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ABSTRACT

The study was undertaken to investigate the consideration and choice of Australian holiday destinations from a brand salience perspective. The primary objective was to describe a product category structure for Australian holiday destinations. A qualitative research methodology was adopted in which a total of 20 semi-structured face-to-face interviews were conducted with residents of Sydney and Melbourne. The results of the research provide examples of domestic holiday travel within a framework based on benefits sought, relevant experiences, travel context, destination attributes and destination set. The findings are reviewed in the context of the tourism literature relating to destination choice and the marketing literature relating to brand salience and marketing communications. On the basis of the research findings a goal derived category structure for Australian domestic travel is proposed consisting of nine partitions labelled as: ‘active adventure’, ‘beach resort’, ‘city break’, ‘drive touring’, ‘family and friends’, ‘iconic nature’, ‘wellness retreat’, ‘wilderness escape’ and ‘wine region’. The research provides insights into the way in which destinations function as competing choice objects or brands.

Acknowledgements

The Sustainable Tourism Cooperative Research Centre, an Australian Government initiative, funded this research. Many thanks to the South Australian Tourism Commission for their invaluable input. We would also like to thank the interview respondents, who were recruited at random from the general population by the Ehrenberg Bass Institute for Marketing Science at the University of South Australia.
SUMMARY

Objectives of Study
The study was undertaken to investigate from a qualitative perspective the process by which consumers think about holiday travel in Australia and the process by which destination sets are formed and evaluated. An important objective was to investigate the extent to which destinations function as competing choice objects or travel brands.

Methodology
To meet the research objectives a total of 20 semi-structured face-to-face interviews were conducted with domestic travel consumers resident in Sydney and Melbourne. Respondents were selected at random from specified postcode areas by trained and accredited market research interviewers from the Ehrenberg Bass Institute for Marketing Science at the University of South Australia. Quotas were imposed on the basis of age, sex and travel behaviour.

The interview was based on a checklist questionnaire that incorporated a number of open ended questions and a picture sort task using a set of 19 images of experiences and activities. The top four images identified by respondents from the picture sort were recorded and used as prompts to further probe the respondents travel preferences and behaviours. The interviews were audio-taped and transcripts prepared from the tapes. The data was analysed through mapping of responses into themes and categories with reference to the research objectives and the theoretical basis of the research.

Key Findings
The key findings of the research relate to the specification of a goal derived market partition structure for Australian holiday travel. The proposed structure is summarised below. The choice alternatives were those provided by the research participants and it not proposed that the set of choice alternatives specified for each category is necessarily comprehensive.

<table>
<thead>
<tr>
<th>Category</th>
<th>Benefits sought</th>
<th>Context/ Profile</th>
<th>Attributes</th>
<th>Choice alternatives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active adventure</strong></td>
<td>Adventure/activity focus Social / relatedness. May be competitive ‘Trophy’ experiences</td>
<td>Couples friends Males may travel with group of male friends The activity/experience will evoke the destination Travel may be an outcome of broader recreational interests/behaviour</td>
<td>Walking Cycling 4WD Hunting Sport fishing Sailing Golf Events</td>
<td>Outback/4WD trails Walking trails e.g. Overland Track Sailing: Whitsundays Mass participation cycling event e.g. Great Ocean Road Range of destinations linked to the activity</td>
</tr>
<tr>
<td><strong>Beach resort</strong></td>
<td>Relaxation Sensory gratification Lifestyle/good living Relatedness</td>
<td>Short break for couple/friends/families Will access interstate markets through direct flight access Resort (or resort package) may be choice object</td>
<td>Sun and sand Water based activities. Restaurants and cafes Activities for children</td>
<td>Pt Douglas, Noosa, Broome, Coolum, Hamilton Island, Gold Coast, Byron Bay Incl. overseas: Bali, Fiji</td>
</tr>
<tr>
<td><strong>City break</strong></td>
<td>Sensory gratification Excitement Relatedness</td>
<td>Short break May involve catching up with family/friends Travel as couple or group of friends</td>
<td>Nightlife/entertainment Restaurants/Museums/galleries Festivals and events Shopping, Interesting attractions within day trip</td>
<td>Melbourne, Sydney, Brisbane, Adelaide, Perth, Canberra, Hobart</td>
</tr>
<tr>
<td>Category</td>
<td>Benefits sought</td>
<td>Context/ Profile</td>
<td>Attributes</td>
<td>Choice alternatives</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Drive touring</td>
<td>Discovery/Sensory gratification/Sightseeing</td>
<td>Travel with partner or friend's trip will be 1 week to 4 weeks. May incorporate another goal or holiday type e.g. an event, wine region, wilderness escape. Focus is on touring routes and regions rather than specific destinations.</td>
<td>Plenty to see and do. No long boring stretches. Nature/food and wine. Interesting towns.</td>
<td>Great Ocean Road, Tasmania, New Zealand, South Western Australia, Robe/Barossa/Clare Valley (itinerary built on food and wine associations).</td>
</tr>
<tr>
<td>Family and friends</td>
<td>Relatedness/Relaxation</td>
<td>Family or extended family—often annual—1 week to 2 weeks. Less discretionary. Will return to same place year on year.</td>
<td>Range of activities. Will please all members of the family. Not too far to drive. If interstate direct flight access.</td>
<td>Beach locations—rented house/unit. Resort—with child care facilities—secure. Theme parks e.g. Gold Coast.</td>
</tr>
<tr>
<td>Iconic nature</td>
<td>Discovery. May have educative component—parents showing the country to their children</td>
<td>Longer duration. May be alternative to overseas trip. Couples, younger friendship groups, families. May form basis of round Australia trip. May also fly direct and stay and/or take a tour.</td>
<td>Well known—unique scenic attractions. World heritage.</td>
<td>Uluru, Kakadu, Bungle Bungles/ Kimberly, Ningaloo Reef, Daintree, Whitsundays, Port Douglas (Great Barrier Reef)</td>
</tr>
<tr>
<td>Wellness retreat</td>
<td>Rejuvenation</td>
<td>Short break to detox and rejuvenate. Focus on self. Singles/couples One week or less. The retreat is the choice object.</td>
<td>Range of activities. Spas, massage, meditation, exercise.</td>
<td>Branded retreat e.g. Golden Door, Chiva Som (Thailand)</td>
</tr>
<tr>
<td>Wine region</td>
<td>Sensory gratification ‘Lifestyle / good living’—similar to beach resort in this respect</td>
<td>Short break for couple/friends—particularly in cooler weather. Hedonistic daytrips. Unless there is access to interstate flights may be primarily intrastate / day trip or component of a longer touring holiday.</td>
<td>Wine tasting. B&amp;B accommodation. Restaurants and cafes. Art galleries. Cycling / walking trails. Food and wine events.</td>
<td>Barossa, Clare Valley, McLaren Vale, Yarra Valley, Hunter Valley, Margaret River</td>
</tr>
</tbody>
</table>

The results of the research suggest that the consumer decision process will vary substantially on the basis of the type of holiday that is being considered. For certain types of travel the destination may be of lesser importance in the decision process when weighed against factors such as the activities offered, security, travel distance and access. Under these circumstances the consumer may choose from a set of resort packages or experientially focused tour offerings—the consideration set will not necessarily be constructed from destinations functioning as competing choice objects or brands. A travel brand might be a resort, for example Club Med where the destination is an attribute of the brand—such as Club Med Lindeman Island, Hyatt Regency Coolom. The travel brand may also be a wholesaler, for example Qantas Holidays, with the product offerings a series of packaged tours or deals in which the destination may again be one attribute along with price, accommodation and tours.

The type of travel in which the destinations appear to most closely function as brands was discovery orientated travel. This was also the type of travel in which the decision process appeared to approximate the process of choice described by Um and Crompton (1992) in which respondents had a set of places they wanted...
to visit with a prototypical or ‘dream’ destination at the top of the list and a ‘graded’ preference structure associated with the other destinations and the final choice of destination determined primarily by constraints.

Destinations associated with beaches, beautiful scenery and/or ‘good living’ may also be more likely to function as destination brands, for example, Noosa, Gold Coast, Barossa.

The research suggests that State Tourism Organisations (STOs) that are developing state/territory level destination brands for travel and tourism may be more effective if their strategy takes into account the category structure of domestic holiday travel and focuses on those places and/or experiences that are most likely to represent choice alternatives for the consumer. With the exception of Tasmania there was little evidence that Australians states and territories are evoked as competing choice objects.

Future Action

Further quantitative research will be undertaken by the author to validate the market structure proposed as an outcome of this study.
Chapter 1

INTRODUCTION

This report presents the results of a study that was undertaken as a component of a Masters by Research project through the University of South Australia examining issues relating to the consideration and choice of Australian holiday destinations. The qualitative component of the research which is the subject of this report was funded by The Sustainable Tourism Cooperative Research Centre, an Australian Government initiative.

Research Aims and Objectives

The aim of the research was to investigate from a qualitative perspective the process by which consumers think about holiday travel in Australia and the process by which destination sets are formed and evaluated. The specific objectives were to identify:

- the benefits sought by consumers from holiday travel in Australia
- the situational context in which holiday travel had occurred
- the destination attributes that would address the respondents travel needs
- sources of information and other factors that would potentially stimulate destination awareness
- the structure of goal derived consideration sets for Australian holiday travel.

The research was also undertaken to identify the process of destination choice for holiday travel within Australia and the extent to which destination choice is a rational process involving the evaluation of a discrete set of choice alternatives.
Chapter 2

BACKGROUND

Information Processing Models of Consumer Behaviour

The models of destination choice most commonly found in the tourism literature (Sirakaya & Woodside, 2004) have evolved from the so called ‘grand models’ of consumer behaviour (e.g. Howard & Sheth, 1969) in which choice is a rational considered process involving information search and cognitive evaluation of competing alternatives. These models are generally consistent with Fishbein and Azjen’s (1975) theory of reasoned action under which intention to act and subsequent behaviour is an outcome of attitude to the choice object.

The choice of a product or service will be made from a small number of choice alternatives known as the consideration set or evoked set. Within this tradition consideration sets are generally conceived as relatively static within individuals (Nedungadi 1990; Holden & Lutz 1992) and are most commonly defined taxonomically on the basis of the characteristics of the product offering, for example light versus full strength beer (Rosch & Lloyd 1978). Situational or contextual elements are likely to be regarded as influencing the relative importance of the object attributes in the decision rule rather than influencing the structure of the consideration set. The cognitive attitude based model of choice implies that the objective of communication is to:

• develop a brand positioning that is both appealing and unique
• develop advertising that persuasively communicates the brand positioning.

Due to the large number of potential travel destinations, tourism theorists (Woodside & Lysonski 1989; Crompton 1992; Um & Crompton 1992; Sirakaya & Woodside 2004) have generally approached destination choice as a phased filtering process. The reduction of destination options occurs over time and choice of destination generally precedes choice for other components of the travel experience (e.g. accommodation, transport and tours).

One of the first comprehensive models of destination choice was described and tested by Woodside and Lysonski (1989). A number of choice sets were proposed by the authors including the awareness set, consideration set, unavailable aware set, inert set and inept set. Under this model consideration is contingent on consumer characteristics (previous destination experience, lifecycle, income, age, lifestyles and values) and marketing variables (product, pricing, promotion and distribution). Preference and intention are determined by affective associations and situational variables mediate the link between intention and behaviour.

Um and Crompton (1992) replaced the awareness set with the ‘initial consideration set’ which consists of the destinations the consumer is considering as possible vacation destinations within some period eg a year. Destinations are evoked to a late consideration set on the basis of affective attributes that address the consumer’s motivational profile—the image factors that attract the visitor. Final selection from the late consideration set is primarily a process of elimination based on constraints. Constraints are defined as destination attributes that represent barriers to choice (e.g. distance, travel time, security, health, seasonality, overcrowding). The authors also found support for the proposition that the travel decision is a satisfying behaviour (Simon 1956) that is constraint driven rather than an optimisation of travel benefits as would be implied by a multi-attribute compensatory decision rule.

While the ‘grand models’ of consumer behaviour may also incorporate low involvement or routine purchase models of choice where consideration of alternatives and information search are limited, tourism and travel has generally been regarded as a high involvement product category (Sirakaya & Woodside 2004; Rossiter & Percy 1987).

Destination branding strategies (Morgan, Pritchard & Pride 2004) generally reflect the information processing models of consumer behaviour under which brand strategy involves the establishment of a strong, positive and differentiated destination image.

1 Under the Fishbein model choice may be estimated on the basis of a compensatory decision rule the simplest form of which is the multi-attribute attitude model (Schiffman et. al., 1997).
2 For discussion of low involvement models of tourism and travel see McWilliams and Crompton, 1997; Prentice, 2000; Sirakaya and Woodside, 2005.
The Brand Salience Model of Consumer Behaviour

In recent years it has been argued on the basis of advances in neuroscience (Heath, 2000) that consumer decisions are most commonly made intuitively rather than rationally and most advertising is processed at low levels of attention. In keeping with these findings brand salience has been increasingly discussed in the marketing literature (Ehrenberg, Barnard & Scriven 1997; Miller & Berry 1998; Romaniuk & Sharp 2004) as a determinant of consumer behaviour. Brand salience is defined as ‘the propensity of the brand to be noticed or come to mind in buying situations’ (Romaniuk & Sharp 2004).

The brand salience model posits that marketing communication works by increasing a brand’s ‘share of mind’ rather than by changing brand attitude. Increasing the likelihood of consideration will change brand beliefs as an artefact of consideration and usage (Ehrenberg 1997).

The salience model also differs from the cognitive models in that choice alternatives are elicited in response to consumer goals, and goal structure within individuals is fluid and context dependent rather than static across purchase and consumption environments (Nedungadi, 1990; Ratneswar & Shocker 1991; Holden & Lutz 1992). Under this approach object retrieval will vary across situations in response to variation in goal structure. For example, goal derived categories for travel might be ‘a resort for a relaxing short break’, ‘an iconic natural destination for a discovery orientated touring holiday’. The communication strategy implied by the salience model rests on increasing the likelihood of consideration and involves:

- developing advertising that will be noticed
- developing advertising that is entertaining/likeable
- developing advertising that is well branded
- developing advertising that is distinctive—not differentiated.

Other marketing activities such as sponsorships, promotions and public relations can also effectively build brand salience. (Miller & Berry 1998; Ehrenberg, Barnard, Kennedy & Bloom 2002). The salience model represents the ‘weak’ theory of advertising effects when compared to the persuasive or ‘strong’ theory of effects. For Romaniuk and Sharp (2004) a measure of brand salience will involve the following components:

- a representative range of brand attributes across purchase situations, benefits and functional qualities;
- measurement of associations including the complete brand set rather than focusing on attribute brand associations in isolation
- focus on retrieval rather than evaluation.

Holden and Lutz (1992) argue that brand cues may derive from the product category; choice situation; brand attributes; brand benefits; and brand attitudes. Desai and Hoyer (2000) identify six situational elements that may influence brand evocation: activity (e.g. shopping); temporal (e.g. time of day); antecedent state (e.g. mood/tired); location (e.g. home/work); other people (e.g. friends); and objects which are distinct items present in a situation. The dominant elements influencing retrieval in response to situational context are said by Desai and Hoyer to be usage occasion3 and location. For Lutz (1980) situational context may relate to purchase; consumption and communication environments. Belk (1975) defines situational factors as particular to a time and place and independent of consumer and product characteristics.

Travel Motivation

The salience model rests on the likelihood that a choice alternative will come to mind in a purchase situation and model specification requires therefore an understanding of the structure of consideration sets and the cues that will evoke a choice alternative to working memory.

If it is hypothesised that consideration sets are goal derived, a model of travel motivation is required as a framework for describing the structure of the consideration process. Beard and Ragheb (1983) have conducted an extensive analysis of benefit structure for travel and tourism and identified the following factors.

---

3 Usage occasions are conceptualised by Desai and Hoyer on the basis of activity, antecedent state and temporal factors.
Table 2: A four factor model of travel motivation

<table>
<thead>
<tr>
<th>Factor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intellectual</td>
<td>This factor is related to mental activities such as learning, exploring, discovering, creating or imagining.</td>
</tr>
<tr>
<td>Social</td>
<td>This factor relates to interpersonal relationships and the need for the esteem of others.</td>
</tr>
<tr>
<td>Competence/Mastery</td>
<td>Need to achieve, master, challenge and compete. Usually involves physical activities.</td>
</tr>
<tr>
<td>Stimulus/Avoidance</td>
<td>To escape the stress of everyday life. To rest and relax.</td>
</tr>
</tbody>
</table>

The factor structure also has some elements in common with Dann’s (1977) theory of travel motivation with Stimulus/Avoidance reflecting the anomie (push) dimension and the other dimensions reflecting ego enhancement (pull) dimensions. The model also has similarities to the broader theory of consumer motivation described by Rossiter and Percy (1987) who also identify sensory gratification as a factor.

Tourism Market Partitions

Destination marketing organisations have traditionally defined market structure taxonomically on the basis of the characteristics of supply or other descriptive characteristics of trip behaviour. For example wine tourism may be defined as visitors to winery cellar doors; cultural tourism may be visitors to museums and cultural attractions; backpackers may be travelers staying in hostel accommodation.

While these approaches are directly relevant to the wineries, cultural attractions and other businesses that service these tourists, further research is typically required to determine the motivations of the visitors to these attractions. It is also the case that the categories overlap to a considerable degree.

A category structure that is based on travel needs—and the benefits sought in response to those needs—provides a mechanism for specifying market partitions that provide a foundation for the specification of a salience model of destination choice and a direct link to product development and communication objectives. The competitive environment can be more clearly understood through linkage to consumer goal structure when compared to a market structure based on the characteristics of supply.
Chapter 3

METHODOLOGY

To meet the research objectives, a total of 20 in-depth interviews were conducted with domestic travel consumers in Sydney and Melbourne in April 2006. To recruit the research respondents, households within selected postcode areas were contacted by telephone at random by trained and accredited market research interviewers from the Ehrenberg Bass Institute for Marketing Science at the University of South Australia.

The purpose of the study was explained to the respondent and they were asked whether they would be interested in participating in a face-to-face interview lasting around 45 minutes. If yes, they were asked a number of questions relating to their age, sex and travel behaviour and quotas were applied on the basis of these criteria. The respondents must have taken an interstate holiday in the past six months or be planning to take an interstate holiday within the next six months.

Where agreeable, a letter was sent to the respondent prior to the interview outlining the project and confirming the details of the appointment. The respondents received a cash incentive of S50 as a consideration for their involvement. The characteristics of the respondents are summarised below.

Table 3: Demographic characteristics of the research participants

<table>
<thead>
<tr>
<th>Age/Sex</th>
<th>Melbourne Malvern, Glen Iris, Brighton</th>
<th>Melbourne Camberwell, Balwyn, Surrey Hills</th>
<th>Sydney Newtown, Enmore, Camperdown</th>
<th>Sydney Lane Cove, Naremburn, Woolstonecraft</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>F 20–34</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>M 20–4</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>F 35–54</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>M 35–54</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>F 55+</td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>M 55+</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>20</td>
</tr>
</tbody>
</table>

The interviews were conducted on the basis of a checklist of issues however where possible, Cognitive Interviewing procedures (Geiselman & Fisher 1992) were adopted to encourage information flow by the respondent.

Toward the end of the interview a picture sort was introduced by the researcher. The respondents were asked to select four pictures from a set of 19 and to describe why they had picked each one. They were then asked whether there were any common themes or experiences that linked the images and also whether they would associate the images with any parts of Australia. The picture sort was used as a projective technique to evoke further thoughts about travel places and experiences in Australia.

Specific questions were also included in regard to South Australia. These questions were introduced at the end of the interview and had no bearing on the specification of destinations that form the basis of the consideration sets. The interviews were audio-taped and transcripts prepared. The interview transcripts formed the basis for the analysis presented in this report.

The analysis of the text was undertaken through mapping of the responses into themes and categories (Jones 1985) with reference to the theoretical basis of the research—that is, the search for goal derived category structure. The recruitment questionnaire and interview schedule are included at Appendix A.
Chapter 4

GOAL DERIVED CONSIDERATION SETS

Introduction

The primary objective of the research was to provide a foundation for the specification of a brand salience measurement model, the validity of which is to be tested quantitatively as a second stage of the HDR project. The specification of a salience measurement model rests on an understanding of the benefits sought by consumers, the consumption and purchase environments, brand attributes and attitudes that will potentially cue a choice alternative for consideration in a purchase environment.

The results of the qualitative interviews presented in this section provide a summary of the places evoked by the interview respondents when asked to think about their recent domestic travel experiences or a travel experience they were planning in Australia within the next six months.

The responses have been classified on the basis of their apparent trip motivation providing therefore a classification of trip characteristics and context which is goal derived.

Holiday Travel Motivated by Discovery/Exploration

An important goal for many travelers is the desire to explore or discover their own country and more broadly the world. While constraints such as available time, finances and interests of family and friends may inhibit this desire, it was a component of travel motivation for most of the respondents.

For many individuals the discovery destination set may include overseas countries, particularly younger individuals, many of whom are exclusively focused on overseas travel.

While families are generally constrained by the needs of their children and were in most cases not interested in travelling long distances or touring by car, there was a component of this market that was interested in a substantial travel experience in Australia with their children that would be remembered as a significant family experience. Parents are interested in showing the country to their children. Again this may be a substitute for an overseas travel experience.

The respondents interested in a discovery orientated trip in Australia were more likely to be in the empty nest life stage. Some examples of the places evoked for this type of holiday are summarised on the following pages.

<table>
<thead>
<tr>
<th>Activities/ experiences</th>
<th>Context/Profile</th>
<th>Destination attributes</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>Retired couple</td>
<td>Iconic nature, Isolation</td>
<td>Bungle Bungles, The Ghan to Darwin</td>
</tr>
<tr>
<td>Touring by car Sightseeing</td>
<td>Retired couple.</td>
<td>Scenery—variety of things to see without driving long distances</td>
<td>Tasmania, New Zealand</td>
</tr>
<tr>
<td>Travelling around Australia</td>
<td>Young family—trip of a lifetime. One child, 8 years. Husband had resigned from job to travel. Thought about overseas but too expensive.</td>
<td>Natural/undeveloped Known for good food and wine Crayfish—Robe Oysters—Coffin Bay Wine—Barossa/Robe/ Margaret River</td>
<td>Robe, Barossa Valley, Coffin Bay, Perth, Margaret River, Kimberly, East coast</td>
</tr>
<tr>
<td>Camping</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enjoying food and wine in a natural environment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### DESTINATION SALIENCE

<table>
<thead>
<tr>
<th>Activities/experiences</th>
<th>Context/profile</th>
<th>Destination attributes</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spiritual experience</td>
<td>Retired male. Enjoyed separation from every day life.</td>
<td>Iconic nature</td>
<td>Bungle Bungles, Kakadu</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sightseeing</td>
<td>Young family Husband is self-employed and finds it difficult to get away—trip was 5 days only. Flew to Uluru</td>
<td>Iconic nature</td>
<td>Ayers Rock, Kings Canyon</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education for children</td>
<td></td>
<td>Natural beauty Things to see without travelling long distances. Recommended in Lonely Planet cycling guide to Australia</td>
<td>Tasmanian, South Island NZ</td>
</tr>
<tr>
<td>Meeting people</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Touring by car.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sightseeing Cycling</td>
<td>Young female student—travelling with boyfriend—constrained by money so travelling in Aus rather than overseas. Travelling for around 4 weeks. Cycling/walking for day trips</td>
<td>Cultural difference Spirituality</td>
<td>Tibet/India, Arnhem Land</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing a different culture/Aboriginal culture</td>
<td>As above May feel unsure about accessing Aboriginal culture in an appropriate manner Would do this as a volunteer or attending an event such as the Garma festival</td>
<td>Cultural difference Spirituality</td>
<td>Darwin, Kakadu, Arnhem Land</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aboriginal culture</td>
<td>Retired couple—Sydney Had frequent flyer points so flew to Darwin and booked with a tour operator from Darwin, 1 to 2 weeks</td>
<td>Iconic nature</td>
<td>Darwin, Kakadu, Arnhem Land</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring by car</td>
<td></td>
<td>New—haven’t been before</td>
<td>Tasmanian, Northern Qld—Cape York</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring by car</td>
<td></td>
<td>Iconic natural attractions. Indigenous culture. Also freedom/release/slower pace of life in the outback.</td>
<td>Uluru, Kakadu, Whitsundays, Daintree, Tasmania</td>
</tr>
<tr>
<td>, Sightseeing.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring by car</td>
<td></td>
<td>Scenery Wildflowers</td>
<td>Perth/Fremantle/ Margaret River, Tasman /St Helens, Great Ocean Road, Grampians, Robe, Adelaide</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>Retired couple—Have business interests in Adelaide and enjoy driving to SA Friends tend to talk about WA</td>
<td>Iconic culture.</td>
<td>New Zealand, Tasmania, Kimberley, India, China</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring by car</td>
<td></td>
<td>Different geographically, and /or culturally</td>
<td>Kimberly, Kakadu</td>
</tr>
<tr>
<td>Learning about new</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>places/cultures</td>
<td>Mid life stage family—Sydney North Shore—appear to allocate significant resources to travel</td>
<td>Iconic nature</td>
<td>Kimberly, Kakadu</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring by car</td>
<td></td>
<td>Lots to see Not to dispersed</td>
<td>Tasmania—car touring</td>
</tr>
<tr>
<td></td>
<td>As above</td>
<td></td>
<td>Perth and car touring from Perth—Albany</td>
</tr>
<tr>
<td>Iconic rail journeys</td>
<td></td>
<td></td>
<td>Ghan to Darwin, Indian Pacific to Perth</td>
</tr>
</tbody>
</table>

This group can be summarised into two broad experience categories consisting of:

- travelers with an interest in experiencing the ‘iconic’ natural features of the country including Uluru and the Red Centre, Kakadu, Broome, the Kimberley, the Great Barrier Reef, the Daintree
• a second group whose members can be regarded more broadly as sightseers or tourers. These individuals are interested in seeing new parts of the country but from a broader less focused perspective. Destinations in this context were Tasmania, the Great Ocean Road, South Western Australia, and also the great rail journeys—the Ghan and the Indian Pacific.

There was some interest in accessing and learning more about Aboriginal culture, provided they were able to do this in an authentic and meaningful way. Respondents were unsure however in some instances about how they would achieve this.

There was an element of spreading geographic interest with travelers motivated to look around the next corner once they had become familiar with a place. A couple from Sydney for example, with an interest in camping in natural areas, had become aware of the Grampians after attending a music festival in Ararat and planned to visit in the future in conjunction with a trip on the Great Ocean Road. Another individual had formed a desire to visit a place in Tasmania because he used to sail past it during the Sydney to Hobart yacht race.

This category of travel will also include festivals and events at which there is an opportunity to experience or learn about new things such as arts festivals and writers festivals.

**Holiday Travel Motivated by Socialisation/Relatedness**

The research provided examples of holiday behaviour that was motivated primarily by social and relatedness needs. For young people, domestic holiday activity was undertaken with groups of friends to socialise and have fun.

For families the annual beach holiday represents a chance to reconnect with immediate and extended family and friends in a relaxed, comfortable environment. The annual family holiday was often undertaken at a familiar location that was not too distant from the respondent’s usual place of residence. Respondents would return to the same place year on year as they needed to satisfy the needs of a range of family members and did not want to take risks with this experience. If they find a place that all the members of the family enjoy they will return to it.

A number of female respondents stated that they liked meeting people while on holidays and they tended to be more outgoing and sociable in these circumstances. There is the sense that people can perhaps ‘let their hair down’ while on holidays without the consequences they might be subject to at home.

A further element of relatedness needs is social approval and places that are discussed and have aspirational appeal amongst the traveler’s social network or reference group will also be more likely to be considered. Examples of holidays undertaken primarily for relatedness or social needs are summarised in Table 5.
Table 5: Examples of domestic travel undertaken for socialisation and relatedness

<table>
<thead>
<tr>
<th>Activities/experiences</th>
<th>Context/profile</th>
<th>Destination attributes</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconnecting with family and friends.</td>
<td>Mature family—Melbourne Summer family holidays</td>
<td>Activities for everyone, familiar, no surprises, not too far away</td>
<td>Mt Martha</td>
</tr>
<tr>
<td>City break with friends</td>
<td>Young male and friends—Melbourne Short duration Spur of the moment trip Jump in the car and go, long weekend</td>
<td>Things to do at the destination</td>
<td>Major cities—Sydney, Brisbane, Adelaide</td>
</tr>
<tr>
<td>Attending music festival</td>
<td>Young female—Melbourne Large group of friends—early 20s—Short break &lt; one week</td>
<td>Music, pubs, warm weather</td>
<td>Byron Bay Blues and Roots Festival</td>
</tr>
<tr>
<td>Houseboating</td>
<td>As above—could be an alternative to a festival trip.</td>
<td>Food and wine/party</td>
<td>Murray River</td>
</tr>
<tr>
<td>Family holiday</td>
<td>Young family—Melbourne</td>
<td>Activities for the children</td>
<td>Gold Coast</td>
</tr>
<tr>
<td>City break to visit friends</td>
<td>Retired couple—drove to Melbourne —5 days Took day trips with friends from Melbourne—Yarra valley</td>
<td>Friends/new experiences</td>
<td>Melbourne, Yarra Valley</td>
</tr>
<tr>
<td>Family holiday</td>
<td>Mid life stage mother—North Shore Sydney—may holiday with extended family One week</td>
<td>Beach—but not too rough. Theme parks Kids club Private houses available for rent (at beach). Activities for children Sports for adults—golf, tennis, windsurfing OK to take dogs</td>
<td>Byron Bay, Gold Coast, Club Med, Lindeman Island, Kulburra</td>
</tr>
<tr>
<td>Socialising</td>
<td>Young female Sydney—travelled with group of friends.</td>
<td>Wineries</td>
<td>Hunter Valley, Canberra</td>
</tr>
<tr>
<td>Eating/drinking.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For these families there were two main categories of destination:

- beaches and other places within a day trip, by road, from their usual place of residence, where they would make their own arrangements by renting a holiday house or taking a caravan
- commercial resorts, often reached by air, which offered a range of activities and support for both adults and children. For these experiences the actual destination location may be less important than the resort i.e. the consideration set is the resort rather than the place—although the Gold Coast is likely to be considered here.

The family traveler was the most constrained of all respondents. In particular, they are not interested in travelling long distances with children and tend to have limited time and potentially financial resources. The needs of their children will influence destination choice and they need to be confident that the whole family will enjoy the experience.

Younger people in some instances enjoyed road trips with friends but were more likely to enjoy activities such as city breaks, music festivals, wine regions and houseboating.
Holiday Travel Motivated by Relaxation/Indulgence

Stimulus avoidance or the need to relax is a negative or push motivation, as opposed to a pull or ego-enhancing motivational factor. While the need to relax and escape the everyday routine will influence travel across a range of holiday circumstances, it will be the major factor for some holiday experiences and in these circumstances, may be accompanied by sensory gratification, for example sunbaking, swimming, enjoying food and wine, spas/health treatments, romance and leisure shopping. The destinations evoked by respondents for this type of experience were as follows:

<table>
<thead>
<tr>
<th>Activities/experiences</th>
<th>Context/profile</th>
<th>Destination attributes</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Painting, Photography Fishing</td>
<td>Male—50s—Melbourne</td>
<td>Seaside. Not too far away/daytrip.</td>
<td>Port Philip Bay, Dandenongs</td>
</tr>
<tr>
<td>Enjoying food and wine</td>
<td>As above—has lived in SA</td>
<td>Cellar doors Cafes B&amp;B accommodation</td>
<td>Clare Valley, McLaren Vale, Barossa, Yarra Valley</td>
</tr>
<tr>
<td>Enjoying food and wine Sightseeing</td>
<td>Young female—Melbourne—travelling with one or two friends for short break Liked the beauty of wine regions rather than tasting wine</td>
<td>Supporting infrastructure Cafes, restaurants, attractions Markets</td>
<td>Perth/Margaret River, Broome, Hobart, Adelaide</td>
</tr>
<tr>
<td>Relaxation</td>
<td>Mature couple—Sydney</td>
<td>Warm weather Beach Island</td>
<td>Whitsundays, Port Douglas</td>
</tr>
<tr>
<td>Relaxation Sightseeing Recreational shopping</td>
<td>Mature couple—Sydney Had business interests in SA and knew Adelaide well</td>
<td>Relaxed/charming city</td>
<td>Adelaide/Glenelg</td>
</tr>
<tr>
<td>Relaxation/rejuvenation</td>
<td>Mid life stage mother—late 30s to 40s—North shore, Sydney Stress break for self—5 days</td>
<td>Health retreat Exercise, spa, diet, meditation</td>
<td>Glengana, Golden Door</td>
</tr>
<tr>
<td>Relaxation/Romance</td>
<td>Short break with partner Natural beauty Relaxing, intimate</td>
<td></td>
<td>Lord Howe Island</td>
</tr>
<tr>
<td>Spirituality</td>
<td>Female—Sydney—Yoga teacher Meeting spiritual leaders Initiation</td>
<td></td>
<td>India Northern Rivers area—NSW</td>
</tr>
</tbody>
</table>

Destination choice that is stimulated primarily by relaxation and sensory gratification will be most commonly focused on a particular destination and may also include beach resorts, city breaks and wine regions. This category also includes special events such as food and wine, music or arts festivals at which the stimulation of the senses is an important motivational factor. This type of travel may include aspirational product—luxury travel magazines were a source of ideas for one respondent in this regard.

When I come across things like Gourmet Traveller or something like that I love looking at those sorts of magazines, and having a bit nosey about how much money is being able to go those beautiful destinations and food places that they have in there. Female, 18–35 years, Melbourne

Holiday Travel Motivated by Adventure/Physical Activity

While physical activities will represent a component of most holiday experiences, for some individuals the activity represents the main focus for the trip. For example, a holiday maker may spend some time fishing while on their family beach holiday and in another instance they may travel with a tour operator to a specific place for a sport fishing experience.
While social factors are also important for this type of holiday the primary consideration is that the physical activity provides the basis for destination choice. There may also be a competitive element and an interest in the achievement of ‘trophy’ experiences for example walking a famous trail such as the Overland Track or four-wheel driving on an outback trail such as the Oodnadatta Track.

This category of travel will also include special events in which there is an element of participation such as the Great Ocean and Otway Ride in Victoria, Masters Games, World Police and Fire Games. The examples of this type of travel experience described by the respondents were as follows.

**Table 7: Examples of domestic travel undertaken for adventure and physical activity**

<table>
<thead>
<tr>
<th>Activities/experiences</th>
<th>Context/profile</th>
<th>Destination attributes</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiking/camping</td>
<td>Young male and friends&lt;br&gt;Had been involved in Scouts at a senior level</td>
<td>Challenging/more remote</td>
<td>Victorian alps, South West Victoria, Snowy Mountains, Tasmania – Overland Track, New Zealand</td>
</tr>
<tr>
<td>Sailing</td>
<td>Male (late 40s to 50s)—Melbourne&lt;br&gt;Has competed in Hamilton Island event annually over recent years&lt;br&gt;Enjoys male comradeship, competition&lt;br&gt;Member of yacht squadron</td>
<td>Natural beauty—opportunity to compete, other yachts</td>
<td>Hamilton Island Race Week— with male friends May visit Freycinet Peninsula/Hawkesbury River with family/friends for recreational sailing</td>
</tr>
<tr>
<td>Golf</td>
<td>Group of male friends—do same trip each year</td>
<td>Good quality regional golf courses&lt;br&gt;Not too far to travel between courses</td>
<td>Horsham, Dunkeld, Swan Hill</td>
</tr>
<tr>
<td>Fishing</td>
<td>Travel with group of male friends</td>
<td>Whiting</td>
<td>South Australia but not specific</td>
</tr>
<tr>
<td>Bushwalking</td>
<td>Single male 50s—Melbourne Holidays alone or with friends</td>
<td>Wilderness&lt;br&gt;Natural beauty&lt;br&gt;Haven’t been there before&lt;br&gt;Isolated but with access to supporting infrastructure</td>
<td>Cradle Mountain, Flinders Ranges</td>
</tr>
<tr>
<td>Cycle touring</td>
<td>Retired male—Melbourne&lt;br&gt;Enjoys cycling with a group of friends&lt;br&gt;Around one week</td>
<td>Mainly intrastate&lt;br&gt;Interesting countryside&lt;br&gt;Secure/good roads&lt;br&gt;Supporting infrastructure/hotels/ (wineries for some)</td>
<td>Ararat, Mt Buffalo, East Gippsland, Great Ocean Road, Penola (South Australia)</td>
</tr>
<tr>
<td>Bushwalking</td>
<td></td>
<td>Remote/wilderness&lt;br&gt;Unique scenery&lt;br&gt;Supporting infrastructure&lt;br&gt;Security</td>
<td>Grampians, Wilson’s Promontory, Tasmania, Milford Track NZ, Flinders Ranges</td>
</tr>
<tr>
<td>Bushwalking/camping</td>
<td>Young couple</td>
<td>Bush/national park/ beach</td>
<td>Grampians</td>
</tr>
</tbody>
</table>
Chapter 6

MARKET PARTITIONS FOR AUSTRALIAN HOLIDAY TRAVEL

The choice of destination—and the importance of the destination in the travel decision process—will be determined by the consumers goals, the travel context, situational constraints and the extent to which the travel decision is determined by the consumers needs or the needs of others in the travel party: in particular, the needs of children. These elements will converge and crossover to a degree and the specification of a set of discrete product ‘categories’ is an artificial process to some extent. The specification of market partitions and the choice alternatives that apply provides a basis however for the specification of a salience based model of destination choice and a framework for thinking about product development, the competitive environment and communication issues.

On the basis of this current qualitative research, and the supportive literature reviewed in Chapter 3, the following categories of Australian domestic travel are proposed.

<table>
<thead>
<tr>
<th>Category</th>
<th>Benefits sought</th>
<th>Context</th>
<th>Attributes</th>
<th>Choice alternatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active/adventure</td>
<td>Adventure/activity focus</td>
<td>Couples/friends.</td>
<td>Walking, cycling</td>
<td>Outback/4WD trails</td>
</tr>
<tr>
<td></td>
<td>Social/relatedness</td>
<td>Males may travel with group of male friends</td>
<td>4WD, hunting, sport</td>
<td>Walking trails—</td>
</tr>
<tr>
<td></td>
<td>May be competitive</td>
<td>Activity/experience determines choice of</td>
<td>fishing</td>
<td>Overland Track</td>
</tr>
<tr>
<td></td>
<td>‘Trophy’ experiences</td>
<td>destination</td>
<td>Sailing</td>
<td>Sailing—</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Golf</td>
<td>Whitsundays.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Events</td>
<td>Mass participation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>cycling event—</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Great Ocean Road</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Range of destinations linked to the activity</td>
</tr>
<tr>
<td>Beach resort</td>
<td>Relaxation</td>
<td>Short break for couple/friends/families</td>
<td>Sun and sand activities</td>
<td>Port Douglas, Noosa,</td>
</tr>
<tr>
<td></td>
<td>Sensory gratification</td>
<td>Will access interstate markets through</td>
<td>based activities</td>
<td>Broome, Coolum, Hamilton Island, Gold</td>
</tr>
<tr>
<td></td>
<td>Lifestyle/good living</td>
<td>direct flight access</td>
<td>Restaurants and cafes</td>
<td>Coast, Byron Bay</td>
</tr>
<tr>
<td></td>
<td>Relatedness</td>
<td>Resort may be choice object.</td>
<td>Activities for</td>
<td>Incl. overseas—</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>children</td>
<td>Bali, Fiji</td>
</tr>
<tr>
<td>City break</td>
<td>Sensory gratification</td>
<td>Short break</td>
<td>Nightlife/</td>
<td>Melbourne, Sydney,</td>
</tr>
<tr>
<td></td>
<td>Excitement</td>
<td>May involve catching up with family/friends</td>
<td>entertainment</td>
<td>Brisbane, Adelaide,</td>
</tr>
<tr>
<td></td>
<td>Relatedness</td>
<td>Travel as couple or group of friends</td>
<td>Restaurants</td>
<td>Perth, Canberra,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Museums/galleries.</td>
<td>Hobart</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Festivals and events</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>Shopping</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Interesting attractions</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>within day trip</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Benefits sought</td>
<td>Context</td>
<td>Attributes</td>
<td>Choice alternatives</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Drive touring</td>
<td>Discovery</td>
<td>Travel with partner or friend/s. Trip will be 1 week to 3 weeks. May incorporate another goal or holiday type e.g. an event, wine region, wilderness escape. Focus is on touring routes and regions rather than specific destinations.</td>
<td>Plenty to see and do No long boring stretches Nature/food and wine Interesting towns</td>
<td>Great Ocean Road, Tasmania, New Zealand, South Western Australia, Robe/Barossa/Clare Valley (itinerary built on food and wine associations)</td>
</tr>
<tr>
<td>Family and friends</td>
<td>Relatedness</td>
<td>Family or extended family—often annual—1 week to 2 weeks Less discretionary Will return to same place year on year</td>
<td>Range of activities. Will please all members of the family. Not too far to drive. If interstate direct flight access.</td>
<td>Beach locations—rented house / unit. Resort—with child care facilities—secure. Theme parks e.g. Gold Coast</td>
</tr>
<tr>
<td>Iconic nature</td>
<td>Discovery</td>
<td>Longer duration May be alternative to overseas trip Couples, younger friendship groups, families May form basis of round Australia trip May also fly direct and stay and / or take a tour</td>
<td>Well known—unique scenic attractions World heritage</td>
<td>Uluru, Kakadu, Bungle Bungles/Kimberly, Ningaloo Reef, Daintree, Whitsundays, Port Douglas (Great Barrier Reef)</td>
</tr>
<tr>
<td>Wine region</td>
<td>Sensory gratification 'Lifestyle / good living’—similar to beach resort in this respect Celebration Relatedness Relaxation</td>
<td>Short break for couple/friends—particularly in cooler weather Hedonistic daytrips Unless there is access to interstate flights may be primarily intrastate/day trip or component of a longer touring holiday</td>
<td>Wine tasting B&amp;B accommodation Restaurants and cafes Art galleries Cycling/walking trails Food and wine events</td>
<td>Barossa, Clare Valley, McLaren Vale, Yarra Valley, Hunter Valley, Margaret River</td>
</tr>
</tbody>
</table>
A Model of Consideration and Choice for Australian Holiday Travel

Chapter 7

CONSIDERATION AND CHOICE

The results of the qualitative research demonstrate that domestic travel will incorporate a wide range of goals, experiences and choice alternatives. Goal structures were fluid within individuals and the destinations considered were variable on this basis.

"We usually have a family holiday, then usually an exploring holiday, where we go somewhere new, and find out about that place, and then usually just five days where I’ll go to a health retreat and to get relaxed, back in focus and fit again, so usually three holidays a year." Female, 35–54 years, North Shore Sydney

It was evident that consideration of a destination will be influenced by word of mouth and more broadly by references to the destination through the media, the digital environment and other sources – which may not necessarily be in a travel context.

"I suppose it easier to think yes let’s go to Sydney because it’s a lot easier to think of stuff to do in Sydney because the national media focus is more on Sydney than Adelaide. So people go Adelaide, what do you do there. To an extent they do that. Sydney once again there is the Harbor Bridge and the Opera House. Sydney is just the first thing that comes to mind because it’s where everybody else goes." Young male, 20–34 years, Melbourne

"You see so much on television and read so much about it and talk to people who have been and it just seems like a place to go to and see country and I like looking at scenery." Male, 35–54 years, Melbourne talking about Tasmania

"I guess I have never heard anybody say South Australia is amazingly beautiful. It may well be but actually when I go there I will probably think it is, but people remark so much about somewhere like Tasmania." Female, 20–34 years, Sydney

"I have been to Fremantle and Perth many years ago… But we hear so much about how enjoyable it is. People talk about it more than Adelaide by the way." Retired male, Sydney

The research suggested that for certain types of travel the destination may be a secondary consideration when weighed against factors such as the activities offered, price, security, travel distance and access. In this circumstance the consumer may choose from a set of resort packages or experientially focused tour offerings and the consideration set will not necessarily be constructed from destinations as competing ‘brands’. A travel brand for example might be a resort, for example Club Med where the destination is an attribute of the brand—Club Med Lindeman Island, Hyatt Regency Coolum.

The travel brand may also be a wholesaler, such as Qantas Holidays, with the product offerings a series of packaged tours in which the destination may be one attribute along with price and accommodation.

The type of travel in which the destinations appear to most closely function as brands was discovery orientated travel. This was also the type of travel in which the decision process appeared to approximate the process of choice described by Um and Crompton (1992) in which respondents had a set of places they wanted to visit with a prototypical or ‘dream’ destination at the top of the list and a ‘graded’ preference structure associated with the other destinations and the final choice of destination determined primarily by constraints.

"I may have 3 or 4 things on the list but I can only get a week off of work then I will go ‘oh okay well that one suits my plans better’. The one that takes two weeks will still be there and if I get two weeks then I will take that one." Male, 35–54 years, Melbourne

"That was a bit of a sacrifice in lots of ways (returning to study) because I knew I wouldn’t be working enough to have enough money really to go overseas. So I thought well this is a chance to see Australia which is something that I haven’t really done I haven’t been to that many places."

Female, 20–34 years, Sydney

Destinations associated with beaches, scenery and/or ‘good living’ may also be more likely to function as brands e.g. Noosa, Gold Coast, Barossa.
The results of the qualitative research suggest that conscious evaluation of a set of destinations was rare. It was more likely that the most desired destination would be investigated and if that option was rejected the next place on the preference list would be researched. The process was sequential evaluation rather than evaluation of a competitive set at a point in time.

In a number of instances there was evidence that for family holidays familiarity is highly valued and families will return to the same place year after year if they are satisfied with the destination.

*I mean, Andrew’s sister they have just been to, about twelve months ago they went to the Sheridan in Fiji and they said that after spending ten years at Coolum for a similar experience it wasn’t worth the effort going to Fiji ... But they just thought they would try something different, and for a very similar experience it wasn’t worth the five hour flight, save your money and go to Coolum. We are quite influenced by these people closest to us.* Female, 20–34 years, living with spouse and young children, Lane Cove

For the activity focused categories, destination choice was mediated through the linkage between the destination and the experience and there is potential to brand destinations in this context through appropriate product development and linkages.
Chapter 8

IMPLICATIONS FOR DESTINATION MARKETING

The primary objective of the research was to describe a category framework for domestic holiday travel taking into account consumer goals and travel context. For some categories of domestic travel such as family holidays it would appear that there are high levels of repeat visitation to familiar destinations and there is limited search and evaluation of alternative destinations and limited opportunity to influence behaviour change through destination branding. For other categories such as wellness retreats, resort based experiences and experiential travel, search and evaluation may occur at the product level where the geographic location may function as an attribute of the product rather than an independent or overarching destination brand.

From a state marketing perspective, states or territories were generally not evoked as choice alternatives with the exception of Tasmania where the whole island is established as a drive experience. While Western Australia was referred to as a state in some instances it was primarily conceived as two regions—Broome / the Kimberly and the southern area consisting of Perth/Margaret River/Albany. Other places were generally evoked as regions, coastal resorts or cities/towns while drive routes and iconic train journeys may also have been described as travel options.

The promotion of domestic tourism in Australia is undertaken primarily by state and territory tourism organisations with marketing communication generally promoting the states and territories as destination brands with a range of regional level sub-brands sitting under the state /territory banner. The findings presented in this report suggest that this approach may be inefficient as it does not reflect the way in which consumers think about domestic travel.

With perhaps the exception of Tasmania, state and territory communication strategies may be more effective if branding is constructed bottom up from those experiences, places and touring routes that are most likely to evoke the state/territory in a way that is salient to their needs as opposed to a broader based top down strategy in which the consumer is presented with a set of generic state/territory images. For example, if a wilderness bushwalking experience in the Flinders Ranges is perceived to be a key opportunity for South Australia then above the line communications should build awareness of the Flinders Ranges as a destination linked to this experience rather than expecting consumers to respond to more generic communication and develop this association as a component of the State brand through below the line elements such as the web or brochures.

Under the salience model brand attitude is primarily an outcome of experience and familiarity. Appropriate product development and service delivery will therefore be an important component of marketing strategy to ensure that visitors are satisfied with their experience. For many regions the destination brand may be most effectively operationalised through service delivery and ensuring that operators are committed to a consistent brand promise.
REFERENCES

A Model of Consideration and Choice for Australian Holiday Travel


APPENDIX A: INTERVIEW GUIDE

Lowercase – spoken questions / prompts
Uppercase – interviewer instructions

INTRODUCE SELF AND OBTAIN WRITTEN PERMISSION TO PROCEED.

The objective of this interview is to explore how people think about holiday travel in Australia. The interview is relatively informal so please say anything that comes to mind in response to the questions no matter how insignificant or irrelevant it might seem. I’ll take a few notes but your responses will be captured on the audiotape so I’ll have plenty of opportunity to go over your answers later on. Again please be assured that your responses will be treated with strictest confidence and the tapes will be destroyed once the interviews have been transcribed. Information that could identify you as the respondent will not be retained with the transcript.

1. I’d like to start off with your last holiday in Australia. Can you describe that holiday for me?

PROBE:
- PLACES VISITED
- TRAVEL GROUP
- TIME OF YEAR
- MODE OF TRANSPORT
- LENGTH OF TRIP
- ACTIVITIES/BENEFITS SOUGHT

2. Are you thinking about your next holiday in Australia? Can you describe that holiday?

PROBE:
- PLACES
- TRAVEL GROUP
- TIME OF YEAR
- MODE OF TRANSPORT
- LENGTH OF TRIP
- ACTIVITIES/BENEFITS SOUGHT

3. Can you recall anything you’ve recently seen or heard about Australian holiday destinations?

PROBE FOR CIRCUMSTANCES:
- WHAT WERE THEY DOING?
- WHEN WERE THEY DOING IT? – TIME OF DAY / DAY OF WEEK
- WHERE WERE THEY?
- HOW WERE THEY FEELING AT THE TIME?
- WHO ELSE WAS THERE?
- WHAT MEDIA WERE PRESENT IN THAT ENVIRONMENT EG NEWSPAPERS, TV, MAGAZINES, INTERNET?
- SPECIFIC PRODUCT OFFERS—PACKAGES, AUCTIONS, DEALS?
- WHAT OTHER ELEMENTS WERE PRESENT IN THE SITUATION?

WHAT DO THEY DO FOR GENERAL RECREATION—DOES THIS INFLUENCE LIKELIHOOD OF CONSIDERATION.

4. So thinking about your last holiday—or the one you’re currently planning—can you say what other places you might have been thinking about. Also include any overseas destinations.

5. What places did you seriously consider?

6. Why do you think those places were more seriously considered?
7. What research did you do before making your final decision?

PROBE:

- NAME OF TRAVEL AGENT, BROCHURES, WEB SITES ETC

8. Can you recall how you made the final decision about the place/s you ended up selecting for your holiday (or you are most likely to visit if considering a holiday in the next six months)? PROBE FOR DETAIL RE: EVALUATIVE ATTRIBUTES & CONSTRAINTS

SUMMARISE DECISION PROCESS AS A DECISION TREE AND CHECK WITH RESPONDENT WHAT IS THE TIME PERIOD OVER WHICH THE PROCESS OF CONSIDERATION TAKES PLACE?

PICTURE ASSOCIATION—PASS IMAGE SET TO RESPONDENT

9. I’d now like you to look through these images of Australian holiday destinations and pick out the four images that you find most attractive.

RECORD THE IMAGE REFERENCES AND PROMPT WITH THE FIRST SELECTED IMAGE

10. And what comes to mind when you look at this image. PROBE FOR DETAIL

11. Is there anything particularly different about this image when compared to the images you didn’t select?

PROBE FOR DETAIL

FOR EACH DIFFERENCE—Is this difference important? IF YES—Why? USE LADDERING PROCEDURES TO PROBE FOR EVALUATIVE CONSTRUCTS.

12. Do you associate these images with any particular part of Australia? IF YES—SPECIFY

REPEAT QUESTIONS 10, 11 & 12 FOR EACH SELECTED IMAGE.

13. I’d now like you to look through the images and pick out the four images that you would associate with your last holiday in Australia (or the holiday you are planning).

COMPARE IMAGES SELECTED WITH THE IDEAL SET AND ASK RESPONDENT TO EXPLAIN REASONS FOR ANY DIFFERENCES BETWEEN THE IDEAL SET AND LAST HOLIDAY SET.

IF TIME IS AVAILABLE ASK RESPONDENT TO CONSIDER ANOTHER SPECIFIC DOMESTIC HOLIDAY AND REPEAT QUESTIONS 2 THROUGH 8 IN REGARD TO THAT HOLIDAY.

THANK RESPONDENT AND ASK WHETHER THEY HAVE ANY FURTHER COMMENTS OR QUESTIONS REGARDING THE RESEARCH
Notes:

Cognitive Interviewing

Using CI techniques the interviewer will:

- explore the physical and personal contexts of relevant events;
- extensively probe for detail—as spreading activation will trigger further associations;
- ask respondents to recount events in a variety of orders;
- ask respondents to recount events from the perspective of others (self, partner, children).

CI also emphasizes social communication techniques which involve:

- transfer of control from the interviewer to the interviewee;
- use of open ended questions;
- not interrupting the respondent;
- timing questions with respondents’ retrieval patterns—i.e. questions should not break the respondents’ chain of thought.

Projective Picture Sort

To explore the relative importance of constructs respondents are prompted to explain why particular differences are important. For example, a destination may be regarded as more exciting than another. When asked why that is important the respondent might suggest that it is exciting because ‘it’s a chance to meet new people’. Further probing might elicit that it is ‘a change from the usual routine at home’.

The use of why questions take the interviewer ‘up’ the ladder to those constructs which are central to their personality and motivational structure. The following strategies may be used to facilitate the laddering process. These include:

- evoking situational context
- negative laddering (probing why consumers don’t do or feel certain things)
- moving backwards in time to consider changes in behaviour or attitude
- third person perspective: how would someone else view this behaviour or attitude
- reflecting and silence to elicit further detail.
A Model of Consideration and Choice for Australian Holiday Travel

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Introduction
The STCRC has grown to be the largest, dedicated tourism research organisation in the world, with $187 million invested in tourism research programs, commercialisation and education since 1997.

The STCRC was established in July 2003 under the Commonwealth Government’s CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities
The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC’s objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia’s sustainable economic and social development;
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;
- the value of graduate researchers to Australia;
- collaboration among researchers, between researchers and industry or other users; and efficiency in the use of intellectual and other research outcomes.