

OUTBACK WAY CONSUMER DEMAND AND EXPECTATIONS RESEARCH

KEY FINDINGS

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Painted Dog Research



WESTERN
AUSTRALIA

The Outback Way

The Outback Way runs through Central Australia from Laverton (Western Australia) to Winton (Queensland) via Alice Springs.

Currently, over 1000kms of the 2700km route are unsealed.

The current state of sealing and distances between service provision along the route is presented at the map on the [Outback Way website](#).



Key Findings

Introduction

- In February 2022, the Federal and State Governments committed significant funding to seal remaining sections of the Outback Way. The 2700km road runs from Laverton (WA) to Winton (QLD) via Alice Springs, and currently over 1000kms are unsealed.
- In May 2022, Tourism WA engaged Painted Dog Research to assess the potential tourism benefits and consumer expectations regarding the sealing of this road as a possible self-drive tourism route.
- Stakeholder consultation was conducted in May/June 2022 with government/tourism industry representatives, and members of the Outback Highway Development Council
- Consumer research was collated in July/August 2022 through an online survey of 2010 respondents from WA ($n=808$), QLD ($n=400$), NSW ($n=401$) and VIC ($n=401$).
- The outcomes of this research will be used by Tourism WA, other government agencies, tourism operators and developers to inform decision making processes associated with marketing and future infrastructure planning to support the tourism offer on this significant route.

Awareness and Current Usage

- Awareness of the Outback Way is relatively low, with only around 1 in 3 (**34 per cent**) aware after being provided information about the route.
- Awareness is highest among those living in Queensland, among those with highest household incomes, and among older Australians.
- Over 4 in 5 (**81 per cent**) have travelled at least one iconic Australian road trip in the past, however less than 1 in 10 (**9 per cent**) have previously travelled the Outback Way.
- Current users typically travel with a partner/as a couple (46 per cent) or as a family (24 per cent).
- **70 per cent** of these trips have been 2 weeks or less, indicating a low proportion of travellers undertaking long-term road trips.
- Almost 3 in 5 (**59 per cent**) of those who have taken a trip along the Outback Way indicated they have only done so once.
- More than 1 in 2 travellers (**53 per cent**) plan most things before they travel. Of those who have travelled the Outback Way before, most booked between 1-6 months in advance.
- Visitor centres (43 per cent), asking friends or family (39 per cent) or tourism websites (38 per cent) have been the most common sources of information for planning these trips.

Appeal and Intent to Travel

- Demand for self-drive tourism is high, with **82 per cent** of respondents likely to take an Australian road trip in the future; **46 per cent** of which indicated they are “extremely likely” to do so.
- Around 1 in 10 (11 per cent) are likely to consider travelling the Outback Way in the future. However, of those aware of the route, **61 per cent** indicated likelihood to consider a trip.
 - These figures suggest low awareness as a barrier for travel intentions, with effective marketing communications key to driving visitation and appeal in the future.
- Overall, around one in two (**63 per cent**) feel the Outback Way would be an appealing road trip to take in the future.
- Lowest appeal was among those aged 70+, with particular hesitation due to perceptions of safety, lack of access to services or not having adequate vehicles/equipment for the drive.
- Appeal was highest among those aged 40-49 years and those with young families.
 - These figures suggest future infrastructure investment should prioritise provision of necessary services, and cater to a diverse visitor population
- After Alice Springs (74 per cent), Kalgoorlie (**56 per cent**) and Lake Ballard (**55 per cent**) would be the most appealing destinations to visit for those considering travelling the Outback Way in the future, highlighting potential marketing opportunities.
 - **Kalgoorlie** was most appealing for those aged over 40, those with mature families/empty nesters, or those with moderate-high household income
 - **Lake Ballard** was considerably more appealing for females, those aged under 50, and those with young families.
 - Respondents from all states indicated the same top destinations of appeal.
- Those who have previously travelled the Outback Way are more likely to travel it again, with **41 per cent** of past travellers likely to do so in the next 12 months.

Key Findings (*continued*)

Impact of Sealing the Outback Way

- **86 per cent** of respondents consider the sealing of the Outback Way a positive change. 13 per cent indicated a negative reaction, largely due to concerns that the “outback feel” would be impacted by the project.
- Appeal of traveling the Outback Way increased from 63 per cent to **74 per cent** once sealed; **48 per cent** of which indicated the route would be an “extremely appealing” road trip once fully sealed.
- For those unlikely to travel the Outback Way, deterrents primarily include vehicles not being suitable or not having a 4WD - concerns that will largely be overcome as a result of the sealing of the route.
- Appeal of the Outback Way will increase for all demographic segments, with young families and those with moderate household incomes most likely to find the Outback Way appealing once sealed.
- While those aged 70+ remained the least likely to find the Outback Way appealing, the sealing of the route increased appeal within this age group from 51 per cent to **69 per cent** (an increase of +18 per cent)
- Around 3 in 4 (**76 per cent**) indicated likeliness to travel some part of the Outback Way once it is sealed, with WA and NSW residents most likely to do so.
 - Travelling only the WA portion was the most preferred option, with over 1 in 2 (**53 per cent**) indicating likeliness to travel this route.
- 1 in 2 (**50 per cent**) highlighted their likeliness to travel was motivated specifically due to feeling more comfortable driving on a sealed road, with **61 per cent** of those aged 50+ sharing this sentiment.

Intent to Travel (Once Sealed)

- Those most likely to travel are motivated by seeing natural wildlife and a sense of adventure
- **5 per cent** indicated they would be *less likely* to travel the Outback Way if it was sealed, with those aged 18-29 most likely to hold this sentiment.
- Sealing the route will expand its overall appeal and open up potential new markets, as almost 3 in 4 (**71 per cent**) indicated they would be *more likely* to travel the Outback Way once sealed.
- **80 per cent** of regional QLD residents (and 73 per cent of QLD metro) indicated sealing the road will increase likelihood to travel.
- Respondents indicated safety (**27 per cent**) and not needing a 4WD (**25 per cent**) as the top reasons for increased intent to travel the sealed road.
- Future trips closely resemble current trends, with couples (**45 per cent**) or families (**28 per cent**) most likely to travel the Outback Way in the future. However, on average, people are more likely to take longer trips once the road is sealed.
- Travellers will be most likely plan and book their trip using information from the Outback Way website (**72 per cent**), tourism websites (**59 per cent**) or visitor centres (**49 per cent**), highlighting the need to ensure consistent and accurate information and booking facilities across these channels.
- Future travellers would be most interested in finding out the location of fuel stops, accommodation options and the best time of year to travel before undertaking their trip.

Prioritisation of Services

- Respondents indicated their top priorities for services, facilities and attractions for undertaking a trip along the Outback Way, including the following:
 - **Fuel stops/road houses with basic facilities**
 - **Fuel stops/road houses with higher quality/upgraded facilities**
 - **Access to medical services**
 - **Access to vehicle breakdown/mechanic services**
 - **Reliable phone connection/service**
 - **Low-cost, basic accommodation**
- These responses highlight the **availability of services** and quality of facilities as key priorities for undertaking trips along the Outback Way in the future.
- **Safety** is a core aspect of consumer expectations, and providing reassurance of this will help to drive appeal for future travellers.
- These priorities were consistent across respondents from differing states, in metro/regional areas, between those who have/have not travelled before, and by age group.
 - This suggests the Outback Way has the ability to appeal to a broad audience, and service/facility provision should reflect an equivalent audience base.

Opportunities

- Although service provision was the highest priority for future travellers, respondents also indicated an interest in **Aboriginal tours/experiences**, or unique hospitality offerings including Indigenous foods for future trips along the Outback Way.
- Additional experiences or activities with appeal for potential travellers include walking/hiking/biking trails, lookouts, unique accommodation (glamping), local community events, stargazing tours or Aboriginal art museums; highlighting opportunity for further experience development of a diverse range of tourism activities along the Outback Way.

Insights

Insight 1: *Taking an iconic road trip is appealing to a broad range of people*

- Over 80% are likely to take an Australian road trip some time in the future, demonstrating significant growth potential for the sector.
- Road trip intentions are lowest among the 70+ age group, which may challenge assumptions that the 'grey nomads' group make up the greatest proportion of road trip travellers. Future marketing communications should consider audiences of all ages.

Insight 4: *Increased safety and accessibility are key reasons for higher appeal*

- The lack of need for 4WD vehicles or specialised off-road equipment improves consumer perceptions of accessibility and safety of travelling the Outback Way once it is sealed.
- Those *less likely* to travel the sealed road fear the route could lose its authenticity or sense of outback adventure*

*A small portion (5 per cent) of respondents indicated the sealing would deter them from travelling the route in the future.

Insight 2: *Current awareness and usage of the Outback Way is relatively low*

- After prompting, only around 1 in 3 have heard of the Outback Way.
- Awareness is highest in QLD and among those with highest household incomes, but lowest among those under 30 years.
- Less than 1 in 10 have travelled the route before.
- Over **60 per cent** of those aware of the Outback Way would consider a trip in the future.

Insight 5: *To encourage future travel on the Outback Way, people want services that will help them feel safe*

- Access to regular fuel stops/road houses, medical services, mechanic services, emergency services and phone connection are most important to those considering a trip – with these priorities consistent across different demographic subgroups.
- Increased appeal for the route among young families highlights the increasing need for safety provision, and the ability for travellers to work remotely heightens the desire for reliable internet connection.

Insight 3: *Likelihood to travel will increase once the route is sealed*

- Over 7 in 10 are **more likely** to take a trip along the Outback Way once it is sealed
- Those most likely to travel the sealed road include young families, those aged under 70 and WA/NSW residents.
- Appeal to travel for those aged 70+ increases from almost 5 in 10 to **7 in 10** once sealed.
- Alice Springs, Kalgoorlie and Lake Ballard are the most appealing destinations associated with the Outback Way.

Insight 6: *Provision of unique cultural tourism offerings will help to enhance the visitor experience*

- Low-cost, basic accommodation and food/beverage options were preferred over upscale alternatives, suggesting travellers are seeking an authentic outback experience.
- There is also appetite for local Aboriginal tours, art museums and experiences or unique hospitality experiences including Indigenous foods.