowls clubs and had a real good time.
- 3: The very last one was to get away for a little while.
- 2: Well our last holiday was in Melbourne and we went over for a relative birthday. But I went to football as well. My son lives there.
- M: So was your primary motivation to see family?
- 2: Yes, the birthday.
- M: How long does it generally take you from deciding you need a holiday to actually undertaking the holiday?
- 1: In Tasmania or anywhere?
- M: Either

Collective response - a couple of days.

- 2: No - to the mainland a lot longer, especially if you want to use your frequent flyers.

Collective response: you can't

- 1: Takes a longer time to plan and book for the mainland.
- 4: Off the cuff, I like Queenstown sometimes and then Coles Bay. To me, so a couple of hours. Two destinations which are so unlike each other and then my fancy may be Queenstown one weekend, then four or five weeks later Coles Bay.
- 5: Generally speaking two days.

Collective agreement

- 6: I have to agree with Jamie, we're so fortunate in Tassie that we have places like that. If it was the mainland you wouldn't be able to move there. It's a long way to Coles Bay but when you get there it's well worth it. Same with Queenstown. We started planning for a trip to Queenstown. This winter instead of going away we want to go around Tasmania to see the River at Queenstown and do all that type of thing.
- M: So you've started planning already?
- 6: We have decided that now and it will take us twelve months to do it right. We like to plan ahead. My husband is one for itineraries - so day one and two and so on.
- 1: Every year for a month we go away, so we plan that. Christmas holidays and so?
- 3: In Tasmania, 3 to five minutes. (Laughter). I do a lot of fishing around Tassie so you have to listen to the weather.
- 7: It depends if you have to rely on accommodation, if you have to rely on accommodation then it takes longer. If you're going to Strahan or somewhere you have to book. You have to plan ahead.
- 10: If it's a walking trip,

Collective discussion about planning for a holiday on the mainland requiring more booking than Tasmania.

2. Reasons for participation and non participation in Tasmanian holidays;

M: Have you thought about/considered taking a holiday in Tasmania, but have not done it?

No response

M: Why would you choose to holiday in Tasmania?

8: To get away for a couple of days without having to travel far.

10: We holiday in Tasmania. Usually on the Mainland we plan. The kids have grown up now - so we go to different places.

1: I've got a daughter in Hobart so we go there really frequently.

4: I lived in Brazil for four years and since I've come back I've almost discovered or rediscovered Tasmania. Like Queenstown which I saw through completely different eyes. In fact I found beauty in those desolate hills. Another reason is you can see so much in such a short area in Tasmania. Every 20 km. or so you see a different scenery.

Collective agreement.

7: I think that holidays in Tasmania we probably travel in a group. In October four or five of us are going to Cradle and stay and walk. So I find in Tassie when we go away it's different. It's so relaxing you don't have to do much to enjoy it - reading a book, eating - it's so relaxing.

An affirmative response from group.

6: We've got relatives in Hobart so we go down there we have somewhere to stay. We like to go to St Helens, Bridport - mostly reasonably close. We haven't been further afield - we thought about it. And we're going to that this year - see all the places you've been about. We've been to Queenstown and Strahan but years ago.

8: I travel in Tassie because it's familiar and I love the changing scenery.

Group discussion on Tasmania's beauty and accessibility.

M: What type of holiday activities other than accommodation would you pay for if holidaying in Tasmania? visiting historic sites; guided tours; visiting attractions; guided walks etc.

1: Nothing actually nothing. Groups laughs.

2: Food and entry to attractions.

10: I wouldn't pay for Penny Royal. I'd pay to go to the National Parks. And we love the parks. We go down to Port Arthur - we've got a shack down there. Probably the same as you - there's not a lot of attractions I pay for. There's not a lot I haven't seen.

5: My sentiments are the same. There's not a lot of places that you really have to pay for? Um, everything is more or less free - if you want to go to the Casino.

The group picks up on the theme and discusses the value of paying for something you've already seen.

1: Tasmania it doesn't really have a special attraction. Like the Gold Coast - Sea world or Movie world. You don't have to pay in Tasmania though - like walking and so on - it's free. Something really special I'd pay for.

4: Some of the best things are free but what I eat and drink is a very integral part of the trip - one of the best things about travelling is to find some little pub - have a counter meal - I remember going down the Great Explorer Highway and we ended up at the Waratah pub. Managed to get a nice pie - and that sort of added to it - I think food and drink add to the mixture of it all.

- 2: At this stage, I've seen everything in Tasmania - as for things like Port Arthur - it doesn't appeal to me. But I love the rivers and lakes.

Agreement from the group

- 9: Food I suppose - and if a mainland band come over I'd see them. Sporting things as well - the AFL matches in Hobart we went down then.

- 6: I just like to say that I was fortunate enough to go to Lake Pedder before it was flooded. And that was a fantastic trip - we landed on the beach. We're also part of Probus and my husband and I go on long bus trips. We went to see the tulips, up the West Coast and you can just sit and relax. Not have to drive, not having to worry - so that's a great way to see Tasmania.

- M: You pay for that?

- 6: Oh yes, the same driver we have and he takes us to different places.

- M: Directed question at participant 3.

- 3: Entertainment and sport - football. Entry to competition like fishing that's about it.

3. Awareness and knowledge of Tasmanian tourism products and experiences

- M: Why do you think visitors from overseas or the mainland, come to Tasmania for holiday?

- 3: I don't know why they come - but what I do know is that think they can do it a couple of days.

Agreement and laughter from the group.

- 4: The Englishness of Tasmania - I think people like Tasmania - they compare it to the British Isles. Similarity - and the connection from the past - that goes along way in peoples psyche. We are Australia's "Emerald Island" in a way.

- 5: Not the hustle, bustle of the big cities - and its more relaxed and it doesn't take a long time to get anywhere. Umm.

- 6: I actually came here for a holiday 47 years ago and never went back to Sydney. I'm a tourist from way back -

- 1: We're so different from the mainland.

- 2: It's very difficult to say - they come because it's the only place they haven't seen. I think its word of mouth that brings them here. They here good things - the food and that. They recognise the beauty - it does look good.

- 10: We had some people over from Hong Kong last year and they couldn't believe the space - houses on blocks of land - they keep saying - they couldn't believe.

- 3: I think the travel time they can't believe - the scenery and distance to see it.

- 10: They come because they find the place delightful - they don't come for the nightlife - its a different type of holiday. Most people that come like the quiet side of life.

- M: If a friend or relative visited from the mainland where would you take them?

- 10: To the West Coast and North West Coast.

- M: Any particular place?

- 3: The Gorge - Coles Bay.

- 2: It all depends on what they're interested in. If they're from the mainland we'd probably take them to the Gorge and not much further afield. But if they were from overseas I'd take them to the Wildlife Park and places like that.
- 4: I enjoy taking people around farms - around Cressy - so that's something I enjoy but apart from that I'd take them to Queenstown and Coles Bay because as I said before there's so entirely different. In my opinion both incredibly beautiful. I'd try and travel with them if I could.
- 1: It doesn't matter if you travel with them. I'd sent them to wineries and museums. And you can talk about when they get back. In Tassie, they see such an enormous amount without leaving home base. Occasionally we'd go with them but it's so accessible it's not always necessary.
- 5: I'd take them up the East Coast and all around Hobart. Back up North or the West Coast.
- 10: We'd travel with them if we weren't working and had time. Um, we take them to Eaglehawk Neck - we love it down there and every time we go we find something different. We'd take them to the Gorge, we'd definitely eat up there especially we overseas visitors. So we like the East Coast and Stanley and the Nut - summer up there. I like Paradise and Sheffield.
- 3: I'd go with them to North East and west - sometimes Hobart,
- 10: I find everyone wants to go to Salamanca - that's what's being advertised.

Group agrees.

- 8: Mainly the east coast and north west coast.
- 6: Well we have friends and relatives - go up around George Town, Bridport and Scottsdale. We had one - he wanted to stay at the Pub in the Paddock. He found it a beautiful - we have gone with visitors - but we haven't taken anyone down the north west coast. We've taken people to Port Arthur and restaurant and attractions at Bicheno. They found that interesting. We've been to Gunns Plains.
- 9: I don't get many friends or relatives visiting. All my friends are younger and I may take them to the Casino in Hobart there's not really a lot to choose from. But places to eat and other things.
- M: Any specific attractions?
- 9: Wineglass Bay it's a beautiful walk.
- 7: I could do that walk forever - I love that part of Tasmania.

Group discussion on wineglass bay - Collective agreement on beauty.

- 8: And the Botanical Gardens
- 10: I love the wharf on New Years Eve - all the people, and food. It's fun.
- M: Where would you go for information on a holiday in Tasmania
- 1: The tourist bureau

Yes - collective agreement.

- 8: I think it's word of mouth, recommendation - you must go here and you must go there. You know.
- M: If you were in Hobart or Burnie where would you go for information on travel.
- 1: At hotels, reception normally have something on the place.
- 2: Information boards - on the side of road are useful

- 6: In Tasmania we are also very helpful - go here and there. You've got to see this and that.
- 7: Most places have tourist information we've found at places in Sheffield and that small towns have information signs about Salamanca and Hobart so we use those.
- 9: Publications and brochures. Also the internet - there's information on just about anything. I'd type in a name and go from there.
- M: For Tassie as well?
- 9: Yeah just about anywhere.
- 6: I'd go to Gateway and say we needed information - we're going here we're going there and need information. Accommodation whatever.

4. Discuss the Image of Tasmania

- M: How would you describe Tasmania to people who do not live here?
- 4: Clean and Green
- 9: Quiet and slow - relaxing
- 8: Natural and safe
- 2: You reckon?
- 8: Well safer than the mainland.
- 6: A lot of hills,
- 2: Naturally beautiful
- 5: The accessibility of Tasmania - we have it all and it's all readily accessible. All beautiful and accessible.
- 10: There's not a lot of life going on but it's peaceful. Quiet and restful - no razzamatazz -
- 6: I say I came for a holiday 47 years ago and never left. It's that good. A lovely place to live.
- M: Anything you dislike about Tasmania or about living in Tasmania or the State itself?
- 10: Trying to get out in a hurry! Group laughs several agreements.
- 2: When you want to go and you're in a hurry you can't always get a flight. To get a good fare you have to book way in advance so you can't just say I want a holiday and get it. It makes life difficult to get off the place.
- 8: Everywhere else in Australia they can get in a car and go - we can't - that bit of water - same with people coming to us -
- 10: I hate the way we're penalised - where we're beholden to the boat - the boats a classic - we're stranded. I also get a bit low about the negativity that goes on - there's always someone objecting to development.
- 4: Woodchipping - I shouldn't wave a banner but I personally feel strongly against it. Even if you look at the aesthetic point of view I really wonder how much we make from it? Does it cost Tasmania more with infrastructure such as roads and the like? The Liffey Valley (several agreements from group)

- 1: I dislike the lack of development - people are always slowing development.
- 8: I don't agree - I think people complaining about lack of progress - Tasmania is seen as a backwater - but its what I love. People always come back. They know what's good.
- 3: But food and that costs more here.
- 6: When you travel around the mainland the prices and availability of goods shows just how much we have to spend in Tasmania. Access to the things that the mainland have and we don't get like craftwork - fabrics and the like. That bugs me a bit. Like Lincraft - they don't consider - like population wise that we're worthy
- 9: Yeah with bands and things like that - they don't come over. I went to the Queensland for the Big Day Out and they don't do it here. So it's why I went.
- 7: Our low population -
- 8: Yes but there's always a positive to these negatives - like no crowds - people come for the slowness of our state.

Group discussion on that 'piece of water' as a barrier.

- M: What do you like about Tasmania?
- 9: The people - you go to a country town and you feel comfortable - the people are friendly.
- 3: Lifestyle
- 10: The convenience
- 8: Our fresh food and produce.
- 6: I like the four seasons. And the people and I love coming home to Tassie
- 10: The lifestyle - if you've got the money its a good place - but otherwise it could be depressing. I don't like the cold but the lifestyle is good.
- 7: The barrier of water has keep the country here - we haven't lost it. We've got the country and the city.
- 4: I think it's interesting a lot of people leave Tasmania especially after University - go to the mainland and often return. They return often very happy with the choice. Friends of mine have moved back - and there happy - the price of their house has given them a lifestyle. Compared to Melbourne. As far as the winter is concerned we have beautiful sunny days - and frosts are the best - I love the weather in Tasmania. I left Tasmania and now I'm older I appreciate it so much more - I love my wine and woman to mature.

Group laughs

- 7: The cost of real estate and travel times - it takes me fifteen minutes to drive to work whereas in Melbourne probably an hour. I couldn't stand that again. Tassie offers a good lifestyle.

Agreement amongst the group.

End

Please take the next five minutes to complete the following questionnaire

- 1 Have you taken a holiday in the last 6 months in any of the following places?

Tick one box

Tasmania ☐
Interstate ☐
Overseas ☐

- 2 What time of the year do you most prefer to take holidays?

Tick one box

November- December ☐
January - May ☐
June - October ☐

- 3 What was the main purpose of your last holiday?

Tick one box

Honeymoon ☐
Sports Event ☐
Major event/festival ☐
Visit Friends ☐
Visit Relatives ☐
Other (please specify) ☐

- 4 What is your age?

Tick one box

15 to 20 ☐
21 to 30 ☐
31 to 40 ☐
41 to 50 ☐
51 or over ☐

- 5 Sex

Tick one box

Male ☐ Female ☐

- 6 Would you be interested in participating in an individual interview regarding your holiday patterns?

If YES, please write your name here