



Regional Spotlight

Is destination marketing missing the mark? A Fraser Coast segmentation analysis

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ABSTRACT

Limited research has been undertaken to ascertain whether researcher-driven segmentation strategies match the types of tourists targeted by destination marketing organisations (DMOs) in their marketing plans. This omission provided the impetus for this regional spotlight. Based on a sample of 634 self-drive tourists to a regional destination, three valid segments were produced. Comparison of the segments identified using the researcher-driven approach indicated significant differences in age, travel party composition (TPC) and origin. DMOs may be missing the mark, given that the researcher-driven approach identified the proximal mid-aged family segment as the primary segment, even though this segment is not being prioritised by the DMO.

1. Self-drive tourism and destination marketing

Owing to the wide ownership and usage of motor vehicles amongst consumers, self-drive tourism travel is increasing worldwide (Liu, Zhang, & Nie, 2012). For example, the number of registered motor vehicles in Australia has increased from 15.3 million as of 31 March 2008 (Australian Bureau of Statistics, 2009) to 19.2 million as at 31st of January 2018 (Australian Bureau of Statistics, 2018). Further, in 2012, the majority (88%) of Australians used a passenger vehicle to travel to places that were not work related (Australian Bureau of Statistics, 2014).

Self-drive tourism involves mechanically powered, passenger-carrying modes of transportation (e.g. automobiles, motorcycles, four-wheel drive vehicles, recreational vehicle travel and caravanning) (Prideaux & Carson, 2011). It requires a person to drive a privately owned or rented vehicle from their origin to a final destination point (Prideaux, Wei, & Ruys, 2001). This travel can be domestic, such as short-break excursionists (e.g. Chandler & Costello, 2002; Thrane, 2015), or international, such as long-stay “once in a lifetime experience” tourists (e.g. Becken, Simmons, & Frampton, 2003; Engstrom & Kipperberg, 2015). Although self-drive tourists enjoy their individuality and flexibility when travelling (Fjelstul & Fyall, 2015) and it may be the only method of transportation available to access destinations (Carson, Prideaux, Coghlan, & Taylor, 2009; Taylor & Prideaux, 2008), these tourists are a heterogeneous cohort (Hardy, 2003; Olsen, 2003).

Despite insight into the differing characteristics of self-drive tourists

within academia (e.g. Prideaux & Carson, 2011; Thrane, 2015), limited research has been undertaken to determine whether self-drive tourists match the types of tourists targeted by the relevant DMOs. Furthermore, identifying whether a segmentation can be validated based on target marketing criteria (measurability, accessibility, substantiality, actionability) is largely unknown in the literature. Although retrospectively knowing who self-drive tourists are will provide valuable feedback to DMOs, this process alone is ineffective for planning or identifying which tourists are likely to be profitable (Tsiotsou & Goldsmith, 2012). To provide insight into this phenomenon, an examination into both DMO and researcher self-drive tourism segmentation was conducted at the Fraser Coast.

2. Fraser Coast

Fraser Coast, is a regional destination located approximately 300 km north of Brisbane (a 3-hour drive via the Bruce Highway), the capital of Queensland, Australia.

In 2016–17, the tourism industry contributed an estimated AUS \$413.4 million to the Fraser Coast regional economy (12.7% of the region's gross regional product), supporting approximately 4400 jobs (Deloitte Access Economics, 2017). The destination is unofficially known as the whale-watching capital of Australia and the opportunity to see whales is a key Fraser Coast experience (Tourism Australia, 2016).

Drive tourism's strategic importance to the Fraser Coast cannot be

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Table 1
DMO vs. Researcher segmentation approach.

	DMO	Researcher
Key experience(s)	Whale watching, Fraser Island	Whale watching
Primary segmentation variables	Lifestage, origin	Age, income, interest, knowledge, length of stay, origin, past experience, TPC
Secondary segmentation variables	Length of stay, expenditure, travel frequency	
Data collection method	Industry insight	Self-administered questionnaire
Data analysis method	Industry insight	TwoStep cluster analysis
Number of segments	5	3
Target segment(s)	Older families, young families, empty nesters	Proximal mid-aged family

underestimated as it represents over three-quarters (78%) of tourists to the region (Tourism Research Australia, 2017). Both the regional and state DMOs define a self-drive tourist as a visitor who uses some form of vehicular transport as a mode of transport to reach their destination, where their main purpose of visit is leisure (Queensland Tourism Industry Council, 2017). The Fraser Coast is actively part of the Queensland Tourism Industry Council's Drive Alliance Committee. This alliance is tasked with implementing the Queensland Government's *Queensland Drive Tourism Strategy 2013–2015*, which encourages tourists to travel via car to regional destinations (Queensland Tourism Industry Council, 2017). Within this documentation, the development and implementation of a major marketing plan targeting self-drive tourists within a 400 km drive market radius is listed as the region's first tourism priority in the most recent marketing plan (Tourism and Events Queensland, 2017), further justifies self-drive tourism's marketing importance to the region.

2.1. DMO approach

The destination's marketing plan (See Table 1), developed by the state DMO in consultation with local tourism consultants and the regional DMO, defined three priority target markets. These segments were derived to facilitate achieving the region's most important strategic marketing goal of developing and implementing a major marketing and public relations campaign, targeting domestic markets (including 400 km drive market), supported via ongoing development of the destination's hero experiences (Tourism and Events Queensland, 2017). The first target market is older families (families with no children under five year old) in regional Queensland and Brisbane (radius of 400 km) that will stay for approximately seven to 14 days at the Fraser Coast. Young families (families with children under five years old) from the same geographic location are the second target market. These tourists will spend between four and 14 days at the destination. Empty Nesters (aged over 50, no children) located in Brisbane, Sydney and Melbourne (domestic), and United States of America, Canada, Europe and New Zealand (international) are a secondary target market that will spend little and stay longer (more than 15 nights) at the Fraser Coast (Tourism and Events Queensland, 2017).

Table 2
TwoStep cluster analysis solution.

	Proximal mid-aged family (30.1%)	Elderly domestic couples (31.5%)	Young European couples (38.0%)
Age (1.00)	35-44 (38.9%)	55+ (80.0%)	< 35 (75.6%)
Origin (0.71)	Queensland (< 400 kms) (53.9%)	Queensland (< 400 kms) (28.0%)	Europe (71.7%)
TPC (0.56)	Family (61.1%)	Partner/spouse (75.0%)	Partner/spouse (44.8%) + Family (26.6%)
Length of Stay (0.38)	> 3 nights (40.9%)	> 3 nights (39.0%)	2-3 nights (66.4%)
Past experience (0.08)	Yes (26.9%)	Yes (20.0%)	Yes (5.0%)
Knowledge (0.03)	\bar{x} = 4.46, s = 1.49	\bar{x} = 4.47, s = 1.46	\bar{x} = 4.00, s = 1.50

Knowledge (1 = lowest, 7 = highest), \bar{x} = sample mean; s : standard deviation. Importance levels between (1.00 and 0.00) are listed after each variable.

2.2. Researcher approach

Tourists that participated in a guided commercial Fraser Coast whale-watching tour represented the research cohort. A convenience sampling method was employed. Here, tourists completed an anonymous self-administered questionnaire whilst on the 45 min return leg back to the shore after their whale-watching experience. To qualify, a respondent needed to be over 18, had travelled to the destination by a motor vehicle (driver or passenger), and they needed to be a non-resident. Responses were collected all seven days of the week to ensure that weekend domestic tourists which represent a large domestic cohort (Tourism and Events Queensland, 2017) did not bias the solution. To maximise variation in responses, data was collected across high and shoulder periods and on multiple whale watching vessels, which varied in passenger sizes. Items that represented key drive tourism criteria identified within the literature formed the basis of the questionnaire (see Table 1).

In total, 687 tourists who had participated in a whale-watching experience completed a questionnaire. Fifty-three incomplete surveys (7.7%) were removed which left a valid total of 634 responses. Most respondents earned an annual household income in excess of AUD \$100,000 (27.9%). However, due to its high percentage of missing data (15.7%), income was not included in further analysis (Hertel, 1976). TwoStep cluster analysis produced three segments. As interest in whale watching created no statistical significance (0.00) in the segments, it was removed. Cluster analysis was re-run on the six remaining variables. Three valid clusters were produced. Age, origin and TPC were the most important distinguishing variables (see Table 2). *Proximal mid-aged families* was differentiated based on being mostly from the target region (close < 400 kms), middle aged (35–44) and travelling as a family (Cluster 1). *Elderly domestic couples* (Cluster 2), travelled with their partner/spouse, are older (55+) and from different regions through Australia. *Young European couples* were young, European and travelled with a partner/spouse (Cluster 3).

3. Destination marketing: Missing the mark?

Based on the research findings, several similarities between the DMO and researcher-driven approach are acknowledged. Geographic segmentation usage in marketing the Fraser Coast cannot be underestimated considering that many self-drive tourists within both

approaches are within the targeted, domestic region (< 400 kms) of the DMO. Proximal tourists are considered the most accessible and potentially likely to return due to lesser time or financial constraints than international segments (Perdue, 1996). Further, employing the demographic variable of lifestage (or TPC) indicated that drive tourists of all stages of life could be categorised which is relevant to both the DMO and researcher segmentation approaches.

To further mirror the family friendly tourism approach currently promoted within the region (Fraser Coast Regional Council, 2018), it is suggested a focus on couples and groups (e.g. families and friends) with young children be considered by the DMO as the priority segment (proximal mid-aged families) to fulfil their strategic goal of developing and implementing a major marketing and public-relations campaign, targeting domestic markets (including 400 km drive market), supported via ongoing development of the destination's hero experiences. The proximal mid-aged segment is not specifically targeted by the DMO, suggesting the current DMO marketing approach that focuses on three priority segments may be missing the mark. Whilst proximal mid-aged families is slightly smaller than the other two segments, the return on investment for attracting proximal mid-aged families is high (substantial). This segment represents measurable characteristics of the priority drive market segment focused upon by the DMO (e.g. proximal, aged 35–54 and family travel). With continual marketing campaigns incorporating a variety of media (e.g. billboards, television) into regions within a 400 km radius, tourists can be reached (accessible) and may be motivated to travel to drive to experience a Fraser Coast vacation at a family friendly destination (actionable).

The researcher approach determined that self-drive tourists stay for approximately two to four days, indicating a focus on short stay is warranted in the DMO strategy. Whale-watching interest was an insignificant segment differentiator. Consequently, fishing, swimming or relaxing on the beach could be further marketed as secondary experiences (Tourism and Events Queensland, 2017) by the DMO to extend drive tourists' visitation length. While age and the TPC of respondents varied, the majority of tourists travelled from within the targeted region which represents a 400 km, comfortable drive identified in both theory (Pike, 2009) and practice (Tourism and Events Queensland, 2017), which can be targeted through current marketing strategies.

4. Opportunities for future research

Largely due to the importance of self-drive tourism for regional destinations within countries such as Australia (Carson et al., 2009), New Zealand (Becken et al., 2003) and Norway (Fjelstul & Fyall, 2015), it is suggested that to improve generalisability, future research could be conducted at other regional destinations employing the same approach applied within this regional spotlight. Specifically, the researcher-driven approach outlined in this study could be compared with current DMO approaches to identify whether destination marketers may be missing the mark with their current destination-marketing approaches. This process may also determine whether age, TPC and origin of drive tourists are the most significant differentiators of drive tourism segments across contexts. Although financial (e.g. income, expenditure) items can be useful to justify DMO marketing approaches, they can be problematic to measure consumption for short-distance travel, as expenditure (e.g. fuel, accommodation) may happen in locations separate from the destination (Flognfeldt, 1999). To provide some financial scope, future research could employ an online questionnaire where post-experience drive tourists are forced to complete a financial question (expenditure) before answering other items.

Appendix A. Supplementary data

Supplementary data to this article can be found online at <https://>

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