SHORT-BREAK HOLIDAYS—
A COMPETITIVE DESTINATION STRATEGY

Peter Murphy, Outi Niininen and Dale Sanders
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Abstract

This project examines the short-break market in Australia at a time when the industry wanted to know more about this form of tourism and the country was reeling from the initial shocks of the global financial crisis. The preliminary materials gathered from focus group sessions with experienced participants along with information from parts of the industry already involved with short-break holidays revealed a robust market segment which is enthusiastic about this form of tourism and is optimistic about its future. This information was used to construct a general telephone survey of Australians regarding their views on domestic short-break holidays, to provide a more complete and balanced assessment of this type of vacation and its opportunities for present and potential destinations. The national survey revealed short-break holidays have become a popular and widespread option in Australia. They have different meanings depending on an individual’s life cycle and place of residence, and are sufficiently varied to make them a tourism option for many destinations. The study concludes with some recommendations based on the observations of researchers across the country plus the national survey.

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Finally, the authors and their colleagues would like to thank those members of the public who gave so generously of their time and insights, and to those industry representatives who took the time to talk with us and share the facts of life in this ever-changing tourism world.
SUMMARY

STCRC defined a short-break holiday in its initial announcement as ‘a non-business trip of between one and four nights away from place of residence (home)’. Neither the industry nor the consumers had a clear idea what a short-break holiday is, so it is recommended that the industry tighten its definition to 2 – 4 nights in one destination. This will facilitate future marketing and management of this tourism product and help to distinguish it from other tourism offerings.

Objectives of Study

- Examine the short-break holiday market in Australia.
- Conduct a national consumer survey of the Australian public’s interest in domestic short-break holidays.
- Examine the early awareness of the new No Leave, No Life promotional campaign.
- Relate findings to potential destination strategic management.

Methodology

- A two stage research design that incorporated a national research team and a commercial market research company.
- Stage 1 involved a series of consumer focus groups and industry interviews around Australia conducted by academics from seven universities. These presented the views of eager consumers (aficionados) and relevant industry sectors on Australia’s current short-break holiday situation. Their information, along with themes from the academic literature, presented input into the national survey questionnaire.
- Stage 2 was a national telephone survey conducted by NWC Opinion Research in Melbourne. They reached 2005 adults aged 18 years and over across Australia. The data were weighted up to the latest ABS population statistics which estimates the population aged 18 and over to be 16.4 million.
- The telephone survey examined the public’s experience and non-experience with domestic short-break holidays, their motivation and decision-making in the process, and what competes for their attention and resources in this regard. This information is examined through cross-tabulations with various household characteristics used to identify significant national characteristics within the given responses.

Key Findings

- The literature review revealed short-break holidays are an expanding global phenomenon, attributed to more complex and stressful lifestyles within affluent societies. To date most short-break holidays have been undertaken as an addition to the traditional annual family holiday. They have been used to get away from life’s routine and usually involve a few days away from home in a nearby regional or national destination.
- Although this study was conducted during a year of global financial crisis short-break holidays still remained a popular tourism option in Australia, with 54.9% of sampled respondents reporting they took a domestic short-break holiday over the past year.
- There are two principal motives for taking domestic short-break holidays, the strongest is a desire for rest and relaxation followed by the pursuit of some specific interest. These are not mutually exclusive motivations and the options in both categories are numerous. An example of this combined approach is when many individuals attached a short-break holiday with a chance to visit with friends and relatives.
- Most Australians stay in one destination for an average of three nights on their short-break holiday over the past year.
- The dominant form of transport on these holidays is the car, but air travel becomes more important for long distance destinations.
- Those respondents living in metropolitan areas highlighted escapism and relaxation as the prime reasons for their trips to coastal or regional destinations; whereas those living in the regions were attracted to capital cities as well as the coast, and often undertook personal business and family visits in addition to tourist activities on such occasions.
- The length of planning time is relatively short for short-break holidays and the Internet is becoming a major information and booking source.
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- When respondents received a financial windfall, such as the recent government stimulus package, relatively few of them spent it on any form of holiday.
- The awareness level of the government’s No Leave, No Life campaign was small (10%) in August – September 2009, when the campaign was in its infancy.

Future Action

- Neither the industry nor the consumers had a clear idea what a short-break holiday is, so it is recommended that the industry tighten its definition to 2 – 4 nights in one destination. This will facilitate future marketing and management of this tourism product and help to distinguish it from other tourism offerings.
- A key to engaging this market is convenient access. This includes access to information on what is available at a destination (web pages and one stop shopping); easy access by car or plane, with particular reference to the expanding LCC network; and access to local attractions (public transport and packaging) when at their destination.
- The importance of a visiting friends and relatives (VFR) connection to short-break holidays reveals the opportunity to influence both destination visits and activity through communication via these local hosts.
- The wide range of short-break special interests exhibited in the national survey indicates that many communities can become short-break destinations, not just the capital cities and major coastal resorts.
- Short-break destinations will need to differentiate themselves in a growing competitive market and it is best to achieve this through image building and branding.
Chapter 1

INTRODUCTION

This study is in response to a Sustainable Tourism Cooperative Research Centre (STCRC) call for expressions of interest (EOI) in conducting an examination of Australia’s short-break holiday market in terms of assisting destinations with their competitive strategies. This specific niche market is an important component of the overall domestic market, which has been growing globally and is expected to become a more significant component as lifestyles change and the impacts of the global economic downturn become more evident in certain parts of the world.

STCRC defined a short-break holiday in its initial announcement as ‘a non-business trip of between one and four nights away from place of residence (home)’. No justification was provided for this definition, but it has been taken as the starting point in this study.

The focus of the project was identified in the EOI announcement as the development of ‘a competitive destination strategy’, with the presumed goal of providing current and potential ‘short-break’ Australian destinations with some guidelines as to how to differentiate themselves and become more attractive to this market. Generally speaking, it is certainly an attractive market in that it has grown considerably over the past 20 – 30 years, it often provides a weekend market to supplement the weekday business tourism, it is increasingly filling out shoulder seasons and providing some event related peaks in the off-season, and if we are to experience a lengthy recession it is likely to become a viable alternative to the traditional 2 – 3 week family vacation. In addition we were asked to consider Tourism Australia’s No Leave, No Life marketing campaign, which was released to the public during the later months of this project in the form of large holiday-marketing inserts in major national papers.

To tackle these various objectives this project was designed to be a collaborative research exercise, involving CRC universities in each state and territory. Those participating included La Trobe University (representing Victoria, and as it turned out South Australia), the University of New South Wales (NSW), James Cook University (Queensland), Edith Cowan University (Western Australia), University of Tasmania (Tasmania), University of Canberra (ACT), and Charles Darwin University (NT). It was undertaken in two related parts.

Stage 1 involved the development of a literature review, a consumer perspective gathered by conducting short-break holiday-maker focus groups in each state and territory; and industry interviews with components active in this area of tourism. Stage 2 built on the results from Stage 1. It involved a national telephone survey of consumers (both users and non-users of Australia’s short-break holiday opportunities) and was designed to determine their decision-making, their images and behaviour patterns for this type of holiday. The results of this major survey complemented and rounded out the more specific information generated in Stage 1, and led to some observations about the future of Australia’s short-break market and some recommendations for the local tourism industry.
Chapter 2

USEFUL INDICATORS FROM THE LITERATURE REVIEW

The logical place to start this study was to conduct a literature review of academic-, government- and popular press-articles and reports to uncover what is known currently about this particular tourism subset and what, if any, patterns and theories have emerged from this previous work. The discovered references are presented in an annotated bibliography which covers six topic areas—Segmentation Issues, Consumer Decision-Making, Consumer and Host Community Experiences, Travel and Access Issues, Competitive Destination Strategies, and Industry Planning and Policies (Appendix A). An annotated bibliography goes beyond a bare list of references to provide a short summary of the contents and in some cases the merits of each reference, so that the reader may develop a clearer understanding of what this past work has revealed or left unanswered about short-break holidays. This section focuses on the major themes and issues which have emerged and has been used to structure the questions in the national phone survey. Many sources are provided in the review below and if the reader wishes to follow-up on any of them their full details can be obtained by referring to Appendix A.

The first aspect to be investigated by the literature review is the very existence of a short-break market segment, and how it is defined so it may be differentiated from numerous other segments. One common theme is that there has been relatively little attention paid to this aspect of tourism, as noted by Tsiotso and Vasioti (2006: 65) who claim ‘short-term visitors have not been studied adequately in (the) travel and tourism literature’; and by Davies (1990: 103) who states ‘It is difficult to determine what a short-break is, largely because the travel industry itself is not prepared to agree on a definition’. This comes from European researchers, where the bulk of the short-break growth and academic interest in this phenomenon has occurred to this time. Boerjan (1995) has even queried whether we need to differentiate between a short or long holiday, but after his investigation of 400 Flemish travellers decides there is a significant difference between the two types of holiday-maker. He observes the principal objectives for the short-break holiday is to have a break from routine, be it in the form of a rest or intense activity with a specific focus; and those taking such short-breaks use domestic destinations in the main with relatively little pre-planning. However, he is not too definite about the length of these holidays, referring to ‘just a few days’, but if ‘one wished to make a black and white division … (then this sample indicates) … a weekend and a long weekend makes a short trip and one week and more is a long holiday’ (Boerjan, 1995:12).

The lack of a universal definition for a ‘short-break holiday’ is compounded by whether the topic is viewed from a demand or supply perspective. Most of the references have taken a consumer demand perspective, where the choice of a short-break holiday is variously described within the parameters of 1 – 6 nights, confirming the notion that it is a short-break from normal routine. However, for destinations, representing the supply side, there is a big difference in attracting and satisfying a one night visitor, who is traditionally viewed as an ‘overnight’ or ‘in-transit’ visitor; and a visitor who stays a number of nights and wishes to explore the area and take in a number of attractions or events. In this case a short-break holiday-maker is better described as one who stays 2 – 4 nights and provides the destination with the opportunity to promote and even package local features. One paper in favour of adding a new time dimension to the identification of the short-break segment is Uysal and McDonald’s (1989) call for the use of a trip index to distinguish between those who are sedentary and those who are mobile during their break.

What appears to be a homogeneous group when a single dimensional analysis is used, such as the traditional use of ‘number of nights’, becomes a more complex and varied group when additional features are examined (Carmichael, Smith and Canally, 2006; Dolnicar and Fluker, 2003; Yannopoulos and Rotenberg, 1999; Wang, Norman and McGuire, 2005). These few papers have identified behavioural differences between supposedly homogeneous groups like sport tourists, surfers, or in comparisons between near-home and distant travellers, and when seniors are compared with young travellers. This clearly illustrates that destinations need to focus on those elements within the short-break market they are best suited to attract and satisfy.

The motivation for short-break holidays are equally varied, though several authors have identified two principal objectives—temporary rest and relaxation or relatively intense activity associated with a specific focus, be that sport, culture and heritage or an event (Boerjan, 1995). This division suggests two broadly based marketing and management approaches across the array behavioural differences noted above, namely one for those who look for a slow and sedentary pace while others are physically active pursuing their particular interest.

One of the principal motivations for short-break holidays is to visit friends and relatives (VFR market) which provides constraints and opportunities for host destinations (Hudson and Ritchie, 2002). In many cases the
number of short-break holiday-makers undertaking a VFR is in excess of 50%. This means that commercial accommodation will not be required by many (Middleton and O’Brien, 1987), and that food and beverage outlets can expect a special type of demand, such as the one big ‘thank you’ meal from the visitors and increased food and alcohol purchases by the hosts. However, local hosts provide an opportunity to influence the visitation patterns of short-break visitors by having them act as facilitators and local guides (Gitelson and Kerstetter, 1994; McDonald and Murphy, 2008), a topic that needs further research and development.

Several authors have noted a destination can best take advantage of this short-break market if it tailors its offerings specific to this market (Lohmann, 1991; Davis and Sternquist, 1987; Zouni and Kouremenos, 2008). One European company which epitomises this approach is the successful ‘Centre Parcs’ operation, which has identified two principal segments for its nature based and health tourism approach; namely a business-oriented subgroups of traveller on a single ‘no frills’ airline flying out of New Zealand. They also observe that the budget market based on conferences and seminars over four nights of the working week (Monday to Thursday) and a recreation and recuperation market for the weekend’s three nights (Friday to Sunday), according to Jones (2002).

While the traditional multi-variable model of consumer choice patterns for tourism is still acknowledged, several authors consider that some form of simplified decision-making process is to be expected in situations where the mental, financial and physical investment is not as great as with a traditional annual vacation (Blichfeldt, 2007). Huybers (2003a and 2003b) has demonstrated this with his two separate studies of Melbourne and Sydney’s short-break decision-making, although these two capital cities have different marketing emphases yet again. Others such as Raybould, Digance and McCullough (1999) and Pike (2002, 2003) have identified relatively few key determinants for short-break holiday decision-making, which would suggest it fulfils a simpler and more fundamental market need than other forms of vacation.

The ideal economic position for a short-break holiday destination is to utilise existing and under-used capacity (Davies, 1990), which is how this market started in the UK and Europe: as a way to complement and supplement the business market of city hotels on the weekends. Edgar (1997:55) feels the short-break hotel market has ‘evolved from the off-peak weekend break to a market in its own right and as such, has generated further interest and recognition’. In fact by 1985 an estimated 33 million short-break holidays were undertaken in the UK, but by then the concept had outgrown its initial source of inspiration for it is noted that only 17% of the short-break holiday-makers actually used hotel accommodation (Teare, Davies and McGeary, 1989). Thus other businesses and whole destinations have begun to realise the benefits of this market and are competing for its business.

Some authors point out that at this stage of development host destinations should be looking for more than an economic return from the short-break market, they should be focusing on quality of life (QoL) issues for the consumer, the community and the industry worker. Moscardo (2009) feels a QoL approach would help both customers and suppliers develop a more balanced assessment of what they want and what should be provided, and that the total impact needs to be assessed if the host community is to develop a lasting and acceptable tourism business. Along similar lines Deery and Jago (2009) point out that if Tourism Australia’s No Leave, No Life campaign is a success it will transfer stress from one sector of the population to another, with the tourism industry facing increased demands upon its resources and staff.

In Australia we are familiar with ‘the tyranny of distance’ concept as it applies to long-haul international travel, but this distance decay function does not necessarily apply to the short distances associated with many short-break holidays. Several authors have examined whether the traditional drop in visitation with increasing distance from the source applies on the domestic scale, when many are driving and could find benefit in the scenery and other aspects of the trip: like local wine and food purchases (Walsh Sanders and McKean, 1990; McKean, Johnson and Walsh, 1995). McKercher (1998 and 1998) used the Princes Highway between Melbourne and Sydney as a test case, and found there was a small rise in visitation between Melbourne and Lakes Entrance, followed by a plateau of visits through to NSW’s Sapphire Coast, and only then did the expected theoretical decline in visitation occur—all the way to Sydney. One of the reasons for the initial rise of visitor traffic away from Melbourne was considered to be the general attraction of a rural/coastal getaway; and for the stability around the Sapphire Coast to be the overlapping market influence of Canberra, which boosted local demand and thus negated the expected steady fall in visitation as one left Melbourne behind.

The influence of budget airlines or low cost carriers (LCC) is beginning to be examined by academics and some interesting factors are starting to emerge. Once again we find a convenient segmentation label like ‘LCC traveller’ hides a variety of significant subsets. One of the early studies by Ryan and Birks (2006) identifies four subgroups of traveller on a single ‘no frills’ airline flying out of New Zealand. They also observe that the budget traveller may have different airport facility preferences compared to the full service airline travellers. Finally, they note that a growth in regional tourism through a LCC-regional airport partnership is not assured, but will require careful development, packaging and promotion. Along the same lines Francis, Humphreys and Ison
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(2004) claim there is no single business model for regional airports because of their different ownership forms and geographical contexts, plus they warn of the volatility of the low-cost market and the need for airports to find alternative revenue streams if they lower landing fees to attract LCCs.

Competitive destination strategies are an important aspect of this project and like the EOI announcement states we found limited evidence of this concept being applied specifically to the short-break holiday market segment. The concept has its origins in the business literature, with special attention being given to Porter’s contribution. However, in recent times some authors have attempted to modify and expand upon Porter’s ideas and link the concept of competitive advantage to tourism destinations. Ritchie and Crouch (2003) have summarised the past business models and integrated them into a model of destination competitiveness which contains five key determinants—destination policy, planning and development, destination management, core resources and attractors, supporting factors and resources. They have structured their model in the form of a performance audit, and because their model is a generalisation they claim it should not be used in a cookbook fashion, but be open to local variations and nuances. There have been several attempts to use this model in terms of general tourism, but the closest we come to a short-break situation is the Hudson, Ritchie and Timur (2004) study of Canadian ski resort competitiveness.

In Australia the competitive destination analysis baton has been taken up by Dwyer (Dwyer and Kim, 2003; Dwyer, Liviac and Mellor, 2003; Dwyer, Mellor, Liviac, Edwards and Kim, 2004) who has attempted to balance the supply-side emphasis of the Ritchie and Crouch model with a more significant demand element, and he has resurrected the comparative advantage element in recognition of the importance and attraction of a destination’s ‘sense of place’. Dwyer and his colleagues have developed a major data set, which has enabled them to ask a variety of questions. This seems to confirm the general applicability of the model at the international level using large scale aggregate measures. But as the EOI call indicated, the smaller scale of regional destinations and a specific market subset has yet to be tested. Faulkner, Oppermann and Fredline (1999) did some earlier work on examining the competitive position of one region—South Australia within its national market. They found that South Australia’s declared core attractions offered relatively limited competitiveness in the eyes of travel agents, and they recommended that the study be repeated with a large scale consumer study, which is our intention in this project.

There has been some regional testing of the competitive advantage concept and in relation to the short-break market, but in the original domain of short-break holidays—the U.K. hotel industry. Edgar has led this charge, developing a data set relating to the ‘30 largest hotels in Scotland’ and how they have attempted to use the short-break market in a ‘defender’ or ‘predator’ role, to maintain or develop their competitive advantage (Edgar, Litteljohn and Allardyce, 1994; Edgar, Litteljohn, Allardyce and Wanhill, 1994; Edgar 1997). Edgar states that competitive advantage comes from creating value for buyers which exceeds the costs of generating it, and is a keen advocate of packaging the short-break product to produce the benefits of Porter’s ‘focus’ dimension.

One theme that is becoming stronger in the literature is the need for greater collaboration between stakeholders to make a destination stand out in the increasingly competitive market place. There is a call for more stakeholder collaboration built around consensual objectives concerning which resources to promote and develop in terms of specific target markets (Murphy and Murphy, 2004; Baker and Cameron, 2008; Fyall and Leask, 2007). This can best be seen in terms of the short-break holiday market through the growing enthusiasm for some form of packaging, to make the planning easier for the consumer, providing a better value product, and involving more elements so the consumer is encouraged to stay longer. Hooper (1995) relates how packaging has become varied and sophisticated and according to anecdotal evidence most successful, but as yet this topic has not received much independent academic assessment.

In summary, the literature review revealed the following issues and deficiencies:

- There is no common definition of a ‘short-break holiday’ and this causes difficulty describing and planning for this type of vacation. Most definitions have been presented in temporal terms, while short-break holiday motivation points more in the direction of interests rather than time.
- Consumers generally have a broader view of a short-break holiday, ranging from 1 – 6 nights, while the industry is more focused around 1 – 4 nights and some favour the even tighter range of 2 – 4 nights.
- Short-break holiday-makers are a complex and varied group, not a single homogeneous market. Their variety of interests provides current and potential destinations with a chance to engage this market.
- Destinations need to differentiate themselves and brand accordingly in the increasingly competitive short-break market.
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- The initial short-break holiday focus on off-peak weekend breaks, started by European hotels, has broadened into a more varied product and timetable, but the ideal is still to use short-breaks as a supplement to other tourism and business activities.
- Visiting friends and relatives is an important component of a short-break holiday, yet there has been little examination of the implications and marketing potential of this link.
- Low cost carrier airlines have become a major partner for many short-break holiday businesses and destinations, and the prospect of developing associated packages and regional development requires further exploration.
- The development of competitive strategies for the short-break market will require a combination of consumer analysis and destination planning, which will inevitably require a collaborative effort on the part of the tourism industry.
Chapter 3

RESEARCH DESIGN AND PRELIMINARY INDICATORS

Sample Structure of Stage 1
To obtain a preliminary national coverage of Australia’s existing short-break holiday-makers, representing the demand side, and the experience and views of the tourism industry to represent the supply side in a quick and convenient manner, a series of consumer focus groups and industry interviews was arranged around the country between November 2008 and April 2009. The distribution and structure of these meetings is provided in Tables 1 and 2.

Focus Group Process and Structure
Table 1 shows the distribution of the focus groups held around Australia. Members of the public were invited to attend these two hour evening meetings through advertisements in the local press which sought participation from individuals who had either been on a short-break holiday within the past twelve months or were intending to undertake such a holiday within the next six months. The response to these advertisements was generally good, particularly within the capital cities, but some regional sites had difficulty raising a critical mass, so supplementary methods were used, such as adverts posted in local accommodation sites and using local networks. As a result the process produced a range of individuals across all age groups and at various life cycle stages; but almost all of those in attendance were definitely aficionados of this form of holiday. Thus the input from these individuals must be considered in light of their enthusiastic endorsement of this form of holiday.

Table 1: Focus Group Locations and Structures

<table>
<thead>
<tr>
<th>State/Territory</th>
<th>Location</th>
<th>Number of Participants</th>
<th>Demographic Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT</td>
<td>Canberra</td>
<td>19</td>
<td>Mix of genders, ages, life stages.</td>
</tr>
<tr>
<td>NSW</td>
<td>Sydney x 2</td>
<td>10 + 10</td>
<td>Mix of genders, ages and life stages.</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>Darwin</td>
<td>11</td>
<td>6 f 5 m, mix of ages and life stages.</td>
</tr>
<tr>
<td>Queensland</td>
<td>Townsville x 2</td>
<td>10 + 12</td>
<td>5 f 5 m, young to middle aged. 9 f 3 m, gen Y students.</td>
</tr>
<tr>
<td></td>
<td>Brisbane</td>
<td>4</td>
<td>2 f 2 m, empty nesters.</td>
</tr>
<tr>
<td>South Australia</td>
<td>Adelaide</td>
<td>8</td>
<td>4 f 4 m, 1 single, 4 family, 3 empty nesters.</td>
</tr>
<tr>
<td></td>
<td>Barossa Valley</td>
<td>2</td>
<td>2 f, both empty nesters.</td>
</tr>
<tr>
<td>Tasmania</td>
<td>Hobart</td>
<td>7</td>
<td>3 f 4 m, mostly older empty nesters.</td>
</tr>
<tr>
<td>Victoria</td>
<td>Melbourne</td>
<td>10</td>
<td>5 f 5 m, 2 young, 4 middle aged, 4 seniors, full range of single-family-empty nesters.</td>
</tr>
<tr>
<td></td>
<td>Bendigo</td>
<td>9</td>
<td>6 f 3m, 2 young, 2 mid-aged and 5 seniors.</td>
</tr>
<tr>
<td></td>
<td>Warrnambool</td>
<td>6</td>
<td>4f2m, 2 mid-aged 4 seniors, 2 family 4 empty nesters.</td>
</tr>
<tr>
<td>Western Australia</td>
<td>Perth</td>
<td>8</td>
<td>5 f 3 m, 2 young, 3 middle aged, 3 older.</td>
</tr>
<tr>
<td></td>
<td>Broome</td>
<td>8</td>
<td>4 f 4 m, 3 young, 3 middle aged, 2 older.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>15</strong></td>
<td><strong>134</strong></td>
</tr>
</tbody>
</table>

The national team of researchers was provided with a schedule of recommended questions for these focus groups (Appendix B). Written responses to personal background questions were asked prior to the general open discussion. Six general conversation questions followed, with all participants being encouraged to express their views and experiences, and two regional questions to start more specific questions related to the participants’
Short-Break Holidays—A Competitive Destination Strategy

regional area of Australia. The team members were invited to add their own questions to the last batch, to reflect any regional differences and individual research interests. This procedure was followed on the whole, but within the process individual circumstances and interests provided a variety of approaches so the findings should be viewed as it was intended—a preliminary qualitative examination of consumers’ experiences and interests.

Key features of consumer experiences

Within the wide range of consumer experiences and interests exposed by the focus groups the following themes stood out.

- The users of short-break holidays had no firm definition for this form of holiday, but they did differentiate it from their regular or traditional holiday. The general range was 1 – 7 nights, with most favouring 2 – 4 nights; but there were logical exceptions. For example, the shorter version was favoured by employed persons, while the longer was the choice of the retired; and the relative isolation of Broome and Darwin meant their residents often considered a longer time-frame because of the travel costs involved. One favourite description was ‘three sleeps’ from a Melbourne participant who claimed, ‘the first night you get there, the second night you’ve found your feet and the third night’s just heaven’.

- Most short-break holidays are to a single destination. Most of those destinations are either coastal resort towns or state capitals, with some mountain resorts becoming considerations in the winter months.

- While the majority of short-breaks involved domestic travel, international travel to Asia was undertaken by residents of WA and the NT (Singapore and Bali) or to New Zealand and South Pacific islands by residents of the ACT, Tasmania and the East Coast. Those who took advantage of such opportunities were generally located in the state capitals and had easy access through regular airlines or LCCs, while those in regional centres were much more car/recreation vehicle oriented and generally focused on their own state or nearby states.

- The motivation to get away was either to ‘rejuvenate’, with a break from work and the daily routine, which generally meant an emphasis on relaxation and unwinding; or to pursue personal special activity interests. Those interests could be varied; stretching from VFR and visiting professional specialists; to doing things which could not be done at home—be that going to the theatre, sport events and concerts or going fishing and skiing; or following a particular interest and passion such as shopping, heritage or a hobby/sport. However, leveraging onto business travel is a factor in the NT and northern WA thanks to their isolation and relatively expensive travel costs.

- While there was a great deal of variation in the above responses there were some consistencies in the desired length of travel, general willingness to continue with short-break holidays, what was the influential media and use of the Internet. Most short-break holiday-makers were prepared to travel 3 – 6 hours to their destination, but all emphasised the need for convenient access. Very few were perturbed by the recent rise in fuel prices and the gloomy economic forecasts (fourth quarter of 2008), stating it would not stop them taking short-breaks but might mean one less night and closer destinations. They used a range of media, with newspapers and television providing general introductory information, but it was the Internet that had become indispensible for providing the necessary details and actual bookings.

- The rise of the LCC airlines has been a major reason for the growth in short-break holidays in Australia. Their link with the rise of Internet sales and the development of certain regional airports/destinations has turned many Australians into holiday shoppers and given them the chance to explore this large country.

- Inclusive packages are becoming an attractive option, with travel auctions referred to in several cases.

Industry Interview Process and Structure

To balance the views of consumers, the views of industry sectors involved in promoting and providing this form of holiday were sought through various forms of interview as illustrated in Table 2. The interviews took place over the darkest months of the GFC, when the financial news was bad and many were uncertain about our economic future. Most states and territories were able to provide industry representatives to meet with the various members of the research team for individual interviews of up to one hour; but in NSW a focus group approach was undertaken with a group of industry representatives in a regional setting and in SA we were unable to secure any formal meetings. Nor were we able to penetrate the sales machines of the LCCs and obtain
interviews with management level staff, even after following up personal leads from STCRC and other sources. The final distribution of these industry interviews provided information from 74 representatives from eleven different sectors involved in the tourism industry, and presents views from a variety of backgrounds including the nation’s capital, state capitals, major coastal destinations and small regional destinations.

**Table 2: Industry Interview Locations and Structure**

<table>
<thead>
<tr>
<th>State/Territory</th>
<th>Location</th>
<th>Number of Participants</th>
<th>Representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT</td>
<td>Canberra</td>
<td>8</td>
<td>3 accommodation, 1 attraction, 1 industry association, 1 travel agency, 2 government.</td>
</tr>
<tr>
<td>NSW</td>
<td>Blue Mountains</td>
<td>11</td>
<td>3 accommodation, 3 attraction, 1 event management, 2 restaurant, 1 consultant, 1 government.</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>Darwin</td>
<td>8</td>
<td>2 accommodation, 1 transport, 1 industry association, 1 government.</td>
</tr>
<tr>
<td></td>
<td>Alice Springs</td>
<td>8</td>
<td>1 accommodation, 1 industry association, 1 transport.</td>
</tr>
<tr>
<td>Queensland</td>
<td>Townsville</td>
<td>8</td>
<td>4 accommodation, 3 destination marketing organisations (DMOs), 5 tours, attractions, transport.</td>
</tr>
<tr>
<td></td>
<td>Brisbane</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>South Australia</td>
<td>-</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Tasmania</td>
<td>Hobart</td>
<td>7</td>
<td>2 accommodation, 2 attractions, 1 consultant, 1 tour company, 1 DMO.</td>
</tr>
<tr>
<td>Victoria</td>
<td>Melbourne</td>
<td>9</td>
<td>2 accommodation, 1 transport, 2 government, 2 DMO (Melbourne), 2 DMO Regional.</td>
</tr>
<tr>
<td></td>
<td>Bendigo</td>
<td>3</td>
<td>1 DMO, 2 accommodation.</td>
</tr>
<tr>
<td></td>
<td>Beechworth</td>
<td>1</td>
<td>1 accommodation/attraction.</td>
</tr>
<tr>
<td>Western Australia</td>
<td>Perth</td>
<td>7</td>
<td>3 accommodation, 1 DMO, 1 transport 1 tour operator, 1 government.</td>
</tr>
<tr>
<td></td>
<td>Broome</td>
<td>8</td>
<td>2 accommodation, 1 attraction, 2 DMO, 1 restaurant, 1 transport, 1 government.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12</strong></td>
<td><strong>74</strong></td>
<td><strong>11 Sectors.</strong></td>
</tr>
</tbody>
</table>

All researchers were provided with a guide for these interviews (Appendix C) and once again these were followed to varying degrees. The main themes to emerge under the major headings are outlined below.

**Key features of industry experiences**

**Definition**

- Once again a range of definitions were offered, but this time there was a tighter grouping, with the majority of industry representatives selecting 1 – 4 nights; which happens to be the definition offered by the STCRC’s call for EOI.
- Two other points emerged from the response to this question. First, a general insistence on at least one night to differentiate the short-break traveller from the excursionist/day tripper. Second, there was an emphasis on a single destination.
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- Some of the regions noted there was ‘not a strong understanding of short-break customers’, and that many industry units ‘had little experience with this (short-break) group as a specific segment’. Some industry participants were particularly happy to see us because they felt ‘more research and information on segments such as this’ was needed.
- Finally, we were reminded that the short-break market had an international component which could be developed further in some parts of Australia.

Trends over past five years

- The short-break holiday segment has generally been growing, and this was expected to continue in harder economic times as people select shorter holidays with nearer destinations.
- Some destinations have not experienced substantial short-break growth due to their commitment to the regular corporate/government business (Perth and Canberra) or to their isolation which encourages longer visits (Darwin and Broome).
- Shorter planning horizons or a ‘spur of the moment’ approach has favoured Internet searches and bookings.
- LCC airline schedules to capital cities and major coastal destinations along with ‘last minute’ websites have facilitated this market.
- In some regions the short-break market is linked with a second home market.
- Some concern was expressed about the future of the seniors’ short-break market as the GFC deepened and its effects could linger, while others feel not enough is being done to entice Generation Y and affluent young singles segments.

Strategic positioning

- There are a wide range of activities and attractions that appeal to this market, so many destinations could compete, but it was felt by some that ‘regional destinations will need to develop a wider range (critical mass) of activities and better facilities’.
- ‘Dispersion of the market is seen as essential to the development of regional short-break destinations’, which in many cases means better access and collaboration between small local destinations needs to occur.
- Many destinations are developing festivals and events to attract this market and encourage repeat business.
- There is a need to develop clearer destination images and brands for this market.
- Some destination marketing organisations (DMO) believe the diversity of Australia’s regional character can attract short-break holiday activity, so they are emphasising these ‘sense of place’ differentiators to appeal to this niche market.

Specific promotions and products

- Some destinations are developing a specific image and brand for this market, for example ‘Brand Bendigo’ and Darwin and Alice Springs’ Come Share Our Story.
- Some destinations would like to see a stronger link with the No Leave, No Life campaign. One source suggested it would make sense to tie the dollar handouts of the stimulus packages to the campaign.
- Various styles of packaging have been developed, starting with the airline-accommodation packages and spreading to more comprehensive destination packages involving tours, attractions and restaurants.
- Regional destinations, in particular, mentioned the difficulties faced in developing new products and the frustration associated with development permits.
- More comprehensive websites are needed for destinations and individual businesses which provide detailed information and customer comments, along with a ‘call-to-action’.

Future strategies

- While the main source of the short-break holiday market remains domestic, several destinations which are ‘gateways’ to the nation could develop a more significant international component. The beginnings of such a business were already noted in Darwin, Perth, and Melbourne.
- Certain destinations need to strengthen their public transport systems if they are to appeal to the short-break market using LCC airlines.
- Destinations within ‘one tank of petrol’ from a major urban area feel they will continue to have short-break appeal, but will need to develop a critical mass of attractions and activities in order to ensure visits become short-stay rather than daytrips.
Short-Break Holidays—A Competitive Destination Strategy

- Isolated destinations will need to develop air connections and provide good local and regional access to such visitors.
- Packaging is seen as one way to integrate a destination’s offerings and differentiate it from competitors.
- All short-break destinations need to research this market segment and seek ways to differentiate themselves in a competitive market.

Summary of industry views

While the majority of those interviewed were enthusiastic and optimistic about the future of short-break holidays on Australia, there were some industry representatives who were less enthusiastic. These included representatives in destinations where there was a steady year-round demand for accommodation and associated sectors, as in Canberra and Perth, who felt the need to pursue such a niche market was not a high priority. Plus, it was difficult in certain areas to secure industry participation in this project which would indicate some regions and sectors are not particularly enthused by research or this particular market niche.

Construction of National Consumer Survey Instrument (Stage 2)

Based on the input from the literature review along with the focus group and industry interviews, several key areas were identified for the national consumer survey, undertaken in the second phase of the study. First, it is essential to identify those who are interested in short-break holidays and those who are not, to establish a feel for the size of this niche market. This was achieved by asking respondents to recall holidays spent over the past three years and weighting the survey sample against population estimates. Those who had undertaken a short-break holiday over that period were asked to provide the details on their last such holiday (Section A in Appendix D). Those who had not undertaken a short-break holiday over the same period were asked to respond to Section B of the national survey (Appendix D) regarding their reasons.

Regardless of how the respondents had spent their holiday time, their actual or potential motivation for a short-break holiday is examined in Section C, with particular interest on the type of travel motives, the appeal of particular places or activities, and the importance of visiting people. Within this section the respondents were asked to state their reasons for taking a short-break holiday and what would be their top choice destination within Australia. The actual decision-making process associated with short-break holidays is explored in Section D. This examines the differences in transport choices for short and long distance short-break holiday trips, and the general use of information sources and planning time for such holidays.

In recognition that short-break holidays are likely to be a moderate consumer commitment, it is important to assess which alternatives are competing with this type of purchase. This is examined in Section E by asking what the respondents did with their government stimulus package (www.treasurer.gov.au, accessed 13/02/2009), if they received one. In addition they are asked what key features they are looking for in a short-break destination and if some form of packaging would be of interest. Then they were asked questions regarding their awareness of advertising campaigns in general and of the government’s No Leave, No Life campaign in particular, which had received its first major public exposure a month or so ahead of the interview.

The final section of the telephone survey (Section F) asks questions relating to the respondent’s personal profile and household situation. These were asked in the same format as the National Visitor Survey (NVS), so that the previous responses could be cross-tabulated against some of the key characteristics of the population and be comparable with NVS data. A copy of the complete telephone survey questionnaire is enclosed in Appendix D.

The actual telephone survey was conducted by NWC Opinion Research of Melbourne, between August 13 and September 10, 2009. A total of 2,005 interviews were completed. These interviews were conducted using a Computer Assisted Telephone Interviewing (CATI) technique, similar to the regular NVS carried out by the same company. In this case the survey was restricted to persons 18 years or older, who were asked about their own short-break holiday trips and experiences. The average interview length was just under 18 minutes.

The survey sample was stratified geographically. Each state, apart from Tasmania and the two territories of the ACT and NT, was stratified into metro and regional areas, such as Sydney and the ‘Rest of NSW’, Melbourne and the ‘Rest of Victoria’, etc. Tasmania, the ACT and NT were each treated as one stratum. This resulted in 13 strata or areas overall. The number of interviews conducted in each area (or stratum) was determined such that each stratum’s share of the interviews was approximately equal to that stratum’s share of...
the total Australian population aged 18 years and over. Within each area households were selected randomly via Random Digit Dialling (RDD). For all the households so randomly selected, interviews were attempted with the person in that household aged 18 years or over who had the last birthday. That randomly selected individual then answered the survey in relation to his/her own short-break holiday experience.

To ensure representativeness, the final data was weighted using the ‘ABS Australian Population Estimates of all Adults aged 18 Years and Over’, which estimated the target population for Australia at 16.4 million (Australian Bureau of Statistics—Population by Age and Sex, Regions of Australia, 2008, cat. No. 3235.0 released August 11, 2009). For example, in the actual telephone survey the gender balance for the 2005 respondents was 840 males (41.9%) and 1165 females (58.1%). This survey distribution is skewed in favour of the females. When the weighting is applied it produces a gender ratio of 49.3% males and 50.7% females, which matches the ABS population estimates referenced above.

In the following results section each of the key questions has been analysed using cross-tabulation tables against selected demographic and socio-economic categories to provide a meaningful analysis of national consumer subgroups. The presented results are a tabular summary of the weighted telephone survey sample. A detailed description of this analysis is presented at the beginning of Chapter 5.
Chapter 4

CONFERENCE CONTRIBUTIONS

An important part of this project was regular contact with other academics and the industry regarding the study’s progress, so two conference appearances were included in the original proposal. One was the Council of Australian University Tourism and Hospitality Education’s (CAUTHE) annual academic conference in Fremantle in February 2009, the other was the Tourism Futures annual industry conference held in the Gold Coast in August 2009.

CAUTHE Conference Contributions

Several themes were identified by members of the research team who attended the CAUTHE conference, based on their reading and their preliminary focus group and industry interviews. In a Special Interest Group session arranged by the conference committee some of the research team and an interested outsider talked about their research observations to that point in time; and the following themes emerged:

1. The short-break focus groups were a heterogeneous group with many types of visitor, who have varying motives and behaviours. It was also a group that covers a wide range of demographic and socio-economic categories, but they had one thing in common—they were enthusiastic aficionados of short-break holidays.
2. In the focus groups we were talking with the ‘converted’, people who had considerable short-break experience and were keen to explore new places and try new things. To do this they made extensive use of the Internet, regardless of age and education differences, and reminded us of Oppermann’s (1993) call for a more contemporary emphasis on determining the national tourism resource base at a regional level and to identify current and potential markets for each region.
3. There were distinct differences in the motives and behaviours of those short-break visitors living in Australia’s capital cities compared to those living in regional centres. Those living in capital cities are more likely to use LCC airlines and to travel further away, sometimes to nearby international destinations; whereas those from regional centres were more likely to use the family car and go to domestic destinations such as the local capital city or an icon destination, generally the coast.
4. Despite the wide range of motives and activities, one major aspect of the short-break holiday was to combine it with a VFR or other personal matter. A significant number of short-break holidays were used to link up with friends and relatives, either as a travelling group or at the chosen destination; to visit with relatives and in many cases stay overnight with them, or to meet with a professional specialist (medical, educational or legal) in a capital city.

Tourism Futures Conference Contributions

The principal author of this report was permitted to make a presentation on the project and its progress to delegates at the Tourism Futures conference in one of its concurrent sessions. The audience was very receptive to the fact that such a study was underway and supportive of including both the demand and supply sides in our examination. Their response to the Stage 1 findings and the structure of the telephone survey involved the following points:

1. There was common agreement that destinations and individual businesses needed to know more about this niche market if they were to compete effectively.
2. It was agreed that this market was diverse and would make an ideal supplement to existing vacation styles and patterns.
3. It was noted that some destinations could make better use of their geographic locations to appeal to an international short-break market. The Gold Coast apparently has developed a substantial New Zealand market in partnership with LCC airlines.
4. If the economic downturn continued it was expected that more people would shorten their holidays (both time- and distance-wise) rather than do without entirely.
Chapter 5

RESULTS AND OBSERVATIONS FROM NATIONAL SURVEY

Introduction

The following tables present a tabular summary of the telephone survey weighted to the national population greater than 18 years of age. The order of the rows in each table indicates the relative importance of each option in the eyes of the sample, not the order in which they were presented to the respondents. The first column of each table is the key one, as it presents the weighting of the original responses with respect to Australia’s 16.4 million residents aged 18 years or older to the question and its percentage share. For example, in Table 3, 41.1% of the telephone survey respondents indicated they had undertaken a short-break holiday within the previous six months, which when weighted against the national population figures provides an estimate that 6.74 million Australians are likely to have done the same thing. Such national calculations can be made within each table. The remaining columns highlight significant demographic and socio-economic characteristics within the national profile which are strongly associated with the overall response. The significance tests of the cross-tab analyses are based on the unweighted sample sizes of the original sample, namely 2005 cases. These significant characteristics vary with each question, and have been selected based on their high degree of positive association with the national figures in the first column relating to each question (statistical significance of $p = 0.001$) and their relevance to future planning and marketing for the short-break market in Australia.

Short-break Holiday Experiences or Non-experiences

The first part of the long interview utilises the industry’s definition of a short-break holiday, namely ‘a trip of 1 to 4 nights away from home for leisure or holiday purposes here in Australia’. It attempts to establish an individual’s experience or non-experience with this type of holiday so that it is clear in their minds what is being discussed and how they have used or not used this option, before going onto the generic areas of motivation, decision-making and competitive forces.

Timing of last short-break holiday

The respondents were asked to recall their short-break holiday experiences over the past three years in order to set a realistic time period for their recall. In answer to when they last went on a short-break holiday in Australia, most of the actual survey respondents indicated they had gone on such a trip over the past year (54.9%), and 71.1% had taken at least one short-break holiday over the past three years. This would produce an anticipated 6.737 million Australians taking a short-break holiday over the previous six months, and 11.653 million taking one over the three year period. Only 7.3%, or an anticipated/weighted 1.205 million Australians, reported never taking such a trip (Table 3). This reveals there is a large national market for this type of vacation, even in difficult times like the ‘Global Financial Crisis’ (GFC). However, there are also a considerable number of residents who could be convinced to use short-breaks more regularly and for some to try it for the first time.
Table 3: Timing of Last Short-Break Holiday in Australia

<table>
<thead>
<tr>
<th>Last S-B Holiday</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within last 6 months</td>
<td>6.74 M (41.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Within 7 – 12 months</td>
<td>2.26 M (13.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to 2 years ago</td>
<td>1.80 M (11.0%)</td>
<td>25 – 34 (18.1%)</td>
<td>Three (13.9%)</td>
<td>$52 – 104K (12.4%)</td>
<td>Yes (12.7%)</td>
<td></td>
<td>Metro (11.8%)</td>
</tr>
<tr>
<td>Up to 3 years ago</td>
<td>0.86 M (5.2%)</td>
<td>25 – 34 (7.6%)</td>
<td>Four (6.0%)</td>
<td>$104K+ (13.1%)</td>
<td>Yes (6.8%)</td>
<td></td>
<td>Metro (5.8%)</td>
</tr>
<tr>
<td>More than 3 years ago</td>
<td>3.39 M (20.7%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>1.20 M (7.3%)</td>
<td>18 – 24 (10.3%)</td>
<td>Under $26K (10.4%)</td>
<td>No (7.9%)</td>
<td>No (8.8%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 3 shows all of the population’s selected demographic and socio-economic characteristics which are relevant statistically with one response or another. Where this occurs the characteristic and its percentage value have been noted in the table, as in the case of age and taking a short-break holiday within the past two years. This shows that 18.1% of the 25 – 34 age group took such a holiday which is significantly higher than the sample/population average of 11%. Where there is no highly significant association (at p = 0.001) the space has been left blank for reasons of clarity, as in the case of age and taking a short-break holiday ‘within the last six months’.

Certain demographic and socio-economic characteristics proved to be significantly related to the reported national pattern of short-break holidays. While none of the selected demographic or socio-economic variables showed any significant positive deviation from the national norms, in the case of holidays taken over the past 6 or 12 months, some significant differences did occur in terms of those who travelled between 1 – 3 years ago. Those travelling over the past two years had larger than normal representation from the younger age groups, household sizes of three and four, households with children under the age of 15, moderate and high household incomes. More of them had recreation leave entitlements and lived in metropolitan areas than the national average. Those travelling over the past three years had larger representation from the 25 – 34 age group, household sizes of four and five, with children under 15 years of age. Again more lived in metropolitan areas. Those in the ‘never’ category revealed strong links to the youngest and oldest age groups with low incomes and no recreation entitlements.

It would appear from these cross-tabs that short-break holidays have become more homogeneous in character over the recent past compared with 1 – 3 years ago, and their association with metropolitan based residents, recreation leave entitlement and families with moderate to high incomes may be weakening. However, it should be remembered that 2008–09 has been a tumultuous financial year and this could be a temporary situation. What may be more permanent is the existence of a non-participant group, which appears to consist of a significant number of young and old residents who are currently unable to take advantage of this form of vacation.

Frequency of short-break holidays

From the above data, the number of short-break holidays taken over the past three years by the respondents range from ‘one’ to ‘more than ten’; with the highest concentration (21.1%) occurring among those who reported 6 – 10 such trips (Table 4). The mean frequency is 6 due to the skewness effect of the two high categories, so the median (midway point) of four over the last 3 years is probably a better guide in this case. Only 2 demographic
and socio-economic characteristics showed a significant positive relationship to these patterns, and both occurred with those taking six to ten short-break holiday trips. This committed group has a significantly large number of 35 – 49 year olds, and reported a larger number in the top household income levels. So, regular domestic short-break holidays can be linked in particular to wealthy and middle aged adults.

Table 4: Number of Short-Break Holidays over Past Three Years

<table>
<thead>
<tr>
<th>No. of Short Break Holidays</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>1.64 M</td>
<td>35 – 49</td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(14.1%)</td>
<td></td>
<td>(27.5%)</td>
</tr>
<tr>
<td>Two</td>
<td>1.77 M</td>
<td></td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(15.2%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
<tr>
<td>Three</td>
<td>2.14 M</td>
<td></td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(18.3%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
<tr>
<td>Four</td>
<td>1.38 M</td>
<td></td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(11.8%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
<tr>
<td>Five</td>
<td>0.86 M</td>
<td></td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(7.4%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
<tr>
<td>Six to ten</td>
<td>2.46 M</td>
<td>35 – 49</td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(21.1%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
<tr>
<td>More than ten</td>
<td>1.38 M</td>
<td></td>
<td>$104K+</td>
</tr>
<tr>
<td></td>
<td>(11.9%)</td>
<td></td>
<td>(27.8%)</td>
</tr>
</tbody>
</table>

Number of nights away from home

The length of time away from home on these trips varies considerably, with the most popular category being 3 nights (Table 5). The smallest proportion (8.9%) is in the ‘one night’ category, which raises the question whether it should be included in the definition of a short-break holiday. The mean was 2.79 nights and the median was 3. There was only one variable which has a significant relationship to this distribution, and that was the strong link between the seniors (65 years plus) and those taking 4 nights away from home. This makes sense in that seniors are less likely to have work and other duties pressing for a quick return home.

Table 5: Number of Nights Away from Home with Last Short-Break Holiday

<table>
<thead>
<tr>
<th>Number of Nights</th>
<th>No. (Million)</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>1.04 M</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(8.9%)</td>
<td></td>
</tr>
<tr>
<td>Two</td>
<td>3.35 M</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(28.7%)</td>
<td></td>
</tr>
<tr>
<td>Three</td>
<td>4.25 M</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(36.4%)</td>
<td></td>
</tr>
<tr>
<td>Four</td>
<td>3.02 M</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(25.9%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>65+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(40.7%)</td>
<td></td>
</tr>
</tbody>
</table>

Staying in one destination

Respondents were asked if they ‘stay(ed) in the one destination for all their (declared) nights?’, to determine how mobile they are during their short-break holidays. The overwhelming ‘Yes’ response of 90.8% shows the vast majority are stationary rather than touring from place to place during these trips; although this does not discount some local touring or sightseeing from their accommodation base, or on the journey to and from the short-break destination. None of the selected socio-economic and demographic variables had a particularly strong association with this response pattern.
Main and combined purpose(s) of last short-break holiday

Enquiries about the purpose of the last short-break holiday were asked in terms of the ‘main’ purpose followed by two secondary reasons. The respondents were offered a wide range of options—18 options plus an ‘other’ category (Appendix D). These seem to cover the vast majority of reasons; since only 2.9% of the respondents came up with any ‘other’ answers in terms of their main purpose and just 3.7% when considering their secondary reasons.

Table 6 shows the seven most popular main reasons, some of which can be grouped together into a VFR or Sport segment. The most popular main reason by far is to undertake a break for leisure and relaxation (54.2%). The next most popular is a combined VFR market (29.5%), but in this case with a slight emphasis on relatives over friends. Sport would jump to fourth place if we combine participants with spectators, to produce a combined rating of 4.5%; entertainment in the form of events, performances or festivals is selected by 4.1% of the respondents and shopping is mentioned by 1.4% only.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holidays, (leisure and relaxation)</td>
<td>6.32 M (54.2%)</td>
<td>Four (64.9%)</td>
<td>$52K – 104K (61.1%)</td>
<td>Yes (62.2%)</td>
<td>Metro (59.7%)</td>
<td></td>
</tr>
<tr>
<td>Visiting relatives</td>
<td>1.97 M (16.9%)</td>
<td>65+ (27.0%)</td>
<td>One (26.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends</td>
<td>1.47 M (12.6%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment (events, performances, festivals)</td>
<td>0.48 M (4.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Regions (6.6%)</td>
</tr>
<tr>
<td>Sport (participation)</td>
<td>0.28 M (2.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sport (spectator)</td>
<td>0.25 M (2.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>0.16 M (1.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Within the leisure and relaxation purpose there are several significant positive associations. These involve households of four people and household income levels of $52,000 – $104,000. Most of these households have children under the age of 15 and reside mainly in metropolitan areas. In contrast, those visiting relatives are likely to include a significant number of seniors who live alone. Those who went on their last short-break holiday to be entertained, by events, performances or festivals, had a stronger link with low levels of household income and living in the regions than the norm.

The respondents were asked to provide two additional purposes for travelling on their last short-break holiday they offered an average of 1.58 purposes. The combined principal reasons for going on their last short-break holiday produced much the same distribution as with the ‘main’ purpose, except that shopping increases in importance (Table 7). The search for leisure and relaxation remained dominant, followed by visits with relatives and friends. Shopping rose from seventh to fourth place, above both sport purposes.
Table 7: Combined Purpose of Last Short-Break Holiday

<table>
<thead>
<tr>
<th>Purpose</th>
<th>No. * (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday (leisure, relaxation)</td>
<td>8.71 M (74.7%)</td>
<td></td>
<td></td>
<td>Metro (81.1%)</td>
</tr>
<tr>
<td>Visiting relatives</td>
<td>2.76 M (23.7%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends</td>
<td>2.75 M (23.6%)</td>
<td>18 – 24</td>
<td>Three (36.5%)</td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td>1.32 M (11.3%)</td>
<td></td>
<td></td>
<td>Regions (16.8%)</td>
</tr>
<tr>
<td>Shopping</td>
<td>0.66 M (5.7%)</td>
<td></td>
<td></td>
<td>Regions (9.2%)</td>
</tr>
<tr>
<td>Sport (participation)</td>
<td>0.51 M (4.4%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sport (spectator)</td>
<td>0.41 M (3.5%)</td>
<td></td>
<td></td>
<td>Regions (6.2%)</td>
</tr>
</tbody>
</table>

* Please note when the total exceeds 100% it signifies a multiple options question.

A number of significant variable associations are present within this distribution pattern. The ‘holiday’ purpose is very strong for metropolitan area residents, who seem to be keen on leisure breaks and getting away from the city, which confirms what the metropolitan focus groups told us. Visiting with friends is strongly linked to the youngest age group and a household size of three. People living in the regions are more strongly represented in the entertainment, shopping and sport spectatorship reasons for travel than the norm. This again confirms what we were told in the focus groups, where regional respondents often undertook a short-break visit to the state capital when they could combine a variety of purposes. The overall emphasis on relaxation confirms the literature’s prime motivation conclusion but less so in terms of the alternate active focal interest.

Mode of transport used on last short-break holiday

The principal mode of transport for short-break holidays by far is the private vehicle, normally the family car (Table 8). This was the mode of transport for 72.5% on their last short-break holiday. It was followed by air travel (19.5%) and then there was a considerable gap before the reporting of other forms of transport at 3.6% (rail) or lower.

Table 8: Mode of Transport on Last Short-Break Holiday

<table>
<thead>
<tr>
<th>Mode</th>
<th>No. * (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private vehicle</td>
<td>8.45 M (72.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air</td>
<td>2.27 M (19.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rail</td>
<td>0.42 M (3.6%)</td>
<td>18 – 24</td>
<td>One (10.3%)</td>
<td>$26K – 52K</td>
<td>No (5.4%)</td>
</tr>
<tr>
<td>Bus/Coach</td>
<td>0.21 M (1.8%)</td>
<td>65+</td>
<td>Less than $26K</td>
<td>No (2.9%)</td>
<td></td>
</tr>
<tr>
<td>Rented vehicle</td>
<td>0.12 M (1.0%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ship</td>
<td>0.98 M (0.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campervan,</td>
<td>0.37 M (0.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>motor home</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In general, there are few significantly related socio-economic and demographic variables associated with the choice of transport, indicating their widespread applicability to all levels of society. However, the exceptions are in the use of rail and bus/coach travel for short-break holidays. Rail travel is more strongly associated with young people, many of whom are living on their own and have a modest income of $26,000 – $52,000. They are also less likely to have recreation leave entitlements. Coach travel is more strongly associated with seniors who earn less than $26,000 a year, and have no leave entitlements. This would suggest that rail and coach companies have a more focused market than any of the other transport options.

**Main type of accommodation**

The sampled individuals used a wide range of accommodation types on their short-break holidays. Table 9 indicates the top nine selections from a range of 22 options, with the most popular being standard hotel or motel accommodation (28.0%), followed by staying with friends or relatives (21.7%). There are few strongly positive associations with these choices, but those which are significant make sense. There are a significantly large number of single people earning less than $26,000 per year choosing to stay with friends or relatives, which is probably the only way they could afford such a trip. Luxury accommodation in a hotel or resort is significantly related to households earning more than $104,000 per year; and serviced apartments, which are a self-catering option, offered special appeal to those with young children.

**Table 9: Main Type of Accommodation**

<table>
<thead>
<tr>
<th>Type</th>
<th>No. * (Million)</th>
<th>Household Size</th>
<th>Income</th>
<th>Children under 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard hotel/motel</td>
<td>3.27 M (28.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends or relatives</td>
<td>2.53 M (21.7%)</td>
<td>One (32.0%)</td>
<td>Less than 26K (37.2%)</td>
<td></td>
</tr>
<tr>
<td>Rented house or apartment</td>
<td>1.61 M (13.9%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxury hotel/resort</td>
<td>1.41 M (12.1%)</td>
<td>$104K+ (17.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serviced apartment</td>
<td>0.60 M (5.1%)</td>
<td></td>
<td></td>
<td>Yes (8.1%)</td>
</tr>
<tr>
<td>Own property</td>
<td>0.41 M (3.5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caravan park (cabin)</td>
<td>0.29 M (2.5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guest house/B &amp; B</td>
<td>0.29 M (2.5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camping (national park/Crown land)</td>
<td>0.24 M (2.1%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Side of road</td>
<td>0.18 M (1.6%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Leisure activities associated with short-break holidays**

Respondents were offered a wide range of leisure options (49 in total) from which to choose via a prompted open question, with these options placed in categories to help focus their recall via interviewer probes. The five categories are ‘Outdoor and Nature Activities’, ‘Sport or Active Activities’, ‘Arts, Heritage or Festival Activities’, ‘Local Attractions or Tourist Activities’, and ‘Anything Else, such as Social Activities’ (Appendix D). The top three responses in each category are reported in Table 10, with the five categories placed in descending order of popularity.

The leading leisure activities by far are the ‘Social Activities’, which were reported by 90.7% of the respondents (Table 10). Within that category the top three activities are ‘eating out’, going for a ‘walk or drive around’ their destination, and going ‘shopping for pleasure’ which includes casual window shopping. The second most popular category is ‘Outdoor or Nature Activities’ (51.8%), where ‘going to the beach’, ‘going bush walking’ and ‘visiting a national or state park’ are the top three choices. The third category is ‘Local Attractions
Short-Break Holidays—A Competitive Destination Strategy

and Tourist Activities’ (31.2%), with ‘going to markets’, ‘visiting wineries’ and ‘visiting wildlife parks, zoos or aquariums’ being the top three contenders. Fourth category is ‘Sport or Active Outdoor Activities’ (28.1%), where ‘fishing’, ‘playing other sports’ and ‘exercise’ are the top three choices. The fifth and last category, but still appealing to a fifth of the sample, is ‘Arts, Heritage or Festival Activities’ (22.4%). Here the most popular activities are ‘visiting museums or art galleries’, ‘visiting historic/heritage buildings, sites or monuments’ and ‘attending the theatre, concerts or other performing arts’. These results appear to confirm the ‘rest and relaxation’ emphasis of earlier studies and of our prior focus groups. Plus, they demonstrate a broad range of activities with a substantial degree of multiple activities.

Table 10: Major Leisure Activities

<table>
<thead>
<tr>
<th>Activities</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children under 15</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ‘Social’</td>
<td>10.57 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eat out</td>
<td>7.01 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walk or drive around</td>
<td>5.19 M</td>
<td>50 – 64</td>
<td></td>
<td>(51.9%)</td>
<td>No</td>
<td>(49.2%)</td>
</tr>
<tr>
<td>Go shopping (pleasure)</td>
<td>4.19 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. ‘Outdoor or nature’</td>
<td>6.04 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go to beach incl. swimming</td>
<td>3.76 M</td>
<td>35 – 49</td>
<td>Four</td>
<td>$52K – 104K</td>
<td>Yes</td>
<td>Metro (36.1%)</td>
</tr>
<tr>
<td>Go bush walking or on rainforest walks</td>
<td>2.27 M</td>
<td></td>
<td></td>
<td>(19.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit national parks/state forests</td>
<td>1.40 M</td>
<td></td>
<td></td>
<td>(12.0%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. ‘Local attractions and tourist activities’</td>
<td>3.63 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go to markets (street, weekend or arts and crafts)</td>
<td>1.50 M</td>
<td></td>
<td></td>
<td>(12.9%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit wineries</td>
<td>0.86 M</td>
<td>Two</td>
<td></td>
<td>(11.1%)</td>
<td></td>
<td>Metro (9.1%)</td>
</tr>
<tr>
<td>Visit wildlife parks/zoos/aquariums</td>
<td>0.74 M</td>
<td>Four</td>
<td></td>
<td>(11.1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. ‘Sport or active outdoor’</td>
<td>3.28 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go fishing</td>
<td>1.02 M</td>
<td></td>
<td></td>
<td>(8.7%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Play other sports</td>
<td>0.76 M</td>
<td></td>
<td></td>
<td>(6.6%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise (gym, swim)</td>
<td>0.62 M</td>
<td>35 – 49</td>
<td></td>
<td>(8.9%)</td>
<td>Yes</td>
<td>(8.4%)</td>
</tr>
<tr>
<td>5. ‘Arts, heritage or festival’</td>
<td>2.61 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>1.37 M</td>
<td>50 – 64</td>
<td></td>
<td>(18.1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit historic/heritage buildings, sites or monuments</td>
<td>0.75 M</td>
<td></td>
<td></td>
<td>(6.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attend theatre, concerts or other performing arts</td>
<td>0.57 M</td>
<td></td>
<td></td>
<td>(4.9%)</td>
<td></td>
<td>Regions (7.6%)</td>
</tr>
</tbody>
</table>
When the cross-tab analysis of these response patterns is examined only a few of the individual activities reveal any significant positive associations (Table 10). Among the most notable of these is ‘going to the beach’, which has strong links to metropolitan respondents with young children and incomes in the upper range. Those who choose to ‘walk or drive around’ have a higher likelihood of being older people with no young children. Those who ‘visit wineries’ has a strong association with metropolitan based couples. Many of the ‘exercise’ crowd seem to be fighting the middle age spread and still have young children. The regional interest in ‘theatre, concerts or other performing arts’ is once again confirmed in its strong association with those activities.

**Travel party structure**

Respondents were asked to describe the social links within their travel party on their last short-break holiday to develop a feel for the social interactions that are often part of short-break travel. Table 11 reveals the most common travel party is ‘adult couples’ representing 32.9% of the sample, followed by ‘family groups’ (26.6%), ‘travelling with friends or relatives without children’ (19.5%), and ‘travelling alone’ (12.3%). The other six choices produced responses of less than 10%. This indicates there are many different party structures associated with this type of holiday.

<table>
<thead>
<tr>
<th>Type</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult couple</td>
<td>3.83 M (32.9%)</td>
<td>50 – 64 (47.2%)</td>
<td>Two (55.1%)</td>
<td>$104K+ (40.5%)</td>
<td>No (40.7%)</td>
<td></td>
</tr>
<tr>
<td>Family group</td>
<td>3.10 M (26.6%)</td>
<td>35 – 49 (47.0%)</td>
<td>Four (49.8%)</td>
<td>$52 – 104K (32.7%)</td>
<td>Yes (58.1%)</td>
<td></td>
</tr>
<tr>
<td>Friends or relatives without children</td>
<td>2.28 M (19.5%)</td>
<td>18 – 24 (33.9%)</td>
<td>One (29.2%)</td>
<td>Less than $26K (28.1%)</td>
<td>No (25.5%)</td>
<td>Metro (22.7%)</td>
</tr>
<tr>
<td>Travelling alone</td>
<td>1.43 M (12.3%)</td>
<td></td>
<td>One (39.9%)</td>
<td></td>
<td>Yes (11.5%)</td>
<td></td>
</tr>
<tr>
<td>Friends/relatives travelling together with children</td>
<td>0.80 M (6.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sporting or community group (Non-school)</td>
<td>0.11 M (1.0%)</td>
<td>65+ (4.6%)</td>
<td>One (3.1%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Not surprisingly, there are a lot of demographic and socio-economic variables associated with these social travel party descriptors. The ‘adult couple’ category is strongly associated with the older age groups, where a household size of two and income levels exceeding $104,000 per year are common. In contrast the ‘family groups’ are bigger by definition, and are younger with many incomes in the $52,000 – $104,000 range. Travelling with friends or relatives without children is more the realm of young people based in metropolitan areas. Such characteristics should help short-break destinations and operators to target their market preferences more clearly.
Trip expenditure on last short-break holiday

Respondents were asked to estimate the total expenditure of their last short-break holiday, including travel, accommodation, food, drink, and general expenditure. The figures offered are likely to be just that—‘estimates’, and these in turn are likely to be less accurate the longer the gap between the interview and that last short-break holiday. So with reference to the Table 3 distribution relating to the timing of their last short-break holiday, caution should be applied to the following figures and interpretation.

Table 12 reveals a wide range of expenditure occurred with short-break holidays in Australia. Over 50% estimated they spent up to $500 on their short-break holiday, which with a median of 3 nights (Table 5) represents up to $166 per person-night. At the other end of the scale, 10.8% of respondents claimed to have spent in excess of $1,500, which would equate to $500 per person-night.

Table 12: Trip Expenditure

<table>
<thead>
<tr>
<th>Expenditure</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to $250</td>
<td>2.96 M (25.4%)</td>
<td>18 – 24 (46.1%)</td>
<td>One (35.2%)</td>
<td>Less than $26K (42.3%)</td>
<td>No (29.2%)</td>
<td>No (30.0%)</td>
</tr>
<tr>
<td>$251 – 500</td>
<td>3.10 M (26.6%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$501 – 750</td>
<td>1.35 M (11.6%)</td>
<td>35 – 49 (15.9%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$751 – 1,000</td>
<td>1.90 M (16.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1,001 – 1,500</td>
<td>0.98 M (8.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1,501 plus</td>
<td>1.26 M (10.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes (11.5%)</td>
</tr>
<tr>
<td>Refused/don’t know</td>
<td>0.11 M (1.0%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The significant demographic and socio-economic variables associated with this expenditure pattern all make sense. The big spenders are more likely to be associated with recreation leave entitlements and high incomes, while the low spenders are likely to have strong representation from the youngest age group, with the lowest level of reported income and no leave entitlements.

Non-Participants’ Holiday Behaviour

Holiday Experience over the Past Three Years

Twenty-eight percent of those surveyed said they had not been on a short-break holiday over the past three years (Table 3), so it is important to uncover the reasons for this situation. The first question in this section determined their general holidaying experience by asking those individuals if they had been on any type of holiday over the past three years. To this the response was 60% ‘Yes’ and 40% ‘No’. The only strong positive association with this response pattern from the selected demographic and socio-economic variables occurs with household income, where an annual income of less than $26,000 is significantly related to the ‘No’ response.

Alternative types of holiday experience

Not taking a short-break holiday over the past three years does not mean these individuals had not taken any form of holiday. In fact, 44.7% of them chose to take a regular annual holiday of 1 – 3 weeks duration, and 33.5% were prepared to go on longer holidays of more than three weeks. Twenty-four point one percent took intermediate trips of 5 – 6 days away and some (12.5%) even took a short-break holiday, but to an international destination. This would indicate that within the initial negative responses there is considerable room for domestic short-break trips in the future, since 60% of them had gone on some form of holiday over the three year period,
and some of their holiday types are very close to the domestic short-break description. There was no significant cross-tab association with the distribution of holiday types.

**Reasons for not taking a short-break holiday**

For the individuals who reported no short-break domestic holidays over the past three years, the reasons given were essentially a question of money and personal circumstances (Table 13). The top five answers given are led by ‘not enough money’ (23.7%) followed by a variety of personal reasons, and completed by ‘no interest’ (14.5%). This suggests that if ways can be found to get around these personal issues then many of these respondents would consider a short-break holiday.

<table>
<thead>
<tr>
<th>Reason</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not enough money</td>
<td>1.13 M (23.7%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Difficult to get away</td>
<td>1.10 M (23.1%)</td>
<td>35 – 49 (33.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not enough time</td>
<td>1.02 M (21.4%)</td>
<td></td>
<td>Four (37.8%)</td>
<td></td>
<td></td>
<td>Yes (31.2%)</td>
</tr>
<tr>
<td>Prefer longer holidays</td>
<td>0.69 M (14.5%)</td>
<td></td>
<td>One (26.9%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No interest</td>
<td>0.69 M (14.5%)</td>
<td>65+ (27.1%)</td>
<td></td>
<td></td>
<td>No (17.5%)</td>
<td></td>
</tr>
</tbody>
</table>

Even though the major issue seems to relate to a lack of money, none of the demographic and socio-economic variables has a significant relationship to this answer, not even in terms of their ‘household income’! This would suggest the feeling is perceptual rather than real, and that ‘enough’ is a relative concept across all income levels. Those who find it ‘difficult to get away’ are found particularly in the middle age group and are likely to be in mid-career with various work and family responsibilities; while those who claim ‘not enough time’ are linked to households of four people and are generally receiving recreation leave entitlements. Those with ‘no interest’ in short-break holidays are strongly linked to the seniors who are generally living on their own.

**Entitlement to recreation leave**

Given the government’s current campaign to encourage residents to use up some of their recreation leave on short-break holidays in Australia, it is helpful to determine how many individuals have this capacity. Almost a half (47.7%) said they were entitled to recreation leave over the past three years, representing an estimated 7.8 million adults aged 18 years or over (47.7%), while an estimated 8.5 million (52.1%) were not. The remaining 0.2% respondents were not sure (Table 14).
Those entitled are linked with the younger and middle-aged working segments, family-oriented households with young children, and the top income categories. They are strongly associated with a metropolitan location. Those not entitled to recreation leave over the past three years are linked strongly with the youngest and oldest age groups, which are on the margins of the employment years. They are often associated with single households, are unlikely to have young children and are concentrated in the lowest two income categories. These un-entitled individuals are more likely to be located in the regions, where independent small businesses predominate. Unlike those entitled, only 82.9% of the un-entitled individuals were sure of their status which suggests some confusion in the un-entitled ranks.

**Use of recreation leave apart from holidays**

Those respondents entitled to recreation leave (47.7%) revealed a wide range of alternative uses for their leave, apart from holidays. The suggestions mentioned by 5% or over of those entitled to such leave total are listed in Table 15. The foremost is to simply relax at home as 28.9% reported, followed by international travel (26.7%) in preference to domestic travel. Further back are working on home improvements (10.6%), looking after family members (9.5%), and saving up one’s leave (5.9%).

**Table 14:Entitlement for Recreation Leave**

<table>
<thead>
<tr>
<th>Entitled</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>7.82 M (47.7%)</td>
<td>25 – 34 (60.6%)</td>
<td>Three (57.4%)</td>
<td>$52K – 104K (58.2%)</td>
<td>Yes (55.1%)</td>
<td>Yes (100%)</td>
<td>Metro (50.9%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>35 – 49 (66.0%)</td>
<td>Four (57.4%)</td>
<td>$104K+ (73.2%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>8.55 M (52.1%)</td>
<td>18 – 24 (66.5%)</td>
<td>One (65.4%)</td>
<td>Less than $26K (87.1%)</td>
<td>No (55.6%)</td>
<td>No (82.9%)</td>
<td>Regions (57.7%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>65+ (93.9%)</td>
<td></td>
<td>$26K – 52K (66.9%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Multiple options question

Very few of the selected demographic and socio-economic variables registered significant associations with this usage pattern, and the two that did made sense. Firstly, those who choose to travel internationally are likely to be metropolitan based. This confirms the findings of the earlier focus groups, where metropolitan contributors with easy access to regular and LCC airlines included international short-breaks among their recent holiday memories, as did some in the country’s north. The northerners found some Asian destinations as tempting, if not more so, as far flung Australian options. Secondly, those individuals who are looking after family members during their recreation leaves are strongly linked to taking care of young children.
**Short-Break Holidays—A Competitive Destination Strategy**

**Awareness of short-break holiday promotional campaigns**

Given the desire to focus residents’ attention on the short-break holiday opportunities existing in Australia, the whole sample was asked about their awareness of any promotional campaigns encouraging this form of vacation. In response to this intentionally general ‘awareness’ question 54.1% said ‘Yes’, 44.9% said ‘No’, and a few were unsure (Table 16). Those who claim to be aware of such campaigns are strongly linked to the older age group of 50 – 64 years, have annual household incomes in excess of $104,000 and are entitled to recreation leave—in other words, a desirable segment. Those who claim to be unaware are more likely to be young and without recreation leave entitlements.

**Table 16: Awareness of Short-Break Holiday Campaigns**

<table>
<thead>
<tr>
<th>Aware</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Income</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>8.89 M (54.1%)</td>
<td>50 – 64 (61.0%)</td>
<td>$104K+ (61.3%)</td>
<td>Yes (62.8%)</td>
</tr>
<tr>
<td>No</td>
<td>7.37 M (44.9%)</td>
<td>18 – 24 (61.4%)</td>
<td></td>
<td>No (49.9%)</td>
</tr>
</tbody>
</table>

**Promotional campaign message**

When we probed more deeply into this top-of-mind awareness it became clear there is considerable confusion over what the campaigns are all about. Table 17 reports those answers provided by 5% or more of the total sample, and it reveals a considerable number remember the media outlet of the message rather than the actual message, while others could only repeat the general topic of this survey.

**Table 17: Promotional Campaign Message**

<table>
<thead>
<tr>
<th>Message</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print ads</td>
<td>1.46 M (16.4%)</td>
<td>65+ (24.3%)</td>
<td></td>
</tr>
<tr>
<td>Short-breaks</td>
<td>1.24 M (13.9%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheap deals</td>
<td>1.12 M (12.6%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV ads</td>
<td>0.95 M (10.7%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qld destinations</td>
<td>0.93 (10.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vic destinations</td>
<td>0.81 M (9.2%)</td>
<td>35 – 49 (14.0%)</td>
<td></td>
</tr>
<tr>
<td>Holiday in</td>
<td>0.59 M (6.7%)</td>
<td></td>
<td>Regions (10.5%)</td>
</tr>
<tr>
<td>Australia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NSW destinations</td>
<td>0.52 M (5.9%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The cross-tabs analysis reveals that seniors are strongly associated with the ‘print advertisements’ response, that it is the middle aged who seem to be strongly aware of the Victoria tourism marketing campaigns, and the regional respondents who are most aware of a ‘Holiday in Australia’ campaign. Overall this first and undirected enquiry into the consumers’ awareness of short-break holiday marketing campaigns has produced the common lack of specific definition in their recall.

**Short-Break Holiday Motivations**

In order to discover what appealed to everyone in the sample about short-break holidays, those who had undertaken a short-break holiday over the past three years and those who had not were presented a series of
questions on a variety of general motivational aspects. These questions included a focus on personal motivations, attractive destination features, and desired activities or attractions as part of a short-break holiday, offering respondents a wide range of options to which they could add their own ideas (Appendix D). As a result a variety of conceptual material is uncovered which can guide future marketing and planning. However, the section ends on a more pragmatic note, asking each individual to identify their top destination choice in Australia.

**Motivational factors**

When the total sample was asked which factors would motivate them to take a short-break holiday in Australia there was a range of chosen reasons (Table 18). The top choice by far is ‘getting away from it all’ (42.7%), followed by an associated desire to have a ‘change of scene’ (20.8%). This suggests the motivation of a break from routine dominates the desire for short-break holidays, as it does in Europe. However, the next most popular motive is to do ‘something new and exciting’ which again supports the literature in identifying a significant proportion (13.9%), who wish to be active on their short-break holidays. In addition some more specific motivations were identified, such as seeking a ‘change of weather’ (5.5%), ‘socialising with friends and relatives’ (1.0%), and attending a ‘specific event or attraction’ (0.7%).

<table>
<thead>
<tr>
<th>Factors</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting away from it all</td>
<td>7.01 M (42.7%)</td>
<td>25 – 34</td>
<td>Four (52.3%)</td>
<td>$52 – 104K</td>
<td>Yes (52.3%)</td>
<td>Yes (48.8%)</td>
</tr>
<tr>
<td></td>
<td>3.41 M (20.8%)</td>
<td>65+</td>
<td>One (28.2%)</td>
<td>$104K+</td>
<td>No (23.5%)</td>
<td>No (23.2%)</td>
</tr>
<tr>
<td>Change of scene</td>
<td>2.28 M (13.9%)</td>
<td>18 – 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Something new and exciting</td>
<td>1.32 M (8.1%)</td>
<td>25 – 34</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stress</td>
<td>0.91 M (5.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave/Rec. entitlement</td>
<td>0.82 M (5.0%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes (7.9%)</td>
</tr>
<tr>
<td>Socialising /visiting friends and relatives</td>
<td>0.17 M (1.0%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specific event or attraction</td>
<td>0.11 M (0.7%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The significant cross-tabs associated with this response reveal that ‘getting away’ is a particularly strong motivator for the young to middle aged who have young children. They are assisted in this regard by medium to high incomes and the presence of leave entitlements. Those citing a ‘change of pace’ are linked strongly with seniors living alone, who have no children under 15 and no entitlements. Reassuringly, the young are still strongly linked to seeking ‘something new and exciting’.

**Destination features**

Turning the respondents’ attention to what destination features would draw them to take a short-break holiday revealed the Australian’s love of ‘coastal attractions’ (28.6%) remained strong, but in terms of short-breaks the coast had some competitors such as ‘regional attractions’ (9.2%) and ‘mountain attractions’ (6.5%) (Table 19). In addition, some generic destination features are seen as desirable, such as having ‘plenty to do’ (18.2%) and ‘not (being) too touristy’ (10.9%). There is only one significant cross-tab relationship in these data, and that is a strong association between seniors visiting regional attractions and wishing to retain traditions and heritage.
Short-Break Holidays—A Competitive Destination Strategy

Table 19: Most Important Destination Features

<table>
<thead>
<tr>
<th>Factor</th>
<th>No (%)</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coastal attractions</td>
<td>4692</td>
<td>(28.6%)</td>
</tr>
<tr>
<td>Plenty to see and do</td>
<td>2982</td>
<td>(18.2%)</td>
</tr>
<tr>
<td>Not too touristy</td>
<td>1785</td>
<td>(10.9%)</td>
</tr>
<tr>
<td>Regional attractions</td>
<td>1505</td>
<td>(9.2%)</td>
</tr>
<tr>
<td>Good weather</td>
<td>1208</td>
<td>(7.4%)</td>
</tr>
<tr>
<td>Capital city attractions</td>
<td>1069</td>
<td>(6.5%)</td>
</tr>
<tr>
<td>Mountain attractions</td>
<td>1061</td>
<td>(6.5%)</td>
</tr>
<tr>
<td>Like the people in that location</td>
<td>1005</td>
<td>(6.1%)</td>
</tr>
<tr>
<td>To help retain traditions and heritage of older communities</td>
<td>441</td>
<td>(2.7%)</td>
</tr>
</tbody>
</table>

Appealing activities or attractions

A wide selection of potential activities and attractions were offered to the respondents and Table 20 reports on those responses with 5% or more support. The ‘most important short-break activity’ for this sample is highly varied, and reflects the wide range of motives discussed above. The major individual activity attraction is ‘festivals and events’ (18.3%) followed by the purchase of local crafts and products (13%) as shown in Table 20. These are followed by the more generic activities of eating and shopping, with specific groups of interest in museums (5.6%), wineries (5.6%) and nightlife (5.5%).

Table 20: Most Important Short-Break Activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Children Under 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festivals and events</td>
<td>3.01 M</td>
<td>50 – 64</td>
<td>No</td>
</tr>
<tr>
<td>Support local crafts and business</td>
<td>2.14 M</td>
<td>65+</td>
<td></td>
</tr>
<tr>
<td>Restaurants</td>
<td>1.88 M</td>
<td>50 – 64</td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>1.86 M</td>
<td>65+</td>
<td></td>
</tr>
<tr>
<td>Sport</td>
<td>1.46 M</td>
<td>18 – 24</td>
<td></td>
</tr>
<tr>
<td>Museums</td>
<td>0.92 M</td>
<td>65+</td>
<td></td>
</tr>
<tr>
<td>Wineries</td>
<td>0.92 M</td>
<td>18 – 24</td>
<td></td>
</tr>
<tr>
<td>Nightlife</td>
<td>0.89 M</td>
<td>65+</td>
<td></td>
</tr>
</tbody>
</table>

Only a few cross-tab relationships were of significant note. The ‘support for local crafts and businesses’ was strong with the 50 – 64 age group, ‘museums’ were particularly attractive to the seniors and ‘nightlife’ was particularly important to the young.

Additional literature- or industry-related motivational factors

Several motivational factors have been specifically noted in the literature or promoted by the tourism industry and some of these were presented in the survey under a general question relating to the actual choice of
destination in case some additional factors had been overlooked. Table 21 reveals the dominant one amongst those offered is to ‘visit friends and relatives’ (49.6%) followed by ‘learning about different cultures’ (26.2%). Different cultures were left open to respondent interpretation, and could mean a variety of things to different people, such as different ethnic groups or the difference between country and urban lifestyles. Then there was a big drop to ‘attending club events’ (3.8%)—which could be sport or nightlife related and others. One idea which has been prevalent among academics and the industry is that tourism could be one way to help Victoria’s fire ravaged regions to recover from ‘Black Saturday’, but these results show this sample did not rate that ideal very highly in terms of a short-break holiday. Maybe a daytrip to such regions is more appropriate in their eyes.

Table 21: Additional Factors When Deciding to Take a Short-Break Holiday

<table>
<thead>
<tr>
<th>Factor</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Income</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>8.14 M (49.6%)</td>
<td></td>
<td></td>
<td>Regions (57.7%)</td>
</tr>
<tr>
<td>Learn about different cultures</td>
<td>4.30 M (26.2%)</td>
<td></td>
<td>$52 – 104K (31.3%)</td>
<td>Metro (30.4%)</td>
</tr>
<tr>
<td>Attend club events</td>
<td>0.62 M (3.8%)</td>
<td>18 – 24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate support for hard-hit regions</td>
<td>0.54 M (3.3%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attend tournaments</td>
<td>0.47 M (2.9%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenery and location</td>
<td>0.42 M (2.6%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In terms of the two major responses, the VFR market seems to be particularly relevant for people living in the regions. The interest in learning about different cultures, which is particularly germane to the growing Indigenous tourism sector, shows particular promise among metropolitan residents in the middle income bracket. The young are particularly interested in attending club events.

**Most important motivational factor overall**

Having bombarded the respondents with a large variety of motivational questions and possible answers, the survey asked them to review their responses to the past few questions and identify in their own words their most important motivational factor. The response pattern for the top five motives is presented in Table 22. This shows the top one is ‘visiting friends and relatives’, identified by 26.8% of the sample, followed by ‘getting away from it all’ (21%). Then there was a gap before reaching a ‘change of scene’ (5.2%), ‘coastal attractions’ (4.3%) and ‘learn about different cultures’ (4.1%). This reveals a dual motivation for short-break holidays in Australia, consisting of a desire to relax and visit with friends and relatives.

Table 22: Most Important Motivational Factor

<table>
<thead>
<tr>
<th>Factors</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>4.40 M (26.8%)</td>
<td>65+ (35.8%)</td>
<td></td>
<td>Less than $26K (37.4%)</td>
<td>Yes (26.1%)</td>
<td>Regions (34.7%)</td>
</tr>
<tr>
<td>Getting away from it all</td>
<td>3.45 M (21.0%)</td>
<td>Four (28.8%)</td>
<td></td>
<td>$104K+ (28.3%)</td>
<td>Yes (26.1%)</td>
<td>Metro (23.8%)</td>
</tr>
<tr>
<td>Change of scene</td>
<td>0.85 M (5.2%)</td>
<td>65+ (8.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coastal attractions</td>
<td>0.70 M (4.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learn about different cultures</td>
<td>0.67 M (4.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The first two most important motivators not only had the largest proportional representation by far, but also the most significant associations. The VFR respondents are linked particularly with seniors from regional locations, who earn less than $26,000 per year. The VFR motivated respondents contrasted with those wishing to ‘get away from it all’, who are strongly represented among metropolitan households of four placed in the top income category, and who qualify for recreation leave entitlements.

**Most Important Consideration when Selecting a Short-Break Destination**

Since one of the project objectives is to suggest strategies for a more competitive destination strategy for the short-break market, the survey asked the respondents directly how they would rank various destination offerings. The top five first choices are presented in Table 23. It shows the clear majority consider ‘value for money’ (36.7%) as their most important consideration. Then there is a gap before arriving at ‘something different’ (16.9%), ‘something restful’ (15.8%) and ‘something for everyone in the travel group’ (13.5%). This is followed by another gap before ‘something active’ is identified by 7.1% of the sample.

<table>
<thead>
<tr>
<th>Consideration</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children under 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for money</td>
<td>6.01 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Something different</td>
<td>2.77 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Something restful</td>
<td>2.59 M</td>
<td></td>
<td></td>
<td></td>
<td>No (17.8%)</td>
</tr>
<tr>
<td>Something for everyone in the group</td>
<td>2.21 M</td>
<td>35 – 49</td>
<td>Four (24.3%)</td>
<td>$52K – 104K</td>
<td>Yes (23.2%)</td>
</tr>
<tr>
<td>Something active</td>
<td>1.17 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Most of the choices have no particularly significant cross-tabs, indicating that those responses have general support throughout the sample. However, those selecting ‘something for everyone in the travel group’ are particularly associated with middle age households containing children under 15, with from medium to high incomes.

**Top Destination Choices in Australia**

To finish this section the respondents were asked to rank their top short-break destination choices in Australia, as of 2009. They were asked for the first, second and third choices. Table 24 reports the top choices at state and regional levels.

Table 24 indicates that Queensland is the most popular first choice state destination, with 32.6% of the sample selecting it as such. There is a gap before NSW becomes the next first choice at 19.5%, followed by Victoria at 15.1%. There is a steady decline in appeal amongst the other states, culminating in the ACT at 1.2%. There are few significant associations with this distribution, apart from Queensland’s apparent appeal to individuals with children and earning middle to high incomes. In terms of regional choice, the coastal and country regions are favoured over the capital cities in a 60 – 40 split. This indicates that the short-break holiday market is valid for many destinations, and is one area where the smaller communities and destinations can compete with the metropolitan centres. There is only one significant relationship in terms of the regional distribution and this indicates regional destinations are particularly appealing to the middle age group.
### Table 24: First Choice Destination in Australia—State and Regions

<table>
<thead>
<tr>
<th>State</th>
<th>No. (Million)</th>
<th>Household Size</th>
<th>Income</th>
<th>Children under 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qld</td>
<td>5.34 M (32.6%)</td>
<td></td>
<td>$52K – 104K (38.2%)</td>
<td>Yes (39.0%)</td>
</tr>
<tr>
<td>NSW</td>
<td>3.20 M (19.5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vic</td>
<td>2.48 M (15.1%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WA</td>
<td>1.95 M (11.9%)</td>
<td></td>
<td></td>
<td>No (13.6%)</td>
</tr>
<tr>
<td>NT</td>
<td>1.12 M (6.8%)</td>
<td>One (11.1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasmania</td>
<td>0.87 M (5.3%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SA</td>
<td>0.82 M (5.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACT</td>
<td>0.19 M (1.2%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 24 (continued)

<table>
<thead>
<tr>
<th>Region</th>
<th>No. (Million)</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional</td>
<td>9.72 M (59.3%)</td>
<td>35 – 49 (65.4%)</td>
</tr>
<tr>
<td>Capital Cities</td>
<td>6.24 M (38.0%)</td>
<td></td>
</tr>
</tbody>
</table>

**Decision-Making Processes Involved with Short-Break Holidays**

It was considered that respondents may have different transport preferences when considering the distance involved with their potential short-break holiday destinations, so respondents were asked to state their preferred choice when considering a destination up to 400 kilometres away and then one over 400 kilometres away. The 400 kilometre divide was selected based on past literature findings and past NVS results, which indicated this was a general divide between close and far destinations.

**Transport choices for short distance short-break holidays**

When considering a short-break holiday to a close (up to 400 kms) destination the dominant mode of transport is the car (76.5%) as shown in Table 25. Far behind is to travel by air (13.4%) or by train (6.1%) and bus/coach (3.0%). Only a small proportion of those interviewed (1.0%) were unsure of their transportation choice under these conditions.
Table 25: Transport Choices for Short-Break Holidays of up to 400 kilometres

<table>
<thead>
<tr>
<th>Transport Mode</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>12.55 M (76.5%)</td>
<td>35 – 49 (84.1%)</td>
<td></td>
<td>$104K+ (83.7%)</td>
<td>Yes (81.7%)</td>
<td>Yes (81.7%)</td>
</tr>
<tr>
<td>Airplane</td>
<td>2.20 M (13.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td>0.99 M (6.1%) (65+) (14.6%)</td>
<td>One (15.5%)</td>
<td>Less than $26K (14.9%)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus/Coach</td>
<td>0.49 M (3.0%)</td>
<td>65+ (10.2%)</td>
<td>One (8.1%)</td>
<td>Less than $26K (10.2%)</td>
<td>No (4.1%)</td>
<td>No (4.1%)</td>
</tr>
<tr>
<td>Not sure</td>
<td>0.17 M (1.0%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

When the cross-tab analysis is conducted some distinctive relationships emerge. Car travel appears to be particularly favoured by the middle aged, with children under 15 and recreation leave entitlements, who earn a household income of over $104,000 per year. Train and bus selection, on the other hand, is used more by the seniors who earn less than $26,000 a year, have no recreation leave entitlements and often live on their own. Air travel in contrast has a broad appeal, with no particular demographic or socio-economic variables to distinguish its choice.

Transport choices for long distance short-break holidays

When the respondents were asked to consider short-break holiday trips of over 400 kilometres, the relative attraction of air transport rises to top spot (Table 26). Air travel was selected by 60.2% of the respondents, and car travel fell to a distant second place with 28.4% of the selection. Train retains its third position with 6.1% but bus/coach drop to a smaller 1.6% as fourth choice. Not surprisingly, there was more uncertainty about which mode to select with this increase in distance consideration, but it was still a small proportion at 3.6%.

Table 26: Transport Choices for Short-Break Holidays of over 400 kilometres

<table>
<thead>
<tr>
<th>Transport Mode</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airplane</td>
<td>9.88 M (60.2%)</td>
<td></td>
<td></td>
<td></td>
<td>Yes (66.3%)</td>
<td>Metro (65.3%)</td>
<td></td>
</tr>
<tr>
<td>Car</td>
<td>4.66 M (28.4%)</td>
<td>65+ (13.8%)</td>
<td>One (12.0%)</td>
<td>Less than $26K (13.8%)</td>
<td>No (7.7%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td>0.99 M (6.1%)</td>
<td>65+ (10.2%)</td>
<td>One (8.1%)</td>
<td>Less than $26K (10.2%)</td>
<td>No (4.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus/Coach</td>
<td>0.28 M (1.7%)</td>
<td>65+ (6.4%)</td>
<td>One (5.5%)</td>
<td>Less than $26K (6.1%)</td>
<td>No (2.6%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not sure</td>
<td>0.59 M (3.6%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are positive associations linked with each choice. In the case of air travel there is a strong link to those who have recreation leave entitlements and live in metropolitan areas. This latter point confirms the findings of the focus groups, where we detected a much stronger use of LCCs among the metropolitan participants than among those from the regions. Likewise, the stronger appeal of the car to regional travellers confirms their relative isolation from many of the current LCC airports, and those with young children would find car travel competes favourably with air travel in terms of comfort and cost. Once again the train and bus alternatives are particularly appealing to the seniors with low incomes and no paid recreation leave entitlements.

Advanced arrangements and bookings at short-break destinations

When the respondents select a potential short-break destination many of them do make prior arrangements or bookings. The two terms ‘arrangements’ and ‘bookings’ were used to cover both non-commercial and
commercial enterprises, so in the case of accommodation this can include confirming a visit with a friend or relative as well as a booking with a hotel or motel. The most popular area for such arrangements and bookings is in terms of accommodation (87.3%), followed by car hire, festivals and events and accommodation transfers (from and to the local airport) with around 25% each, and the remainder are under 20% (Table 27). Interestingly, 5.5% claimed they would arrange or book ‘nothing in advance’, this must make them popular with both friends and hotel keepers!

Table 27: Advance Arrangements/Bookings at Destination

<table>
<thead>
<tr>
<th>Services</th>
<th>No.* (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accom.</td>
<td>14.31 M (87.3%)</td>
<td>Four (94.2%)</td>
<td>$52 – 104K (92.6%)</td>
<td>Yes (92.4%)</td>
<td>Yes (90.9%)</td>
<td></td>
</tr>
<tr>
<td>Car-hire</td>
<td>4.86 M (29.6%)</td>
<td>50 – 64 (35.5%)</td>
<td>$52 – 104K (35.3%)</td>
<td>Yes (35.7%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festivals/ events</td>
<td>4.03 M (24.6%)</td>
<td></td>
<td></td>
<td></td>
<td>Yes (35.7%)</td>
<td></td>
</tr>
<tr>
<td>Transfers to accom.</td>
<td>4.00 M (24.4%)</td>
<td></td>
<td></td>
<td></td>
<td>Yes (35.7%)</td>
<td></td>
</tr>
<tr>
<td>Tours</td>
<td>2.82 M (17.2%)</td>
<td>65+ (25.9%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attractions</td>
<td>2.74 M (16.7%)</td>
<td>25 – 34 (24.2%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurants</td>
<td>1.85 M (11.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nothing in advance</td>
<td>0.90 M (5.5%)</td>
<td>65+ (12.8%)</td>
<td>Two (7.8%)</td>
<td>Less than $26K (11.4%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Multiple options question

The cross-tabs analysis reveals accommodation arrangements or bookings are particularly relevant to family-oriented households with young children and mid-high incomes and recreation leave entitlements. Local car-hire is particularly associated with older people with mid-high income levels. Local tour arrangements/bookings are strongly linked to seniors, and attractions arrangements/bookings to the young adults. Those who would arrange or book ‘nothing in advance’ have a strong link to seniors living in two person households with an income of less than $26,000, so they are not necessarily the adventurous youth who are frequently associated with a casual approach to travel. This could be because many in the seniors category are visiting with friends and relatives and/or have more time on their hands so can be more casual in their approach.

Preferred approach to booking for short-break holidays

If someone was going to make a booking in association with a short-break holiday they would use a variety of channels, but the main one is the Internet (54.6%) as shown in Table 28. This is followed by use of the phone for direct bookings, and visits to a travel agent. This time only a small portion (0.7%) said they would not use anyone or service to make a booking.
Table 28: Preferred Way to Make Bookings

<table>
<thead>
<tr>
<th>Preference</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Internet</td>
<td>8.96 M (54.6%)</td>
<td>25 – 34 (65.4%)</td>
<td>Four (68.9%)</td>
<td>$52K – 104K (61.9%)</td>
<td>Yes (61.7%)</td>
<td>Yes (68.3%)</td>
<td>Metro (58.7%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>35 – 49 (61.5%)</td>
<td></td>
<td>$104K+ (72.8%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By phone</td>
<td>4.86 M (29.6%)</td>
<td>65+ (38.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Regions (35.6%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In person at travel agent</td>
<td>1.82 M (11.1%)</td>
<td>65+ (22.7%)</td>
<td>One (19.5%)</td>
<td>Less than $26K</td>
<td>No (12.8%)</td>
<td>No (14.3%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(26.3%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Through a friend</td>
<td>0.41 M (2.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t book</td>
<td>0.11 M (0.7%)</td>
<td>65+ (2.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By post</td>
<td>0.058 M (0.4%)</td>
<td>More than Five (3.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Those who would be particularly prone to book using the Internet are the family households placed in the two highest income bands and living in metropolitan areas. Those using the direct route via the phone are strongly linked with seniors who live in the regions, and seniors are likely to be strong users of travel agent services and are linked with the few ‘won’t book’ types. This would appear to confirm that Internet usage is a generational thing and is likely to grow in importance as upcoming generations gain control over their own travel decisions. However, it should be noted that in the focus groups, which attracted the short-break aficionados, those seniors present made great use of the Internet for their short-break holiday bookings, including the payments for a guaranteed booking.

Information sources for short-break holidays

When the telephone survey respondents sought specific information regarding their short-break holiday options, they turned to the Internet (Table 29). Respondents used an average of two sources of information (1.97) for their short-break holidays and we know from the focus groups there is much searching and many comparisons made in the process. Use of the Internet is cited by 67.7% of the sample, and dominates the total list of 16 options that were offered in the survey. The next largest source is ‘friends’ (24.2%), followed by ‘advertising’ (19.8%), ‘travel agents’ (16.1%) and relatives (16.1%). Interestingly, only 8.4% cited a ‘previous visit’ as a source, which suggests that either previous experience is not such a great influencer as academic models suggest or that the majority of short-break holiday-makers preferred to visit different destinations on each trip.
Table 29: Information Sources for Short-Break Holidays

<table>
<thead>
<tr>
<th>Information Source</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
<th>Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>11.11 M</td>
<td>18 – 24 (80.7%)</td>
<td>Four (83.1%)</td>
<td>$52K – 104K (78.5%)</td>
<td>Yes (81.8%)</td>
<td>Yes (81.7%)</td>
<td>Metro (70.4%)</td>
</tr>
<tr>
<td></td>
<td>(67.7%)</td>
<td>25 – 34 (87.0%)</td>
<td>(83.1%)</td>
<td>$104K+ (85.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>35 – 49 (77.7%)</td>
<td>(83.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends</td>
<td>3.97 M</td>
<td>18 – 24 (80.7%)</td>
<td>Four (83.1%)</td>
<td>$52K – 104K (78.5%)</td>
<td>Yes (81.8%)</td>
<td>Yes (81.7%)</td>
<td>Metro (70.4%)</td>
</tr>
<tr>
<td></td>
<td>(24.2%)</td>
<td>25 – 34 (87.0%)</td>
<td>(83.1%)</td>
<td>$104K+ (85.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>35 – 49 (77.7%)</td>
<td>(83.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising</td>
<td>3.25 M</td>
<td>50 – 64 (27.4%)</td>
<td>One (23.2%)</td>
<td>Less than $26K (23.1%)</td>
<td>No (18.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>travel articles or documentaries</td>
<td>(19.8%)</td>
<td></td>
<td>(23.2%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel agent</td>
<td>2.64 M</td>
<td>65+ (28.9%)</td>
<td>One (23.2%)</td>
<td>Less than $26K (23.1%)</td>
<td>No (18.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(16.1%)</td>
<td></td>
<td>(23.2%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relatives</td>
<td>2.64 M</td>
<td></td>
<td>One (23.2%)</td>
<td>Less than $26K (23.1%)</td>
<td>No (18.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(16.1%)</td>
<td></td>
<td>(23.2%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel book, guide or brochure</td>
<td>2.57 M</td>
<td></td>
<td>One (22.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(15.6%)</td>
<td></td>
<td>(22.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist office or VIC</td>
<td>1.40 M</td>
<td>65+ (14.7%)</td>
<td>No (10.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(8.6%)</td>
<td></td>
<td>(14.7%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous visit</td>
<td>1.37 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(8.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motoring association</td>
<td>0.86 M</td>
<td>65+ (10.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(5.2%)</td>
<td></td>
<td>(10.8%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Multiple options question

Those who used the Internet as an information source are strongly linked to the three youngest age categories and the two highest income categories of the survey, which would make them highly desirable target markets. Furthermore they are mainly living in metropolitan areas, which make them more accessible to supplementary material or follow-up procedures. The seniors seem to be more comfortable with the face-to-face or one-to-one service they can expect at travel agencies, tourist offices or motoring associations.

**Length of planning for short-break holidays**

The telephone survey offered a range of planning periods to the respondents, and the majority selected ‘within 3 months’ (28.7%), closely followed by ‘within 1 month’ (25.0%); thus indicating a medium to short length of pre-planning for short-break holidays. Thereafter, the planning periods fell away dramatically. At the short end of the planning spectrum 8.8% of the respondents claimed ‘within a week’, 8.9% ‘within two weeks’, and 6.3% ‘within three weeks’. At the long end, 12.5% cited ‘within six months’, 4.3% ‘within one year’, and 1.7% ‘over a year’. Only one group recorded a significant demographic or socio-economic relationship, and this is a strong positive association between those planning their trip ‘within six months’ and households with young children. This suggests some longer than usual preparation is required when young children are involved.

**Competition for Short-Break Holidays**

This section was placed in the telephone survey to test the widespread notion that short-break holidays, being a relative newcomer to the leisure market and costing relatively less than the traditional annual holiday of two weeks or more, are likely to experience excessive competition for the necessary time and cash resources of an
Short-Break Holidays—A Competitive Destination Strategy

individual or household. Furthermore, this element of competition was introduced with reference to the ongoing national campaign of No Leave, No Life to determine what impact this promotional campaign for short-break holidays is beginning to have during its early stages.

Eligible for federal financial stimulus program

Table 30 shows that within our sample 62.5% received some form of federal government stimulus payment. This stimulus was offered from late 2008 onwards to those lower and middle income individuals who submitted income tax payments in 2007–08; and its impact was felt by the economy over the following year. There was a small number and percentage who either did not know if they were recipients or refused to answer this financial question.

<table>
<thead>
<tr>
<th>Situation</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Income</th>
<th>Children Under 15</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>10.25 M</td>
<td>25 – 34</td>
<td>$52K – 104K</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>(62.5%)</td>
<td>(72.4%)</td>
<td>(74.0%)</td>
<td>(70.0%)</td>
<td>(79.8%)</td>
</tr>
<tr>
<td>No</td>
<td>5.83 M</td>
<td>18 – 24</td>
<td>Less than $26K</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>(35.5%)</td>
<td>(51.5%)</td>
<td>(51.7%)</td>
<td>(39.2%)</td>
<td>(45.8%)</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0.24 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(1.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refused to say</td>
<td>0.09 M</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(0.5%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

When the distribution of yes or no answers was compared with the sample’s selected demographic and socio-economic characteristics some statistically significant patterns began to emerge. For example, across the five age categories the two working middle age groups had significantly greater representation in the ‘Yes’ category than the national norm of 62.5%; while the two extreme groups, the young and seniors, had significantly greater representation than the national norm when it came to the ‘No’ response. This makes sense given that to receive this stimulus award you had to be a taxpayer in the year previous to the GFC, and a good number of young people and seniors would have failed to qualify. Looking at those who did receive such a stimulus, there was significant number amongst those households with an annual income of $52,000 – $104,000, with children under the age of 15 years, and who were entitled to some recreation leave.

Use of most of the stimulus payment

Table 31 reveals how those in this sample who received the stimulus used most of their stimulus dollars. It shows the greatest use was to pay off existing mortgage or other personal debts (25.1%), followed by saving or investing (20.5%) or putting it towards some household improvement (11.6%). Its use for holiday purposes came some way down the ladder of priorities, with 6.7% of the respondents using it for ‘long or major holidays’ and only 3.9% for short-break holidays. When it came to the cross-tabs analysis, the sample stayed pretty close to the national norms in their response pattern except in one case. There were a significant number of those who saved or invested their stimulus package who are ineligible for recreation leave. On the face of it, it makes sense for individuals and households to focus on saving and investing if they do not have provision for a formal leave program.
Table 31: Use of Government Stimulus Payment

<table>
<thead>
<tr>
<th>Use Sole or Major</th>
<th>No. (%)</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pay off mortgage or other debts</td>
<td>2567 (25.1%)</td>
<td></td>
</tr>
<tr>
<td>2. Save/invest</td>
<td>2097 (20.5%)</td>
<td>No (24.4%)</td>
</tr>
<tr>
<td>3. Put towards home improvements</td>
<td>1184 (11.6%)</td>
<td></td>
</tr>
<tr>
<td>4. Put towards long holiday</td>
<td>683 (6.7%)</td>
<td></td>
</tr>
<tr>
<td>5. Put towards home entertainment</td>
<td>573 (5.6%)</td>
<td></td>
</tr>
<tr>
<td>6. Spent on day-to-day living expenses</td>
<td>398 (3.9%)</td>
<td></td>
</tr>
<tr>
<td>7. Put towards a car</td>
<td>397 (3.9%)</td>
<td></td>
</tr>
<tr>
<td>8. Put towards a short break Holiday</td>
<td>395 (3.9%)</td>
<td></td>
</tr>
</tbody>
</table>

Three Most Important Short-Break Destination Features

As the short-break holiday market grows, present and potential destinations will face increased competition for this attractive market segment, and it becomes important to know what particular destination features will attract this specific market segment. Accordingly, the telephone survey asked respondents to indicate what is the most important feature they are seeking in a short-break destination, followed by up to another two features to arrive at their top three features.

The survey offered eleven choices and Table 32 reveals the most important eight features. The most desirable feature for 27.1% of the sample is the existence of a ‘range of attractions and activities’. This means they want an adequate range of things to see and do over their short-break of a 1 – 4 night stay, a range that is likely to appeal to the variety of tastes incorporated in their travel party. Close behind comes the 25.8% who seek the ‘presence of friends or relatives’ in the destination where they can visit during the short-break. Then there is a fall to less than 10% in each case, who identify ‘4 – 5 star accommodation’, ‘easy access’ and ‘festivals and events’ as their most important desirable feature.

Those who ask for a range of attractions and activities are strongly associated with middle-aged adults in household sizes of four, which suggests the possible presence of demanding teenagers. In contrast, festivals and events along with nightlife appeal particularly to the youngest age group; while the presence of friends and family is strongly linked to the seniors.
### Table 32: The Most Important Destination Feature for a Short-Break Holiday

<table>
<thead>
<tr>
<th>Feature</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range of attractions and activities</td>
<td>4.45 M (27.1%)</td>
<td>25 – 34</td>
<td>Four (34.9%)</td>
</tr>
<tr>
<td>Presence of friends, relatives</td>
<td>4.23 M (25.8%)</td>
<td>65+</td>
<td></td>
</tr>
<tr>
<td>4 – 5 Star accommodation</td>
<td>1.54 M (9.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy access by car or air</td>
<td>1.25 M (7.6%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festivals and events</td>
<td>1.16 M (7.1%)</td>
<td>18 – 24</td>
<td></td>
</tr>
<tr>
<td>Various travel packages</td>
<td>0.80 M (4.9%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good restaurants</td>
<td>0.69 M (4.2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nightlife</td>
<td>0.53 M (3.2%)</td>
<td>18 – 24</td>
<td></td>
</tr>
</tbody>
</table>

When all the desirable features (multiple responses) are combined in Table 33 it shows the distribution of these features did not change the top two features from the previous table, with ‘range of attractions and activities’ rising to 58.1% and ‘presence of friends and relatives’ to 51.1%. However, ‘easy access’ (30.3%), ‘good restaurants’ (26.3%) and ‘festivals and events’ (24.6%) experienced significant mention increases this time, which signifies their important role in fleshing out the desirability of a short-break destination.

### Table 33: The Top Three Destination Features for a Short-Break Holiday

<table>
<thead>
<tr>
<th>Feature</th>
<th>No.* (Million)</th>
<th>Age</th>
<th>Children Under 15</th>
<th>Household Income</th>
<th>Rec. Leave Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range of attractions and activities</td>
<td>9.53 M (58.1%)</td>
<td>35 – 49</td>
<td>Yes (65.0%)</td>
<td>$104K+ (31.6%)</td>
<td>Yes</td>
</tr>
<tr>
<td>Presence of friends and relatives</td>
<td>8.39 M (51.1%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy access by car or air</td>
<td>4.97 M (30.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 – 5 star accommodation</td>
<td>4.34 M (26.4%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good restaurants</td>
<td>4.31 M (26.3%)</td>
<td></td>
<td></td>
<td>$104K+ (34.4%)</td>
<td></td>
</tr>
<tr>
<td>Festivals and events</td>
<td>4.04 M (24.6%)</td>
<td>18 – 24</td>
<td>(44.8%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Various travel packages</td>
<td>1.92 M (11.7%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nightlife</td>
<td>1.83 M (11.2%)</td>
<td>18 – 24</td>
<td>(43.2%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>World class attractions</td>
<td>1.69 M (10.3%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Multiple options question

The significant positive associations in the cross-tabs analysis confirm common expectations. The appeal of a ‘range of attractions and activities’ at a destination is particularly strong for those middle-aged respondents with young children. The particular interest in ‘good restaurants’ is strongly supported by those with the highest...
income and access to recreation leave entitlements. ‘Festivals and events’ are strongly associated with the youngest age group, as is the interest in ‘nightlife’.

In Tables 32 and 33 we included a ‘various travel packages’ option because some industry interviewees and focus group respondents had indicated this might make short-break holidays more competitive, especially if it could simplify the selection process and provide some cost savings. However, in these two open questions it came in as the sixth priority for the most important feature (Table 32) and the seventh within the top three features (Table 33). To examine its competitive possibilities further we followed up these two general questions with a specific enquiry as to the public’s interest in such a marketing and management strategy.

**Interest in Australian Short-Break Holiday Packages**

The telephone survey respondents were asked to rank their interest in possible combined sector sharing packages (transport, accommodation, attractions, etc.), and provided a rather nebulous result (Table 34). There is a general interest, with 41.1% indicating a positive interest, 30.6% somewhat interested and 27.7% uninterested. It will obviously require more research, development and marketing if it is to fulfil the potential raised by certain members of the industry and public in our earlier meetings. Those who clearly rejected the idea were strongly associated with seniors who lived in the regions with annual incomes of less than $26,000. These short-break holiday-makers are largely visiting with friends and relatives according to earlier analysis results, so understandably would not find much or any advantage from commercially generated tourism packages.

<table>
<thead>
<tr>
<th>Level of Interest</th>
<th>No. (Million)</th>
<th>Age</th>
<th>Household Income</th>
<th>Residential Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very interested</td>
<td>2.37 M (14.5%)</td>
<td>65+</td>
<td>Less than $26K</td>
<td>Regions (14.0%)</td>
</tr>
<tr>
<td>Interested</td>
<td>4.37 M (26.6%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Somewhat interested</td>
<td>5.02 M (30.6%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not interested</td>
<td>2.78 M (17.0%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not at all interested</td>
<td>1.76 M (10.7%)</td>
<td>65+</td>
<td>Less than $26K</td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td>0.11 M (0.6%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Promotional Short-Break Holiday Campaign Awareness**

With the growth of short-break holidays in Australia more states and destinations have been focusing on this segment and various television and radio programs along with the travel sections of weekend papers have been used to advertise their products. Consequently, we felt it important to see if these messages are getting through to a public which is swamped with competing messages and inducements for the consumer dollar.

First, we asked if the respondent could recall any ‘particular advertising campaign, promotion or program that has influenced (their) choice of destination for either a short-break or long-break holiday in Australia’. In response 33.2% of the respondents said they could recall such a thing, and 66.8% said they could not. For those who claimed to remember such a campaign, promotion or program, we asked for details. These respondents mentioned 25 different sources in relation to this intentionally general open question and the top ten are identified in Table 35.

Table 35 shows the most memorable information source is the television program ‘Getaway’, which was cited by 24.1% of those who qualified for this question. This is followed by ‘other TV shows’ (19.5%), then by the first of several state campaigns in ‘Queensland destinations’ (9.7%), declining steadily to the ‘Internet’ (4.6%) at number 10. The table reveals the wide range of sources used by consumers for any of their holiday destination choices and the dominant position of television marketing with its visual impact and personal presentations. It shows three states have started to carve out recognisable niches for the domestic Australian tourism market and that airlines are becoming more important partners in this process.
Table 35: Principal Information Sources for an Australian Holiday

<table>
<thead>
<tr>
<th>Sources</th>
<th>No. (Million)</th>
<th>Household Size</th>
<th>Children Under 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Getaway TV show</td>
<td>1.31 M (24.1%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Other TV shows</td>
<td>1.06 M (19.5%)</td>
<td></td>
<td>No (23.2%)</td>
</tr>
<tr>
<td>3. QLD destinations</td>
<td>0.53 M (9.7%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Newspapers</td>
<td>0.51 M (9.3%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Other print media</td>
<td>0.47 M (8.6%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. VIC destinations</td>
<td>0.41 M (7.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Airline ads</td>
<td>0.32 M (5.8%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. NSW destinations</td>
<td>0.29 M (5.4%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Direct mail</td>
<td>0.28 M (5.1%)</td>
<td>Five (14.6%)</td>
<td></td>
</tr>
<tr>
<td>10. Internet</td>
<td>0.25 M (4.6%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Interestingly, there is either some confusion in the minds of consumers about the domestic focus of the question or an unplanned domestic impact from some of our past international campaigns. A few respondents listed some of our famous and infamous lures for international visitors, such as ‘Where the bloody hell are you?’ (0.9%), the ‘Australia’ movie (0.7%) and the ‘Paul Hogan campaign’ (0.3%) as being memorable sources for a holiday in Australia. The closest the survey respondents came to identifying with the current No Leave, No Life campaign in Table 35 was 13th place and thus not included in the table, with only 2.4% of the sample identifying the ‘short-breaks’ campaign.

When respondents were asked specifically whether they had ‘heard or seen the Australian government’s recent No Leave, No Life campaign the figure rose to 9.6%, which left 89.7% saying ‘No’, and 0.7% claiming ‘Don’t Know’. There were no strongly significant cross-tab relationships within this distribution, so one cannot infer any specific links to the response pattern.

For those who claimed to have heard or seen the No Leave, No Life campaign there was a range of interpretations (Table 36). In answer to the probing question regarding the ‘key message behind this campaign’ the sample provided ten responses. The dominant interpretation is ‘to take a break and enjoy time-off from work’ (41.4%), followed by ‘encourage people to use their leave entitlements’ (17.5%) and to ‘balance work and leisure’ (15.3%) to complete the top three. It would appear, therefore, that the principal message of striking a balance between work and relaxation by using one’s recreation leave entitlement is beginning to come through. There were no statistically significant cross-tab relationships, so it would appear these are across-the-board responses.
Table 36: Key Message Behind *No Leave, No Life* Campaign

<table>
<thead>
<tr>
<th>Message</th>
<th>No.* (Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take breaks, enjoy time off</td>
<td>0.65 M (41.4%)</td>
</tr>
<tr>
<td>Encourage people to use leave entitlements</td>
<td>0.28 M (17.5%)</td>
</tr>
<tr>
<td>Balance work and leisure</td>
<td>0.24 M (15.3%)</td>
</tr>
<tr>
<td>Spend money and stimulate the economy</td>
<td>0.21 M (13.5%)</td>
</tr>
<tr>
<td>Holiday locally in Australia</td>
<td>0.18 M (11.7%)</td>
</tr>
<tr>
<td>Be active in life</td>
<td>0.13 M (8.5%)</td>
</tr>
<tr>
<td>Promote and support tourism</td>
<td>0.11 M (6.7%)</td>
</tr>
<tr>
<td>‘No leave, No life’</td>
<td>0.07 M (4.6%)</td>
</tr>
<tr>
<td>Other</td>
<td>0.06 M (3.5%)</td>
</tr>
<tr>
<td>None</td>
<td>0.02 M (1.4%)</td>
</tr>
</tbody>
</table>

* Multiple options question—total equals more than 100%
Chapter 5

CONCLUSIONS

This study was undertaken in two stages and at both stages the interest in domestic short-break holidays was evident. In Stage 1, conducted over the final few months of 2008 and in early 2009, focus groups around the country demonstrated a keen awareness of this form of vacation and a commitment to continue regardless of the then dire state of the global economy. Likewise, the industry representatives who were interviewed throughout Australia were generally enthusiastic about short-break holidays and considered them to be a growth segment within tourism, even in tight economic times. Such thoughts were confirmed by the national survey of Stage 2. Even though the survey was conducted over August and September 2009, approximately a year after the Global Financial Crisis began, this cross-section of Australia’s population was generally enthusiastic about short-break holidays and eager to continue engaging in such vacation products. This section will select some of the more pertinent conclusions that have been drawn from the above analysis.

The focus group respondents revealed their major motivation is to get away for a few days to either relax or to pursue special interests. Those personal interests are varied but a considerable number used the opportunity to visit with relatives and friends. Most of their short-break holidays are single destination oriented, with coastal destinations and capital cities being popular choices. The majority would travel 3 – 6 hours to reach their short-break destination, with most using the family car. However, there is rising interest in and use of LCC airlines, especially by those living in metropolitan areas who use the Internet to explore their options and book their choices.

Industry representatives involved with the short-break market were generally enthusiastic about its growth and prospects, plus its constant demand throughout the year in comparison to seasonal long-holidays. However, it should be noted that in some markets (Canberra and Perth) the short-break market was not seen as cost-effective compared to their regular long-stay and business-related market, and in others (Darwin) their relative isolation and associated costs of travel meant that a short-break market is not viewed as a strong prospect. In certain regions and industry sectors we experienced some difficulty in attracting industry representatives to the project, which could be interpreted in a variety of ways—including no interest.

Those industry representatives who did meet with us emphasised, in particular, the short-break holiday’s appeal to busy people who need a short-break from routine, and they thought it was holding up well in the uncertain times of the GFC because it provides an easier and cheaper option to the traditional annual holiday. They viewed the wide array of activities and attractions associated with the short-break market as an asset, because it allowed many communities to become potential destinations and could facilitate dispersion of the market into regional Australia. However, potential destinations would need to develop a critical mass of activities and attractions to attract this market and will need to develop clearer images and brands to gain attention in a competitive market. There was considerable interest in the development of packaging to assist both the consumer and the destination develop mutual access and a more competitive product.

Many of the points raised by the short-break aficionados and the industry representatives were incorporated into the national telephone survey of Stage 2, which is seen as the key part and contribution of this project because every effort was made to make the survey as inclusive and representative of the national picture as possible. It was conducted around the GFC’s first anniversary and a couple of months after the first market promotion of the government’s No Leave, No Life campaign to the general public. The short-break definition used in the survey was 1 – 4 nights away from home and respondents were asked to focus on their holiday experiences over the past three years, which incorporated two boom years and one recession year.

Most respondents were enthusiastic about domestic short-break holidays, with over 70% taking such a holiday over the past three years, and over 50% within the last troublesome year. In confirmation of the literature on past studies most of them chose to get away for relaxation, but a considerable number pursued specific interests while on the short-break holiday. Those interests were varied but an important component for many was the opportunity to visit with relatives and friends. Again, in confirmation of the literature and Stage 1 information, the majority stayed in one destination and their average length of stay was 3 nights. The dominant form of transport was the car, especially for journeys of up to 400 kilometres, but thereafter air transport became more popular.
Short-Break Holidays—A Competitive Destination Strategy

When those who had not taken a domestic short-break holiday over the past three years, were asked about their holiday experiences over that same period it became evident that many had still taken some form of holiday. For some it was the traditional long annual holiday, for others it was a short-break holiday but to an international destination. So the potential to expand on the current level of 70% participation appears strong. However, the major reasons for non-participation are not enough money and personal circumstances which would impact all forms of holiday decisions.

In response to questions on their motivation for-, decision-making on-, competitive alternatives to-, and promotional campaign awareness of- short-break holidays, the national sample revealed both global and local characteristics. In terms of motivation the prime factor is to get away from the routine in order to relax with a change of scene. That change can be entirely focused on rest and relaxation or can include a wide range of activities, but one of the key activities is to visit with relatives and friends. In this regard there were some significant differences between the respondents in metropolitan and regional Australia. Those living in metropolitan areas highlighted the escapism and relaxation aspects of travelling to coastal and country areas, while those living in the regions were attracted to the big cities as well as the coast. While in the big cities they often caught up with relatives and friends, went to sports events and shows, and sometimes combined recreation and business on such trips.

The decision-making process for short-break holidays reflected many of the generic patterns identified by the literature review. The length of planning time was relatively short, though most still took up to three months. Many now use the Internet to gather information on potential destinations, especially the young to middle aged, and as noted in the focus groups when people become familiar with the Internet more are making their bookings that way. Car travel is the preferred form of transport when travelling to nearby or regional destinations, but the airlines are favoured for long distance short-break travel within Australia. The rise of the LCC airlines and their developed network along the eastern seaboard has been a boon to more extensive short-break travel and the use of the Internet.

Competition for short-break funds and time commitment is going to be intense and the survey used the recent stimulus package experience to gauge what happens when individuals receive a windfall. Sixty-three percent of the survey respondents received some level of stimulus payment from the government over the past year, but only a small portion of them used it for some form of holiday (long or short). These holiday spending proportions on holidays may be smaller than we can expect in the future because the respondents were receiving these windfalls in tight economic times, but the results confirm there will be many other essential and discretionary calls on personal budgets ahead of holidays.

In the increasingly competitive world for the consumer dollar short-break destinations will need to focus on the consumers’ destination priorities, and the survey revealed two important destination features in that regard. The largest single desirable feature is a ‘range of attractions and activities’ so the whole travel party will have something to do during its visit. This is particularly important to those family groups with children under 15 years of age; and for those parties including young adults some form of nightlife is most welcome. Closely following the presence of attractions and activities is the ‘presence of friends and relatives’ so the short-break visitors can combine social calls with other visit activities.

The awareness of short-break promotional campaigns was approached incrementally throughout the survey. It was first raised as a general question to non-participants, where 54% claimed to be aware of some such advertising campaign, but they were very vague about the content and message. When the question was later put to all the respondents in terms of any domestic tourism promotions only 33% could recall such a thing, and some of them included some of our past international campaign efforts such as the ‘Australia’ movie and ‘Where the bloody hell are you?’ campaign. This was followed by a direct question on whether they had seen or heard anything about the current No Leave, No Life campaign, where the affirmative vote dropped to 10%. These apparently weak recalls should be tempered by the fact that the No Leave, No Life campaign is in its infancy, and that recall studies often have disappointing results.

The above conclusions have been converted below into specific recommendations regarding the project’s sub-title—developing a competitive destination strategy. These are primarily the suggestions from the principal authors, but they have been accepted by the entire research team.
Short-Break Holidays—A Competitive Destination Strategy

Chapter 6

RECOMMENDATIONS

- Tighten the definition of a short-break holiday to a 2 – 4 night stay in a single destination. This would separate short-break holidays from the excursionist and overnight markets, and encourage destinations to think about creating critical masses of activities and attractions which would appeal specifically to this market segment.

- Develop the local short-break holiday market to provide a good supplement to existing weekday tourism and other forms of business in keeping with its regional character.

- A key to engaging this market is to develop convenient access. This involves access in all forms, be it information access such as the Internet (web pages and one stop booking) for short-term planning; effective marketing access via selected media (T.V. and print) to stand out in a crowded market; convenient transport access (car and LCC in particular) to keep travel difficulties to a minimum; and local activity/attraction access (public transport and packaging) to permit maximum use of local resources.

- The short-break market is comprised of numerous sub-groups, each with its own preferences and priorities. Each short-break destination should determine which sub-group(s) (adult couples, family groups, friends and relatives travelling without children, and singles) it is best able to attract and satisfy.

- Short-break destinations should develop a critical mass of attractions and activities to appeal to the variety of travel party interests within its target market subgroups over a 2 – 3 day period.

- Short-break destinations should focus on providing value for money, which can be achieved via a range of strategies such as offering a unique experience, high quality products and service, or packaging.

- Each short-break destination should develop an image and brand which distinguishes its chosen target focus within this increasingly competitive market.

- Destinations will need to provide a variety of accommodation types to cater to different segments of the short-break market.

- Variations in the ability of destinations to tap into the short-break market and provide a sufficient experience should be kept in mind when designing marketing strategies. The diversity of Australian regions (in terms of weather, remoteness, attractions, visitor services, etc.) needs to be taken into account.

- The importance of a relatives and friends connection reveals the opportunity to influence both destination visits and utilisation through communication and joint promotion with these local hosts.

- Given the wide range of interests exhibited in the national survey many communities have an opportunity to participate in the domestic short-break holiday market.

- Given the direct link between the current promotional campaign and short-break holidays, it is recommended that a full conversion study be implemented for the No Leave, No Life campaign.
APPENDIX A: ANNOTATED BIBLIOGRAPHY—LITERATURE REVIEW SOURCES

The literature review was broken down into various sub-fields in an attempt to address several important components of the short-break market and its relevance to destination competitiveness. Each reference has a code to indicate direct relevance (DR)—as indicated by the title, abstract or key word classification; or indirect relevance (IR)—as indicated by the reviewer’s judgement. The reason for the coding is the relative lack of academic papers examining this issue directly.

Segmentation Issues


While we have been presented with the task of examining the short-break holiday market in Australia and to relate it to destination competitiveness strategies, there appears to be no universal definition of a ‘short-break holiday’. This paper asks the question—Is there, in the mind of the consumer, a clear distinction between short and long holidays? Using a sample of 400 Flemish holiday-makers the author applies open-ended questions and a qualitative analysis; and uncovers the following features:

Perception—‘A short holiday consists of looking for a break, a very temporary stop in the normal living/working rhythm. The idea that ‘life goes on’ remains nearly permanently present in the mind of the short holiday-maker’ (p.12).

Characteristics—Two principal objectives = temporary rest or relatively intense activity with a specific focus (culture, town visit, sport event, festival, …). This could be two sides of same coin, but the author makes no such distinction. Short-break holidays involve mainly domestic destinations, predominantly 300 – 400 km from home. It should be remembered that for Flemings home is within an hour or so of several different European countries. Length of stay = a few days, but not very precise. The author never states whether it includes just one destination or a touring holiday. Pre-holiday phase is not very important, with little planning and lot of impulse buying. Once on the trip more impulse and higher spending than usual, because ‘one has to care for oneself, to live good (sic) during a short, intense period’ p.12).

Length of stay—varies, weekends mainly 2 nights, long weekends (3 nights), midweek (Mon – Friday, 4 nights). If wish to ‘make a black and white division’ then sample indicates ‘a weekend and a long weekend makes a short trip and one week and more is a long holiday’ (p.12).

The midweek (4 nights) option ‘is becoming more and more a marketing tool to tap new segments (e.g. senior citizens) in the short distance market (300 – 400 km)” (p.15).


This paper explores whether a recognised market segment (surf tourists) is truly homogeneous, or whether it could be described and managed better as a set of sub-markets. It also notes that, in common with most sport activities, ‘surf tourists’ do ‘not necessarily only include active surfing participants, but also spectators and non-surfing travel companions’ (p.187). The authors identify six geographic segments (distinctive destination choices, including overseas options) among their sample of Australian surfers, and within these destination segments some significant behavioural differentiators. These include age, surfing ability, daily budget, destination novelty, education and income. They feel such behavioural factors construct distinct destination profiles and can be used to guide strategic marketing initiatives.

Short-Break Holidays—A Competitive Destination Strategy

This is the only direct reference book discovered with respect to short-break holidays, and was obtained via inter-library loan from UTS. It contains five chapters covering a variety of topics:

- Suzanne Mollo-Bouvier, ‘Short-break holidays: where are the children?’, 43 – 52;
- Willy Faché, ‘Holiday villages for the four seasons of the year and the four seasons of life’, 53 – 88;

These five European academics presented a seminar on the topic in 1990 and found a sponsor (Centre Parcs) to publish their findings. While the chapters are now dated they provide some interesting insights. These include:

- ‘Despite the lack of a clear, international definition of short-break holidays, the following components seem to be important: a short-break of between 2 to 4 days; usually taken not far away from home, and at anytime of the year’ (p.5);
- ‘More often than not, short-breaks are extra holidays on top of the normal ‘long’ summer holiday’ (p.5);
- ‘Since the major share of short-break holidays is domestic tourism, spread geographically and over the year, this new form of recreation offers a number of favourable financial aspects’ (p.5);
- ‘One important factor for the tourism industry is the changes taking place in the time that people have free from work to take holidays. The key word here is flexibility’ (p.6);
- ‘A more important consequence for short-break holidays is the psychological attitude of people towards weekend or mid-week holidays. Research shows that besides income and time considerations, the psychological threshold of a first-time short-break holiday is an important factor to cross’ (p.6).

The book provides some food for thought, even though this was researched and written before the impact of budget airlines.


Reference not found in this publication.


This paper reports on an attempt to develop the domestic travel market for Alberta, Canada. As it represents the interests of a provincial market it is automatically referring to many short-break travellers, which is acknowledged when discussing the findings. ‘When it comes to taking a short leisure trip (one to three nights away from home), on average Albertans are prepared to travel for 342 km, or for a period of four hours. Just over half (57%) of their sample plans for a short-break trip over a period of one to four weeks. The top activities on these leisure trips are visiting family and friends (75%), taking trips that involve outdoor recreation (67%) and visiting resort towns and attractions (39.5%)’ (p.268). The paper goes on to identify five cluster segments within this domestic market and presents a marketing campaign to encourage more local travel.


This text covers the fundamentals of segmentation. It notes that the mass market has splintered into a myriad of special interest segments, and that tourism needs to identify market segments that can be targeted with the appropriate blend of products and marketing to produce desirable yields. It discusses the basic segmentation typology of geographic, demographic, psychographic and behavioural characteristics (Chapter 8); and goes on to recommend selection criteria and linking it to the philosophy of competitive advantage.


This paper is concerned with the growth of the short-break market and the need to give it some statistical
Short-Break Holidays—A Competitive Destination Strategy

recognition and academic investigation. Its definition is ‘a short-break holiday is characterised by the duration of the trip (up to 4 days, but at least one overnight stay) not by the length of stay in an accommodation, resort or (anything) else’ (p.15). Hence it is a consumer-based definition. Using European data Lohmann makes the following observations:

- Short trips normally do not replace longer holidays.
- Number of short-break holidays is dependent on the economic situation, volume of leave entitlements and role of leisure in the domestic society.
- Demand is influenced by the offer of tourist infrastructure, e.g. Center Parcs in the Netherlands.
- Destinations are mainly within the home country.
- Private cars are the main form of transportation.
- Homes of friends and relatives play an important role, but author expects commercial accommodation to increase as market matures and industry sees a larger opportunity in this market.
- Travel motives are different from long vacation trips. They travel to escape from everyday routine, and not to have a real rest. Short-break holiday-makers are eager to experience things like cultural events, sports or shopping. They spend more per day and per person than on long holidays.
- More than one-third undertaken by single traveller, much more than for main vacation.
- Short trips tend to be more off-season oriented.

The author warns that a substantial economic impact can only be expected if a destination specifically tailors its ‘offer’ for this segment. This will require market research and taking into account the necessary infrastructure costs, crowding/traffic implications and other ecological impacts in order to calculate net benefits.


This paper examines the link between length of stay and levels of visitor satisfaction using a sample of 826 Virginians divided into short-term (1 – 6 nights) and long term visitors (7 plus nights). No justification is given for the split and the paper asks three basic questions. The results are 1) Long-term visitors were more satisfied with the quality of tourism service providers than were short-term; 2) Long-term visitors reported greater satisfaction with perceived efficiency (‘freedom from defects’) than short-term; and 3) Long term visitors reported greater levels of satisfaction with the cost of the trip than short-term. One logical and useful suggestion from this paper is that ‘product development (be) designed to cater to the special on-site experience needs of guests with differing lengths of stay’ (p.174).


While this is a dated study dealing with international visitor patterns to Australia, it has some relevant points for our project. Oppermann observes that official Australian travel statistics ‘remain fairly general, and the regional distribution of the tourists is only measured by state visits or state person nights. No data is provided on the number of destination visits. The spatial travel patterns within Australia is (sic) ignored too’ (p.60). He conducts a broad spatial analysis of government data relating to international tourist visits and unearths the gateway and icon destination dominance, plus the extensive under-use/appreciation of regional Australia. He concludes that 1) The spatial preferences of international markets seem fairly stable, indicating that each state has a different market composition; 2) Stable market preferences allow for more specific growth and dispersal management; 3) Spatial dispersal patterns are heavily influenced by the amount of travelling time available and the presence of an F.I.T. market. As a result he advocates a move away from traditional marketing with its primary focus on raising visitor numbers, with secondary interest in how long they stay, how much they spend and what they do; to a more contemporary emphasis on determining the national tourism resource base at a regional level and identifying current and potential visitor markets for each region.


This study examined ‘short-term’ visitors to mountainous areas of Greece during the summer months and attempted a segmentation analysis that incorporated the concept of satisfaction. Short-term to these authors is a vacation of 1 – 6 nights, using the recommended division of Neal (2003). They note that ‘short-term visitors have not been studied adequately in (the) travel and tourism literature’ (p.65); and make a case for including satisfaction in a segmentation analysis, based on fact that it can differ from segment to segment and could be linked to other segmentation variables included in this study (demographics, benefits, activities and
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psychographics). Their actual study related to 115 individuals who participated in 3 day/2 night excursions to the mountainous region of Hepeiros during the summer months. A cluster analysis identified two groups ‘highly satisfied’ and ‘less satisfied’ with the three day trip. These satisfaction segments could be linked in terms of statistical significance with family status, age and education, but not with preferred physical activities and perceived competence levels. Using this information market segmentation could benefit destinations if they emphasised satisfaction as a key criterion and linked it with the three identified demographic variables.


The authors have attempted to improve on the standard consumer choice models by including the two stages of the evolved evoked set from the awareness set and actual destination selection from the evoked set. It is hypothesised that attitude helps to determine actual choices at each stage. Using college students and park personnel they assemble a usable sample of 100 respondents in a longitudinal study, thus reflecting their decision-making process progression over time. The hypotheses were proven and they conclude that as consumers move from the initial evoked set of choices to the actual destination selection they simplify the process by creating perceived inhibitors and facilitators, rather than consider all pertinent variables at each stage.


This paper offers a new alternative to the standard methods of segmentation, namely the ‘trip index’ as a sign of the visitors’ commitment to a destination in terms of the relative number of nights they commit to it. Using this approach, visitors to South Carolina were differentiated into ‘low intensity’ (1 – 30%) visitors, ‘medium intensity’ (31 – 60%) visitors, and ‘high intensity’ (61 – 100%) visitors. For intensity we could read commitment or loyalty. The authors found that the trip index help to identify differences between visitors on holiday or pleasure trips, who tended to stay longer in one destination, compared with those interested in historic and cultural sites, and those who tended to travel from place to place. As such they feel the trip index adds an important extra ‘length of stay’ dimension to our standard segmentation approaches, which could be relevant to such a poorly defined area as short-break holidays.


This paper examines the differences between mature travellers (over 50) and young travellers (under 50)—a rather broad differentiation, in their travels to Wisconsin’s Northwoods region. It is not a particularly helpful paper, but it is one of the few that focuses on a recognised sub-group within the short-break market—the seniors market, and has a good bibliography. Findings from this study, which used secondary park data, included: significant socio-demographic characteristics between seniors and the rest; seniors travel longer and further; even though seniors have a lower income it does not mean they spend less, given that many have paid off major expenses like house and car debt, and seniors prefer to travel outside of the peak summer months.


This paper, in effect, analyses aspects of the short-break market in upper New York State because its definition of a near-home tourist is ‘up to two hours away from home’; and it uses a benefit segmentation technique to identify this segment’s characteristics. Based on the benefits sought it identifies six separate segments—Entertainment, Comfort and Amenities, Shopping amenities, Security and scenic beauty, Affordable variety and Culture appreciation. They also identified five lifestyle factors, these being—Traveller, Planner, Adventurer, Psychocentric and Similarity/Cautious. They conclude by reminding us ‘The segment whose needs are closest to the competencies offered by the destination should be a candidate to be chosen as the target segment assuming that the segment performs well on other criteria of segment attractiveness such as growth, size, quality of the segment …’ (p.52).
Consumer Decision-making


  Author tests whether traditional multi-variable consumer choice models really do apply in all holiday situations. She believes that such complex choice models may not be relevant to holiday decisions which require little investment and thinking like purchasing ‘convenience goods’ (so it can apply to short-break holidays), compared to annual and overseas trips which can be viewed as ‘shopping goods’. The paper focuses on 30 informants via 20 interviews, seeking information on general choice patterns rather than specific destination choices. Found that many tourists do follow the traditional consumer choice models, but even in relatively complex situations involving major commitments the actual decision-making process becomes routine and habitual.


  This paper explores the level to which friends and relatives influence the decision-making process beyond the role of information provider, using a small sample of heritage trail visitors in southwest Pennsylvania. The sample of 71 non-local visitors was selected on the basis of ‘visiting a site with friends or relatives, or were visiting friends or relatives in the region’ (p.62); so they found some influence being applied, but they note ‘friends and relatives shape behaviour in a more direct fashion than simply providing information and in many cases take on the role of ‘sole’ decision-maker’ (p.65). They also note friends and relatives took on a ‘dominant role’ or ‘equal role’ in many instances.


  Although this paper makes no reference to our topic in its title or keywords it involves ‘the choices of short-break destinations by residents from Melbourne’ (p. 445). Definition of short-break is 2 – 3 nights’ duration. Huybers starts this ‘stated choices’ study with focus groups to identify the attributes people are seeking in short-break holidays (turns out to be amenities, level of crowdedness, environmental quality, presence of a festival or event, expenditure [cost] per person, season and travel time); and to identify their preferred short-break destinations ( turns out to be Canberra, Goldfields, Great Ocean Road, Mornington Peninsula, Phillip Island/Gippsland, and Sydney—in alphabetical order). However, these figures only represent 49% of the actual recorded short-break destination travel in 2000. When he undertakes the market share simulations based on the established attributes and demographic characteristics his sample is generally consistent with market order, but seldom accurate with the actual market share. He feels the ‘results highlight the importance of the quality of amenities and level of crowdedness at the destination to the utility of nearly all destinations. For the majority of destinations … the staging of an event or festival positively affects destination utility, … On the other hand, the environmental setting and length of travel time do not appear to be major discriminating decision factors for short-break tourists from Melbourne. [This was an STCRC project].


  The paper examines the use of a ‘stated choice modelling survey (which) yields data on consumer’s responses to hypothetical choice scenarios’ (p.390) for Sydney residents considering a short-break holiday in surrounding regions. The first part of the study is focus group sessions with Sydney residents, to identify their popular short-break destinations (turns out to be Canberra, Central Coast, Central West, Hunter Valley, Mid-North Coast, South Coast, and Other NSW Regions which is the biggest single grouping by far) and their six key considerations ( which turn out to be Crowdedness, Nightlife, Price per Day, Season, Travel Time, Type of Attraction). This is followed by a survey where Sydneysiders are asked to make theoretical choices between the six identified short-break destinations. The similarities between predicted daily expenditures and recorded expenditures in each destination are fairly close, as were the destination market share results. ‘The modelling results show that a destination’s attractiveness to prospective short-break visitors from Sydney is enhanced—to different degrees—by lower prices, being moderately busy, having a moderate level of nightlife, being visited during spring/summer, being accessible within two hours’ travel time, and offering a mix of natural and cultural heritage attractions’ (p.403).
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This paper examines consumer constraints to undertaking short-break vacations, utilising a modified leisure constraints model. Conventional constraint factors (time, distance, available transport, awareness and promotion, and competitive choices) are examined, along with some new factors such as peer and family influence, money, and intra-urban facilities. These issues were raised within regional focus groups in relation to short-break holidays in Melbourne. Many of the respondents confirmed the conventional and some of the new factors, however there were some interesting new findings. ‘Time’ was needed in order to make the break, but many were ‘time poor’ when they arrived because of family/friends commitments or planned commitments like shopping or personal treatments. This leaves less discretionary time for leisure pursuits than often imagined. Likewise, most short-break holiday-makers were reliant on local friends and relatives to tell them ‘what’s on’ during their visit, so these locals could form an effective promotional medium.


This somewhat dated reference provides a useful technical reference for our research design approach. It demonstrates the usefulness of the focus group approach to the study of destination choice, and promotes the use of psychological theory relating to humans’ three alternate personality states (child, parent and adult) in the selection process.

- Raybould, Mike; Digance, Justine; and McCullough, Caroline (1999). Fire and Festival: Authenticity and Visitor Motivation at an Australian Folk Festival. Pacific Tourism Review, 3 (3/4) 201 – 212 (IR).

This is an empirical study of visitor motivations of attendees at the Woodford Folk Festival on Queensland’s Sunshine Coast. It is reputed to be one of Australia’s largest festivals, running 5 days (hence a short-break holiday) and generating an additional 32,800 visitor nights and $2 million in direct expenditure during the 1997/98 Festival. A factor analysis of 536 attendee interview responses revealed/confirmed the presence of five motivation dimensions of ‘Learning’, ‘Family’, ‘Social stimulation’, ‘Authenticity and uniqueness’ and ‘Escape’. Such motivations could be explored in the wider context of short-break holidays.


In this paper Pike attempts to demonstrate the utility of using ‘Top of Mind Awareness’ (ToMA) as a predictor of destination choice, using his Auckland short-break data set—see next section for details. He feels ToMA, as identified by unaided recall, can identify the hierarchy within a consumer’s evoked set of destination choices. He uses ‘intent to visit’ as his dependent variable and finds intent was higher for those destinations (Coromandel and Rotorua) which had been identified as the ToMA choice. Unfortunately, as he states, there was no data to determine if these intentions were converted into actual visits.


This paper uses IPA to determine the positioning of short-break destinations in New Zealand. Pike examined 763 consumer IPA assessments of five competitive short-break New Zealand destinations (Rotorua, Bay of Islands, Coromandel, Mount Maunganui, and Taupo) using 20 potentially differentiating attributes. He identified 11 ‘determinant attributes’ which could differentiate between the five destinations, and these were confirmed via industry feedback meetings. The study and industry confirmed the presence of universally important and situation specific destination attributes; and suggested two important marketing strategies are 1) to cut through the media clutter, communications should focus on only a few key features, and 2) easiest route to attract visitors is to reinforce their current positive perceptions. Pike undertook an associated study of how Aucklanders differentiated short-break destinations, as discussed below.

Short-Break Holidays—A Competitive Destination Strategy

In this paper Pike defines short-break holiday as a non-business trip of 1 – 3 nights. Note that this definition, like most others, is from the consumers’ perspective; therefore it could be a touring trip which involves a night in different destinations. Half of New Zealand’s 26 regional tourism organisations (RTO) rate Auckland as their region’s first or second most important visitor market, so Pike attempted to identify the destination attributes that 25 (repertory grid surveys are time-consuming, so interviewed 15 industry managers and 10 young singles [students]) Aucklanders deemed salient to short-break destination choices. Found the top five attributes selected by his sample were lots to do, within a comfortable drive, sea/beach attractions, water sports, good weather; which interestingly differed significantly from practitioners’ views and literature determinants.


Yet another analysis of the above Auckland short-break holiday data; this time with a destination positioning emphasis linked to the cognitive attributes deemed important by Aucklanders when considering a short-break holiday—those attributes being the three component parts of attitude construction. This new analysis confirmed the strong presence of Rotorua and Coromandel in the minds of Aucklanders, and clearly demonstrated they offered different images—Rotorua being seen as stressful, arousing and exciting; while Coromandel is viewed as sleepy and relaxing. The authors consider such analysis will help Regional Tourism Offices differentiate themselves in a competitive market and indicate where marketing and product development would be most beneficial.


This paper is a follow-up of Pike’s previous work in New Zealand. This time he examines destination decision sets of Brisbane residents and checks on their reliability with a two stage instrument. His original sample of 523 households indicated a keen interest and commitment to short-break holidays (herein defined as 1 – 5 nights, but with no explanation), with almost half indicating a likelihood of taking a short-break holiday in the following quarter. The maximum driving range for a short-break holiday was four hours and the vast majority used their own car because this study was undertaken just before the arrival of budget airlines. The sample’s destination set covered 120 potential destinations which indicates how competitive this market segment can be. Stage 2 showed almost two thirds of the sample had indeed taken a short-break holiday in the following three months. Distribution of those holidays was Sunshine Coast (37%), Gold Coast (26%), Fraser Coast (9%), Coral Coast (2%), Discovery Coast (1%). Almost half of the stage 2 respondents listed the same ToMA region in both surveys.


A major part of the federal government’s No Leave, No Life campaign is this promotional insert in some of our leading national papers. In addition to various domestic tourism offers, many of which encourage short-break holidays, the insert carries short pieces on the health benefits of holidays and carries endorsements from a selection of individuals from various demographic backgrounds. Among its statements regarding the benefits of taking annual leave, the insert maintains on p.7:

- Australia is the world’s third most holiday deprived nation;
- We have stockpiled a massive 123 million days of accrued annual leave;
- One in three full-time employees have (sic.) accumulated 20 days or more of annual leave.

In a section on ‘Short-Breaks’ the insert notes ‘with cheap domestic airfares aplenty, a luscious long-weekend is no longer limited to destinations close to home, so the choices are wide and wonderful!’ (p. 10). This statement is followed by a range of short-break suggestions and advice regarding how to handle the work situation and to get the most out of the holiday experience, ending with a reference to www.noleavenolife.com.
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Consumer and Host Community Experiences


This is a review of tourism development in the UK which examines changes in consumption and the geographical organisation of production which are leading to new supply-side structures and potential theories. In terms of consumption changes the authors note ‘It is becoming increasingly heterogeneous in terms of places which are tourist destinations; the range of tourism activities undertaken in such places; and the diversity of capital formation’ (p.244). They focus on the supply restructuring that has responded to the consumption changes and note the restructuring that has occurred in rural areas and in traditional coastal resorts, among others. They conclude with the need to:

- theorise the restructuring of tourism;
- apply the critical success factors approach to understanding the competitiveness of tourism businesses;
- review the role of partnerships in restructuring tourism production;
- have greater ex-poste evaluation of publicly supported regeneration programs.

It concludes with an extensive UK bibliography.


This paper examines travel involving sport participation using Canadian national data for 2000 and is relevant to this study because many of the trips meet our short-break definition. The data showed most sport related trips went to mid-sized cities, where participants travelled by car and spent 1 – 3 nights. ‘Cluster analysis revealed four groups of sport-related Canadian domestic tourists: Focused Sport Tourist (39%), VFR Sport Tourist (30%), Urban Vacationist (17%) and Outdoor Vacationist (13%)’ (p.221). The first two travelled essentially for the sport, the latter two were either sport spectators or watching sport as part of a larger vacation. The authors noted ‘sport-related travellers are not a homogeneous group. However, core consistencies within all of the groups are present, namely the merging of sport-related activities into the broader tourism context’ (p.223). They feel ‘One way to overcome the problems created by the heterogeneity of sports tourism is to focus on the motivations of sport tourists’ (p.225), which is what we have done in the national survey, given the emerging heterogeneity in Australia’s short-break market.


This is a short discussion paper based on UK experiences that highlights the rise of this market and has some points of relevance for us. Among those noted are:

- ‘It is difficult to determine what a short-break is, largely because the travel industry itself is not prepared to agree on a definition. A working definition would cover the following characteristics: accommodation provision usually of two to three nights’ duration; fares for transport; and, increasingly, admission charges and fees depending on the purpose of the break.’ (p.103).
- ‘Short breaks supplement annual holidays overseas and tend to be booked at short (about one month) notice and are usually taken in the (spring) and (autumn)’ (p.104).
- ‘The short breaks market is very much concerned with variable costs and the utilisation of existing (under-used) capacity. It is significant that hotel chains were amongst the first in the market and, in many respects, short breaks were supply led’ (p.105).
- ‘Many (public) organisations have found that by working in liaison with the private sector (particularly hotels) not only can costs of protection and upkeep be met but also that actual profits can be made from short breaks. Thus, revenue can be raised at the same time as increasing public access to the gifts of the nation’ (p.105).

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The article reminds us that effective segmentation should include groups which are: measurable, assessable, substantial and reliable; and the goal of segmentation strategies is to ‘help decision-makers (sic) identify the markets they should serve to meet their objectives’ (p.26). They test the segmentation patterns of visitors to a remote part of the state of Michigan, Traverse City located 244 miles from Detroit and 310 miles from Chicago. They identify four clusters of visitors and found five attributes consistently emerged (water sports, scenic beauty, R & R, suitable accommodations, positive local attitudes). There were no significant demographic differences between the clusters, and it is notable that the largest ‘length of visit’ group was 2 – 3 nights (56.5% of sampled 306 visitors), which with the addition of another 7.2% staying one night would indicate this destination had a significant short-break market. Perhaps its regional location and short-break emphasis will make this a significant comparison for some.


In line with the growing interest in accumulating unused leave, this paper makes the point that if much of the unused Australian leave does become converted into domestic tourism it will probably increase the stress for another sector which faces work-life difficulties—the tourism industry. So it asks us to consider improving the situation not just for Australian citizens but also for workers in its tourism industry who already face unsocial hours, shift and casual work issues, and a difficult job. Based on an examination of key antecedents to the issue of work-life balance the authors provide a more comprehensive framework by which to assess both the demand and supply consequences.


This newspaper article reports on a declining domestic travel market over the past decade, with a particular lack of interest expressed by Australians under the age of 35. It cites a recent Morgan survey that reveals ‘the number of people intending to stay in Australia for their next break fell from 61 per cent to 57 per cent’ (p.3).


This forecast for the forthcoming summer season in the USA indicates how Americans are likely to adjust their holiday patterns within this current recession, and the changes will include an increase in short-break holidays. According to Jim Lehman (AAA East Central) ‘people are substituting shorter vacations, maybe longer weekends with a Friday and Monday off work, or a week in Florida instead of two weeks in Europe’. These observations are supported by David Lytte (editorial director of Frommers.com) who says ‘economic concerns were driving a resurgence in regional travel’ (p.2). An AAA survey indicates 32.4 million Americans will be taking a trip of 50 or more miles (their definition of a tourist), of which nearly 83% will be road trips, this summer. So various types of adjustment rather than abandonment are forecast, whereby people can continue with some form of holiday, even in hard times.


The article refers to Western Australia’s positive tourism performance in the face of the GFC and relates the positive news to the ‘rising fortunes of the budget airline industry (which) is helping the sector survive the global economic downturn’ (p.1). This relates to international as well as domestic visitors according to Graham Moss from the Tourism Council of Western Australia, where ‘there has been an increase in terms of low cost carriers operating out of Singapore, Malaysia, Indonesia—that has certainly boosted international movements—and there’s also certainly been an increase in intrastate movements’ (p.1).


This paper examines the tourism potential of sport fans using the evidence of the University of Florida (the ‘Gators’ with a stadium attendance of 84,000) during two American college football seasons. They found that most fans arrive on a Friday and stay until Sunday, so they do more than attend the game on Saturday afternoon. They differentiated between Gator fans who come primarily for the game and sport tourists who engage in other...
activities, like sightseeing. They conclude that ‘college sport in the US and similar small-scale-sport events in general, hold some untapped potential for tourism in the communities hosting them’ (p.189). What they say is true but hardly new; I am an Ohio State alumnus where the stadium capacity is 110,000 and full for every game; so the capital city is packed on each game day weekend, especially around the northern suburbs where the university is located. The challenge is to manage these opportunities to raise the destination’s overall yield and minimise the disruptions that such ‘invasions’ can cause.


This paper examines the practical aspects of managing the short-break market within Center Parcs, UK. ‘Predominantly (their short-break market) stay is either for three-day weekends (Fri – Mon) or a four day mid-week break (Mon – Fri)’ (p.174). Center Parcs has become very successful in the UK, and as part of that success has taken over Oasis, a rival business. This paper explores how Center Parcs integrated Oasis into its successful short-break strategy. It is essentially a business case-study paper.


This is an unusual paper, in that it is based on a lengthy conference power point presentation by the author, who appears to be a senior Canadian bureaucrat. Most of the paper is based on justifying the importance of sport’s economic impact on city (destination) economies, but it contains some references to our project objectives. He argues that sport and tourism go together, ‘more sport tourists are now practicing and observing sports on their holidays … a sports tourist may be a participant or a spectator’ (p.53). He mentions the PARRC Continuum method of forecasting sport tourism attendance and impact, which involves counting every conceivable visit associated with an event. The initials stand for the Prelude, Attendance, Retention, Residuals, and Continuous aspects, which can conceptually cover several years for a single event. To get the most from an event using the PARRC approach he advocates that sport event organisers 1) collaborate with everyone (tourism industry, sport associations, local government, etc.); 2) plan for retention (keep sport tourists in the locale with other activities); 3) package activities (both sport and non-sport); and 4) offer return incentives (coupons and discounts). The author notes it is possible to use sport events as a loss leader which actually generates a positive return for the host destination. He suggests ‘the sports tourism field will succeed and benefit through collaboration and linkages’ (p. 68).


Law’s interest in urban tourism has led him to notice the existence of short-break holidays, so remains one of the few to mention it in academic texts. In this collection of international cases, he draws the reader to its potential in his ‘Conclusion’ chapter; where he considers ‘The short-break market is critical to the future of tourism in large cities yet there appears to be relatively little detailed research on how consumers make their decisions’ (p.250). Over a decade later that still seems to be the case.


Law’s interest in urban tourism encourages him to devote two pages of this textbook to the topic of ‘short holidays’. He defines these as ‘1 – 3 nights away from home’ based on the influence of past English Tourist Board surveys, but acknowledges ‘a few surveys have included up to 5 nights’ (p.58). Using British survey data he notes the continuing growth of short-break holidays through the nineties and mentions how their composition has changed over that affluent decade, with a fall in the VFR market (44% to 35%) and a concomitant rise in serviced accommodation (25% to 37%). He also notes how cities and large towns ‘have now become the most popular type of destination, overtaking seaside resorts which have lost popularity’ (p.59).

Law makes an interesting observation on the recession resilience of short-break holidays. He notes that during the eighties and early nineties short-break holidays were among ‘the first (vacation type) to be cut when money is short’ (p.58); but since then they have become more popular and established, so that ‘many in the industry consider that they have become more recession-proof’ (p.58). Something we have explored with our national survey.

This article from The Economist Publications Ltd. is a dated but still useful reference, which discusses the rise of the short-break market in the UK. Among its interesting findings it notes:

- There is no common definition, which makes it difficult to identify the size of this market;
- A short-break is more than a matter of nights, it is focused and can be packaged;
- ‘Probably more than six out of every ten trips … are not part of the commercial sector’, so it is generally under-reported (p.47);
- It has broad appeal across all socio-economic groups;
- Around three-quarters of all short-break takers typically book a short-break holiday in addition to their main holiday;
- ‘In the case of the small operator and the specialist short breaks market, carefully targeted advertising and direct mailing (1986 data) are still the main marketing tools’ (p.51);
- ‘The future for the commercial short breaks market is healthy and a growth rate of 20% per annum appears sustainable’.

These results have been reflected in the early analysis of this study and provide some relevant questions for the national survey.


The paper argues we have ‘a very limited understanding of the relationships between tourism and QoL (for tourists and host communities)’ (p. 170). Quality of life (QoL) has been defined by the OECD as the ‘the notion of human welfare (well-being) measured by social indicators rather than by ‘quantitative’ measures of income and production’ (p.161), and reminds us to look beyond the cash and business measures of success to see exactly what we are getting for all this effort. Of particular relevance to this project is the attempt to dig deeper into why tourists either choose to travel or not. The small survey reveals that for many the reasons not to travel include ‘the financial costs of travel, the fact that people are happy with where they are [their home and local community] and what they know [‘my brain is full’ syndrome], and the stress of planning for travel and actually travelling’ (p.166). Such sentiments have been examined in our national survey and can act as pointers for destinations wishing to increase their short-break market.


This paper examines the links between QoL and the holiday maker. It is felt that vacation time makes a positive contribution to individuals’ QoL through allowing them to pursue a range of interests, by providing an opportunity for social interaction, personal development and the formation of individual identity (which supports Maslow’s ‘self-actualisation’ stage). However, there are a number of structural constraints to this process. These include a ‘time squeeze’ in many advanced economies, a tendency to turn vacations into multi-purpose activities, the various interpretations of vacation as a ‘social right’ between Europe and North America (and possibly Australia), the inequitable distribution of vacation and free time around the world. These factors have resulted in different vacation consumption patterns around the world, including ‘As vacations became an established element of consumption for most people, the focus of growth shifted toward second and third vacations or short breaks, which are taken predominantly by those in higher socioeconomic groups’ (p.XX).


This is an ad hoc annual report that discusses the short-break market in one of Australia’s capital cities, using NVS and HTS data. Definition of ‘short-break’ is ‘visitors who spent between one and three nights in the Brisbane region’ (p.3), and came from a radius of 400 kilometres, thus it looks primarily at the domestic regional market. It presents a positive picture, with arrivals up by an annual rate of 3.2% between Dec. 2002 and Dec. 2005. It notes that ‘almost half of all short-break visitors were VFR’ tourists (p.6); and the average stay was 1.58 nights. It claims the interstate market (NSW and Victoria) has been flat, but still represented 49% of all short-break visitors to Brisbane (you work out how this can be, given the study’s supposed 400 km radius). Thirty-one percent of all short-break visitors used commercial accommodation; 30% recalled Brisbane advertising in the year 2005; most (87%) drove to Brisbane; the most popular activities were VFR (62%), eating out (48%) and shopping (29%). These statistics could make some interesting comparisons with other capital cities.
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This part of a larger study has some relevance to the short-break market, including some discussion of ‘short-break passengers’ who are defined as being ‘in Darwin from 24 hours to 3 days’. Short-break visitors represented 14% of those airline passengers surveyed, while in comparison 60% were long-break visitors, 20% were transit visitors and 6% stopover visitors. Notable short-break features included: a planning time of 4 weeks or less; 67% of all leisure travellers used the Internet to book their flights; short-break and long-break visitors travelled beyond Darwin, going to Adelaide River, Lichfield National Park, Bachelor and Katherine; 44% of short-break visitors were very satisfied with their visit. Identified constraints included: flight schedules often worked against a short-break for in-transit passengers.


These short data summaries extracted from the National Visitor Surveys provide an overview of selected destination visitor profiles, some of which have a significant short-break holiday market or potential. In Victoria we are finding the Bendigo and Alpine resorts particularly useful, and in South Australia the Barossa report.


A definition of 1 – 3 nights is used in this study. Paper notes contributing growth factors include: increased availability of cheaper airfares; two income households with limited time for extended holidays; pace/stress of modern urban living creating a need to get away and recharge. Findings from an unidentified survey include: short-break visitors spend more per person per night than those on longer touring holidays; 63% of them were repeat visitors, vast majority travel by air (87%) and once at destination 74% self-drive and go on short trips in and around their port of entry; 88% use commercial accommodation; 55% travelled as couples, 14% as small group of friends, 9% as individuals and 8% as family with children.


The authors see ‘A destination (as) a bundle of services and products, and providers of these services and products have conflicting and sometimes incorrect impressions of the views and evaluations of their visitors’ (p.292). Using Olympia, Greece as a case study the authors conduct a gap analysis of visitor experiences and supplier expectations. Their findings confirm earlier studies that on the whole visitors have a more positive outlook than many suppliers predict, but there were a few areas where the Olympian suppliers overrated their performance. 1) Tourists rated attraction, prompt service, food variety, competitive price, product variety and shop personnel friendliness lower than expected. 2) Suppliers overestimated tourist satisfaction levels with the tourism trade within the destination. 3) Suppliers overestimated tourists’ attitude toward the destination and its residents. There is an excellent reference section, as is often the case with Ph.D. student papers.

Travel and Access Issues


This is a consultant’s report from the Mintel International Group and now somewhat dated, but its prediction about the continued growth of what we now call Low Cost Carriers (LCCs) has been spot-on. It reviews the reasons for the LCC growth and provides a comprehensive analysis of the European scene, a fair analysis of the North American situation, but a most sketchy one of the evolving Asian situation. As such it provides some interesting background material, such as Sir Freddy Laker being the real pioneer of this form of travel, but little that is of direct relevance to this topic.


This paper reviews the development of LCCs around the world and has some overlap with the previous reference, although its approach this time is to review the performance of various individual airlines. It makes
some interesting observations that have pertinence to this study, namely:

- The LCC focus is ‘on smaller ‘local’ airports where servicing costs are lower and where direct competition from major flag operators has been either minimal or non-existent’ (p.3).
- These operations can develop into major regional economic growth stimuli.
- Their success is based on cutting costs to the bone and packing people in with ‘limited-pitch seating’.
- Most flights are 1.5 to 2 hours.
- This ‘Low-Fares/No-Frills’ concept has now spread around the world.


This paper examines the relationships between budget (LCC) airline growth and the business prospects of regional airports in Europe. The authors note the strong growth of LCC airlines in Europe and the expectation they ‘are expected to take 25 – 33% of the short haul European traffic by 2010’ (p. 507). Part of their success is that they ‘offer life to smaller airports and tourist destinations since they have searched for locations away from major congested hub airports in the main and the low fares offered have stimulated traffic from (and to) regional points’ (p.509). Several themes emerge from their interviews with smaller regional airports around Europe:

- There can be no single business model for airports because of their different ownership and geographical contexts;
- Need to appreciate the volatility of the low-cost market and link this to their long term plant investments;
- Need for equity regarding long term contracts with major airlines;
- Lower priced landing fees etc. for LCC airlines could be balanced by extra revenue from retail and parking facilities;
- Innovative contracts can be devised that share risk and benefits with this new type of carrier.

For those wishing to delve further into this aspect of short-break tourism, there is a good starting reading list associated with this paper.


The paper is based on interviews with airline marketing specialists with respect to some major European LCCs. The airlines have the budget traveller as their general target, but within that there are some definite segments, one of which is the ‘leisure traveller and VFR’ market. However, the paper focuses on internal management issues such as marketing, communications, and culture rather than on market segments and their destination objectives. It does mention a need for them to ‘concentrate on the market potential of different routes and spend a great deal of time in identifying new development opportunities’ (p.313) in their future strategies; which is where potential partnerships with existing or new destinations can take place.


This paper has been included because of the topicality of its theme in general during this GFC as well as its relevance to our project. Graham raises the type of question that businesses consider so seldom, namely will there be an end to our good times? In terms of the UK market she concludes the UK international leisure air travel market, which of course is mainly Europe, is at the ‘early stages of maturity’, while the overall leisure travel market is nearer to full maturity. Graham sees an important aspect of the UK’s international air travel market is the growing short-break market.


This paper examines the major forces driving leisure airline trends, which it identifies as factors such as the length and time of the journey, fares and range of services offered, service quality and level of competition. In terms of our project some relevant observations include the fact that fares have dropped in low cost carriers more than any other part of the tourism product; while holiday entitlements have generally increased, greater work pressures and fears about job security have reduced the take-up of these opportunities and led to a trend to
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shorter holidays. A UK survey reveals short-break holidays by air have increased and the proportion of residents taking three or more such holidays between 1999 and 2003 had risen to 32%.


This is a rather general paper which describes the situation in Europe based on a series of semi-formal interviews with airport managers. These interviews confirm the growth of low cost carriers (LCC) throughout Europe and that they are on their way to meeting the predicted 25 – 33% of short haul air traffic in Europe by 2010. The authors note ‘approximately 200 airports in Europe can be classified as underutilised with less than 1 million passengers per annum and the majority are loss-making, publicly owned and subsidised by central or regional government’ (p.509). This and their high fixed costs has made the marginal cost of servicing LCC very low ‘due to the availability of spare airport capacity and the fact that additional passengers add little to terminal costs’ (p.510). Their survey of various European second tier airports reveals that there is no single strategy to recommend, but some cautions to offer. Airports need to strengthen their destination appeal if they wish to be in the best bargaining position. Airports need to recognise the volatility of the LCC market and the possibility of services being withdrawn. Airports need to develop innovative risk sharing and benefits with the LCCs.


This interesting paper explores the trade-offs regional Australia may face in having increased access to LCC airlines. Using a popular travel corridor between Sydney and Byron Bay (800 km or 8.5 hrs drive north of Sydney) the study asked tourists under what conditions they would substitute airline and car travel for the journey. ‘The results empirically demonstrated that travel mode choice can be an avenue of conflict between LCC service proliferation and tourists’ regional dispersal’ (p.14), meaning that as airline fares dropped more people were attracted to direct LCC flights to the area, which reduced regional visitation along the Princes Highway route between the origin and destination, plus a reduction of local regional trips around the Byron Bay area.

The suggested recommendation is that there be increased packaging between the airlines and Byron Bay car hire firms, but that future research would be needed to see if tourists used their cars to visit the rural hinterland or other coastal destinations.


This paper examines the movement patterns of tourists within a destination (Hong Kong). Factors affecting tourists’ choice of travel patterns include human factors (type of individual, motivations, etc.); physical factors (destination layout and transport options); trip factors (main or secondary destination, first time or repeat visitor); time factor (length of stay). The average length of stay from this sample of international visitors was 4.6 days and the overall dispersion of trips was broad, but differences in visitor patterns were noted when first time and repeat visitors were compared. Regardless of their length of stay, visitors showed more spatial activity in the earlier days of their visit.


This is an econometrics type of paper, where a variety of different models/equations are used to assess the cost or benefit value consumers place on travel time. Using a small sample of fishermen travelling to a Colorado Lake they come up with varied and inconclusive range of results; leading to the statement that opportunity time values can differ markedly between different contexts. As such it is not much help to us for this project.


Market access is viewed in this paper as ‘the attractiveness of similar destinations based on a comparison of their relative proximity to their markets’ (p.39), and can be measured by the relative difference in the time, cost,
distance, or effort required to access different destinations. The paper examines the effect of market access on visitor mix at eight destinations located along the Princess Highway, between Melbourne and Sydney. McKercher found a direct relationship between market access and a destination’s ability to attract first-time visitors (mostly internationals), whereas destinations with poorer access rely on their ability to attract repeat visitors (mainly local domestic travellers). He found the ‘single-market approach overly simplistic as most destinations serve multiple geographic markets, each with its own unique relationship with that destination’ (p.44). For example, NSW’s Sapphire coast market while distant from either Melbourne or Sydney was bolstered by the Canberra market, which with its family emphasis also changed the activity focus of that region. The question of multiple markets and their different distance decay functions could be very important to our regional short-break destinations.


This paper applies the classic distance decay theory to a tourism situation to see how well it holds up. For non-geographers, the distance decay theory states that interaction between two points will decrease exponentially with the increased distance and costs involved. In terms of travel this relationship is expected to be more complex because part of the ‘fun’ of travel is the journey itself, because the traveller will not face an even distribution of destination attractions, and it may be possible to have a loop or circuit between home and the destination. McKercher examined Victorian (mainly Melbournian) travel along the Princess Highway to Sydney, and found the ‘(distance decay function) is not evident in this empirical study’ (p.219). He notes an overall rise in visits as far as Lakes Entrance and then a plateau of visits through to the Sapphire Coast, before the expected decline started to appear with respect to Sydney. He considers reasons for this is party composition, with those having small children preferring closer destinations like Phillip Island, those with more time available considering more distant destinations, and the effect of through traffic between Melbourne and Sydney requiring periodic stop-overs. He concludes, therefore, that ‘the rate of decay in tourism demand is more complex than a simple function of time and distance’ (p.223).


This paper bemoans the lack of research into regional tourist travels and attempts to remedy the situation with an examination of regional tourist travel on Vancouver Island, through the examination of four conditions. It examines 5,120 self-completed returns in terms of tourists’ distance decay functions and hierarchical travel patterns linked with their points of origin. It compares their actual travel routes with those reported for accuracy of reported behaviour. It compares those differences in terms of islanders and island visitors, and it calculates the visitation probabilities for the various sub-regions on the island. In general it finds support for its various hypotheses, and in terms this project reveals good support for the hierarchical influence of gateways and the operation of a distance decay function, with some notable and explainable distortions.


This comparison of passenger selection criteria between low cost carriers and full service carriers reveals that differences exist between the two types of carrier, but not between continents. The major interest for this project lies in the growing importance of the short-break leisure market to the low cost carriers and how they are extending their brands to capture more of this segment through the development of inclusive packages.


This study relates to a year long survey of passengers flying from a New Zealand regional airport on an international ‘no frills’ airline, mainly to Australia—so the majority of passengers are outbound New Zealanders. It examines various aspects of the operation—the Carrier, the Airport Facilities and Regional Tourism. The carrier’s passengers could be grouped into four clusters: Cluster One (n=688) primarily motivated by price and largely made up of holiday-makers, including a significant VFR element; Cluster 2 (n=285) is a more diverse leisure (sports events and family occasions) and business group—all of whom faced some form of schedule constraint; Cluster 3 (n=282) have the shortest stay and most are flying to attend family events; Cluster 4 (n=266) Opportunistic group taking advantage of low fares. The most important airport facilities were efficient
and friendly check-in staff, followed by clear signs and clean toilets. Restaurants and shopping was of less importance to these passengers. Regional tourism is examined because of the theory that LCC airlines can bring increased visitors to regional areas. This was difficult to prove one way or the other in this study because most of the passengers were locals, but the authors note a change of marketing strategy in 2002 was beginning to turn things around. The new strategy was to bring more Australians into the area by developing packages with local tourism businesses, to take advantage of the Lord of the Rings appeal.


The authors note the issue of personal access to tourism opportunities is not new, but changing government policy is creating new situations in the UK. In 1995 the UK government passed the Disability Discrimination Act, an act that was enacted in stages to become law by October, 2004, and required ‘service providers to make physical adjustments to their premises to cater for the disabled’ (p.170). The tourism industry response was slow and particularly deficient with respect to small businesses and staff training. On-going research at Exeter University has revealed ‘it is too simplistic to view people with disabilities as one coherent market segment’ (p.172), but one consistency across all types is limited disposable income. They conclude if more is to be achieved in this area the tourism industry and government need to design more accessible facilities, improve information and ‘most importantly’ overcome the economic limitations. They note that Europe has a stronger record of ‘social tourism’.


This article examines whether travel time needs to be considered only as a cost when it involves recreation purposes, and that if it can be viewed as a positive part of the trip experience how much value the participants would place on it. The authors have data-mined a small sample of 122 fishing trips in the Colorado mountains and view the value of travel time as a function of the quality of the driving experience en route to a recreation destination. ‘Travel time can be a benefit or a cost, depending on the distance travelled, quality of the scenery, opportunity cost of time, and the like’ (p.20). Points of interest to us include the fact that those travelling 2 – 4 hours one-way are usually on weekend trips for which the length of stay averages 2 days per trip. The marginal value of travel from a positive experience to a negative one on these weekend trips occurs around the 150 mile mark. More people are considering the travel time devoted to sightseeing or pleasure as a benefit rather than a cost, up to a point. That point varies on the length of time away from home.


The short answer provided by this paper is ‘Yes’, unless the charter airlines are vertically integrated into large tour business operations. This is because what we now call low-cost carriers (LCC) offer competitive prices plus greater flexibility regarding timing, destination choices, and customised holiday packages, especially for trips taking 2.5 hours or less. One of the provided examples of the new travel situation is Italy, where LCCs like Ryanair have superseded the old charter flights, in serving the VFR and short-break market.

**Competitive Destination Strategies**


Not able to access.


This paper uses existing tourism data base to determine how well some regional destinations in Southern Italy have adjusted their resources, product mix and marketing to meet changing consumer demand patterns and remain competitive. Their theory is based on the Ritchie and Crouch model’s determinants of destination competitiveness, which identifies the need to constantly reconfigure existing assets to meet the demands of shifting markets. Their analysis of six regional destinations shows the natural and cultural resources represent
only a comparative advantage of tourist destinations (a necessary state, but not sufficient to make a destination competitive). Therefore, destination management of the complementary elements of tourist supply (information and tourist services, cultural events, quality and variety in accommodation and retail, prices and tourist safety) is necessary to maintain or enhance a destination’s competitiveness.


This paper examines the application potential of a web-based ‘analytic hierarchy’ process to determine how tourists compare the importance of various decision-making factors in selecting a destination. The method is based on the psychologists’ paired comparison technique and develops a tree or hierarchical process to compare alternative destinations. The authors promote the technique’s usefulness and provide a rather general illustrative example.


This is a lengthy review of the status of destination competitiveness with the addition of a new model that attempts to introduce a demand element. Authors note that past work has emphasised competitive advantage over comparative advantage, thus downplaying the significance of local sense of place demand characteristics. They cover the Porter, Poon, Heath and the Richie/Crouch contributions and suggest a separate Demand Conditions (awareness, perception and preferences) need to be added. They then go on to identify a long list of ‘indicators’ for each of their Destination Competitiveness boxes, which can guide destinations in their own assessments. They conclude that even if such a process is undertaken successfully it still has the weakness of being tourism focused and thereby underplaying the socio-economic prosperity of the community. To overcome that weakness they recommend adding a quality of life assessment to ensure the broadest involvement of all concerned.


Building on their previous model of destination competitiveness these authors examine the relevance of identified indicators to Australia’s position in the Asia-Pacific tourism market. They ask an industry based sample to compare Australia’s competitive position with respect to nine national competitors, using the six model categories of ‘core resources’, ‘destination management’, ‘demand conditions’, ‘supporting conditions’, ‘situational conditions’, and ‘destination competitiveness’. Using simple descriptive statistics they create bar charts of each category to determine the relative position of each contributing variable for the ten countries. So, for example they find that in terms of ‘destination management’ ‘Australia is regarded as above average, compared to the other countries in the reference set, in all attributes (variables) on this dimension’. It is a simple way to compare international competitiveness, though the authors do warn it is subjective because of the Australian sample perspective.


This paper uses the same data set and idea of the above paper, except it now includes the opinions of a Korean industry sample, and after combining this data with the Australian set undertakes an exploratory factor analysis to draw out the main dimensions ‘objectively’ and to test them against the model’s structure. The analysis produces a twelve factor solution out of the 83 competitiveness indicators, which explains 66.7% of the variance. Factor 1 is ‘Destination Management’, where respondents combined public and private contributions. Factors 2 ‘Nature-Based Resources’ and 3 ‘Heritage Resources’ could be equated with ‘core resources’, while Factor 7 ‘Government Commitment’ could be equated with ‘supporting conditions’; but there were some sample initiated dimensions, such as ‘E-Business’. Overall the paper confirmed the validity of the model and confirms the authors’ earlier point that local variations should be expected.

Short-Break Holidays—A Competitive Destination Strategy

Short breaks for this study refer to ‘hotel packages of one to three nights, which for a single price together with accommodation include one or more of the following: meals, transport, entertainment, or a program of activities’ (p.21). The authors conducted a portfolio analysis of Scotland’s structure (market scope, company size, sources of advantage) and the strategy (predator or defender role in relation to distribution, packaging, promotion, pricing and differentiation) of the 30 largest hotel companies operating in Scotland in 1991. Some of their more relevant findings include: the wider the packaging scope the more revenue is generated; companies adopting a packaging strategy tend to have more sources of competitive advantage and achieve higher performance; high market share companies adopt promotional strategies akin to branding. In general they conclude that ‘packaging strategies would appear to be available to any size company operating in a market with medium to wide scope, (with) performance improving with sources of advantage’ (p.25).


This paper examines in a conceptual manner various management strategies to maximise revenue yield in hotels by taking advantage of the short-break market. ‘The (short-break) market has evolved from the off-peak weekend break to a market in its own right and as such, has generated further interest and recognition’ (p.55). The paper recommends moving beyond the pricing structure of yield management to examine the concept of competitive advantage. Potential strategies can be ‘Defender’—through pricing, differentiation and distribution, or ‘Predator’—through segmentation and packaging, and promotion. Edgar also notes that other research has ‘highlighted that individual segments appear to provide differing yields in supplementary spend which may influence overall hotel performance’ (p.58).


This chapter reviews the rise of the short-break holiday market in Scotland and examines it in terms of the existing hotel market structure, competitive advantage and actual performance. Focusing on the competitive advantage angle, we find the interesting operational definition of ‘competitive advantage coming from creating value for buyers that exceeds the costs of generating it’ (Hergert and Morris, 1989) on p. 388. The need to segment and package in order to produce Porter’s focus dimension is emphasised, along with reference to Porter’s value chain analysis.


This paper attempts to operationalise the Ritchie and Crouch model of destination competitiveness, using Hong Kong and the IPA Grid approach as a test case. The sample was tourism practitioners in H.K. They ranked its prime five attractors as (safety, cuisine, dedicated tourism attractions, visual appeal, well-known landmarks), its five major competitors as (Singapore, Bangkok, Tokyo, Shanghai and Beijing) and its top five business-related factors as (political stability, international access, internal transport facilities, ‘free port’ status and government policy). All of these factors and more were placed in an importance-performance grid analysis. Quadrant 1 (most important and best performance) showed that H.K. rated well versus the competition for cuisine and safety, international access and good internal transport facilities, its political stability, cleanliness and transparency of policy making. Hence it is recommended it emphasise those points and attempt to upgrade a few others. The IPA is a relatively simple technique, and could be a viable competitive analysis for many Australian destinations.


This is a rather general and descriptive paper that translates Porter’s competitive advantage theory into tourism examples. To achieve Porter’s focus goal we are encouraged to segment our market and to target those groups which will bring the highest yield. Other gems include ‘there is the growing evidence that quality tourism products will dominate the marketplace and force many destinations to examine whether they truly offer an acceptable product’ (p.44); Many tourism destinations will have to scale back their plans in order to focus on the needs of specific consumer segments, or specialise in a certain form of tourism product’ (p.45).
Short-Break Holidays—A Competitive Destination Strategy


This study examined South Australia’s competitive position within Australia for international and domestic visitors. Using content analysis of South Australia’s official publications they identify eight core attractions (wine tourism, Adelaide, festivals and events, heritage tourism, the Murray River, nature-based tourism, the Outback and coastal S.A.). These ‘differentiators’ are then examined using the views of travel agents comparing S.A. to the other states and territories. This reveals S.A.’s relative competitive position is weak, with only wine tourism and the Murray registering 25% or more recognition by the travel agents. They conclude that this is an exploratory study and while using travel agents as indicative gatekeepers was justified it would be better to conduct ‘a large-scale consumer survey’ (p.137); which is precisely what we intend to do in this project.


This paper uses the integrated competitive destination model developed by Dwyer, Livaic and Mellor (2003) to establish the competitiveness of Slovenia’s tourism and to compare it with an earlier study using the De Keyser-Vanhove model. The 127 respondents were tourism stakeholders/experts who assessed 1) inherited resources, 2) created resources, 3) supporting factors, 4) destination management, 5) situational conditions, and 6) demand conditions within Slovenia and nearby competitor states. They conclude that Slovenia is competitive in its resources but less so in its destination management. The authors note ‘A competitive advantage can only be created by improved responsiveness to customer needs and preferences, innovativeness, service quality and price and the so-called non-price factors’ (p.301 – 02), but once again there was no examination of consumer opinion. They also note ‘Researchers argue that no universal and optimal competitiveness model exists for every destination’ (p.302). The paper and approach taken are very clear, and they include a copy of the questionnaire, which is most useful.


This paper attempts to operationalise the Ritchie and Crouch model on destination competitiveness, using ten western ski resorts and three eastern ski resorts in Canada. The authors developed 50 questions to measure aspects of the model and interviewed ten stakeholders in each resort. The results indicated the three top Canadian ski resorts in 2001 – 02 were Whistler with a cumulative scale score of 248, followed by Tremblant (247) and Blue Mountain (240) out of a possible total of 300. The authors acknowledge the difficulty they had measuring some of the model’s concepts and the lack of consumer inputs into this particular study; but are confident that with further refinement the model can become a significant management tool.


This is an early and elementary examination of the issue of competitive destinations and competitive analysis. Competitors should be viewed as part of the ‘external environment’, and this applies to tourism as well as other areas of commerce—’for tourists have a range of potential destinations from which to choose’ (p.17). Pearce identifies three approaches to competitive analysis—comparative case studies, element-by-element comparisons, and quantitative and graphical analyses. He chooses to use the first in his assessment of Sarawak’s competitive position within East Asia. He looks at features such as markets, access, attractions, accommodation, prices and development processes—all through the eyes of an external professional observer.


The authors have attempted to develop a comprehensive model of destination competitiveness that contains five key determinants: destination policy, planning and development, destination management, core resources and attractors, supporting factors and resources. Within each of these determinants they identify key variables that need to be measured and included into the overall assessment exercise. They point out that the individual destination’s competitiveness will also be affected by its surrounding environment and its internal competitive micro-environment. The authors have structured the model in the form of a performance audit, and to facilitate
its utility provide two groups of measurement—‘subjective’ consumer measures and ‘objective’ industry measures. However, they stress that ‘models are not perfect and therefore should not be used in a cookbook fashion’ (p.60). As we have seen in the other references of this section this model has been applied in a variety of settings with mixed but generally positive results.

Industry Planning and Policies


All destinations need to develop positioning strategies that help prospective visitors to establish a ‘mental fix’ on them within the crowded and competitive tourism marketplace. This paper examines whether the traditional business management techniques that usually relate to a single product can be used in destinations with multiple products and experiential services. Utilising a small survey of English regional tourist boards the author examines what has helped them to position/differentiate their destination product. He notes most conducted regular surveys to understand their customers, just over 50% of whom revealed they made their destination choice based on travel brochure information. Such information was generally presented using a pluralistic marketing approach to satisfy a range of businesses and potential visitors. The paper recommends that markets be reappraised on a regular basis, such surveys should identify relevant consumer psychographic components, undertake a realistic strengths and weakness assessment of the destination and develop products for the desired market segments, and promote these links through a more focused marketing mix. The paper points out that ‘any repositioning process will require change, particularly in the culture of the organisation and management attitudes’ (p.66).


This is a review of the destination marketing literature, which ends with a list of ‘critical success factors’. There are 33 critical success factors so identified, that have been grouped into four sequential steps 1) Strategic orientation, 2) Destination identity and image, 3) Stakeholder involvement, 4) Implementation, monitoring and review. It makes a useful reference for this project and the check-list could be shared with practitioners.


The authors offer a 15 Challenges framework to conceptualise the key issues and challenges facing tourist destinations, and use Edinburgh and London to illustrate these points. They emphasise ‘The one consistent finding—and the one that perhaps best encapsulates those 15 challenges identified in the proposed framework—is the issue of collaboration and the need for those within the destination to work together in solving problems’ (p.51). The paper outlines how London responded to the 2005 terrorist bombings by 1) reducing its dependency on any single market, 2) developing markets that will promote diverse and dispersed tourism business, 3) increasing tourist appeal while managing the costs of tourism, and 4) developing London’s role as the principal ‘gateway’ to the UK.


This is an interesting paper that may be of some interest when considering package recommendations. It examines the different types of packaging as forms of price bundling; these range from ‘escorted tours’ to ‘independent packages’. The paper notes that ‘theoretical and empirical analyses of packaging strategies and (their effects) on consumer demand for travel have not progressed far’ (p.76); yet feels there is a future for this type of strategy given anecdotal evidence of its growth and myriad forms. Perhaps more destinations will consider this option if the global recession lingers.


This exploratory paper (sample of 6 key bid organisers) examines what these people consider to be the key success criteria in the bidding process. In addition to the ‘conventional’ criteria of political -, economic -, media -, infrastructure -, technical -, and socio-cultural factors the paper identifies ‘new primary criteria’ of building
relationships, building brand equity, commitment, guaranteed added value, legacy, bidding experiences, bid team composition, and creative statistics. Although many academics are sceptical about many hallmark event claims, learning how these teams put together a destination bid could provide some useful lines of enquiry, if any destinations were to pursue the sports option for their short-break market.


The paper maintains that the careful selection of a target market and its use to differentiate a destination can assist in its development goals, and illustrates these points with respect to rural tourism destinations in North Portugal. In that location 46% of the respondents came for a short-break (up to four days) holiday. A cluster analysis identified four groupings—‘Urbans’, ‘Calm rural enthusiasts’, ‘Active rural enthusiasts’, and ‘Purists’. Traditional marketing analysis suggests ‘Calm Rurals’ are an attractive market, being the biggest group with the highest expenditure levels and likely to grow. But this type of analysis can be enhanced through the examination of other features such as ‘destination fit’ which considers the link with long-run objectives, existing and potential resources, and competitive market position. Through the use of additional benefit analysis and environmental sustainability analysis, the economic significance of the ‘Calm Rurals’ was confirmed; so this niche market was recommended for this region. It is felt that ‘management of this demand’ should be based on a careful selection of the target market, to consider its overall attractiveness and destination fit.


This is a dated and industry-related paper, but with some useful data and quotes. For example, based on a 1985 survey an estimated 33 million short-break holidays were undertaken in the UK. Visits to friends and relatives were the most popular accommodation category, with hotels accounting for 17% of the market. Demand for short-break holidays has become consistent throughout the year and short-break operators focus on the domestic market. According to the authors, ‘As the marketplace is evolving, there is a need to develop and sustain retailer brand awareness and uncover changes in consumer expectations and demand patterns’ (p.22); plus ‘The most important aspect of (marketing) involves increasing awareness of attractions in and around hotel locations’ (p.23).


This press release announces the new campaign to encourage Australians to use their accumulated recreation and long service leave to achieve a better balance in their lives, and in the process produce some additional demand for domestic tourism. It claims that ‘Australian employees have accumulated a massive 123 million days of annual leave which is equal to $33 billion in wages … If we can unlock some of this leave and get people to use it to holiday in Australia it would be of great benefit to our $65 billion domestic tourism industry’. Tourism Australia offers an ‘industry toolkit’, a ‘tactical offers magazine’ (where destinations and businesses can join Tourism Australia in a campaign designed to encourage this market), plus some ‘co-operative partnerships). The arrival of this campaign was foreseen by STCRC and mentioned in their call for EOIs, so they obviously hope we can examine the potential synergies between No Leave, No Life and the further development of Australia’s short-break holiday potential.

- Tourism Australia Newsletter, 26 June 2009: news@info.australia.com (DR).

This electronic newsletter, accessed on June 28, presents a little more background on the current No Leave, No Life campaign. It calls the advertisement insert a magazine, and claims 750,000 copies were inserted into The Australian, The Sydney Morning Herald and The Melbourne Age (presumably a combined total), along with an ‘ezine’ version on the Internet. There is to be another edition in September, and they are designed to increase domestic travel through promotional leverage with the federal government.
Tourism Australia Newsletter, 31 July 2009: news@info.australia.com (DR).

This issue of the newsletter has a section entitled ‘Domestic Marketing Industry Prospectus 2009/10’ which provides an update on the No Leave, No Life campaign and claims it will be a long-term campaign ‘continuing through 2009/10 and beyond’ (p.1). It states the ‘Tactical Offers Magazine Issue One’ had 87 industry partners advertising within it and that the associated website had 28,000 ‘unique visitors’ in June, an increase of 150% over May. Associated with the No Leave, No Life campaign is another one designed to ‘raise the emotional appeal of an Aussie holiday amongst Australians’ (p.1), and this campaign will reach the public via ‘My Australia Magazines’ starting in November.

Tourism Australia Newsletter, 9 December, 2009: news@info.australia.com (DR).

This issue includes a section on the expansion of the No Leave, No Life campaign to the nation’s TV screens on Saturday night December 5, in the 6:30 to 7:00 pm time slot. The new No Leave, No Life television series started on Channel Seven and received 1.3 million viewers on its first night. It is hosted by Ernie Dingo and will run seven weeks. A well-timed piece of marketing with the major upcoming holiday period, but one that is likely to be dominated by the traditional 2 – 3 week family vacation.


This press release provides the details on the 2009 household stimulus packages. ‘Around 8.8 million (just under 80% of) families and singles are expected to receive payments under the household stimulus package’ (p.1). ‘The Tax Bonus for Working Australians will be paid as a lump sum of up to $900 (depending on income level in the preceding tax year) and will be paid to eligible taxpayers from April 2009’ (p.2). As such its distribution was complete or near complete by the time our national survey was conducted in August/September 2009.


This is an independent quarterly survey of Australia’s tourism industry, its record and opinions. It has been included because it covers the period when we were conducting our consumer focus groups, and this report reflects the contrasting general opinion of the tourism industry. The issue reports a ‘severe lack of confidence in the tourism industry for the upcoming October to December Quarter’. Of particular relevance to the short-break market are the following statements:

‘The overall sentiment is one of great vulnerability given the discretionary nature of tourism spending and concerns that the industry will suffer from the global economic slowdown’ (p.10);

‘Nevertheless, there is a recognition of competing forces being exerted on the industry, and not all of these forces are negative’ (p.10);

‘Concerns are also apparent beyond the immediate financial crisis, particularly surrounding the competitiveness of Australia compared to Asian neighbours’ (p.10).

The poorest rating of tourism industry characteristics was given to the ‘calendar of tourism events’, which 21% of participants rated as poor or very poor. Since short-break holidays are often built around special events this would indicate an area of concern for short-break holiday destinations.


This is a dated regional guide for short-break travel out of Melbourne. It emphasises the wine, food and cultural links within surrounding ‘jigsaw’ tourist regions and tries to tempt Melbournians to leave the metropolis for a few days and enjoy these features of regional living. The guide provides a distance indicator: 95 kms to the closest region of the Mornington Peninsula and 272 kms to the furthest of Rutherglen, There is no definition of a ‘short-break holiday’, but the shortest car hire quotes are for 1 – 6 days. The guide consists primarily of regional maps with indicators leading to specific adverts. There is also a calendar of events (festivals, etc.) within each region.
Short-Break Holidays—A Competitive Destination Strategy


This lobby group distributed the above press release on March 13, 2009. It was full of general global assessments and predictions, except for the following observation. ‘In developed countries, the increasing priority given to leisure activities can be expected to enhance demand for travel to existing and new tourism destinations once consumers regain confidence, while the popularity of short breaks—both domestic and international—will continue to expand in the medium to longer term’ (p.2). This should provide a useful quote in some circumstances.
APPENDIX B: FOCUS GROUP QUESTIONS SCHEDULE

Preliminary Questions
(Presented to participants on a clean/unidentified sheet, while everyone is getting settled)

Established Short-Break Holiday-Makers
a) How would you define/describe a short-break holiday?
b) When did you last go on a short-break holiday?
c) How many nights were you away from home?
d) Where did you go?
e) What were your main activities? Please rank the top three.

Intending Short-Break Holiday-Makers
a) How would you define/describe a short-break holiday?
b) Where are you planning to go on your intended short-break holiday?
c) How many nights will you be away from home?
d) What will be your main activities? Please rank the top three.

General Conversation Questions

1. What encourages you to think about going on a short-break holiday?
2. What are your main alternatives (time- and cost-wise) to a short-break holiday?
3. Was there any incentive scheme or marketing campaign that convinced you to make the trip?
4. Has the arrival of budget airline travel encouraged you to take more short-break holidays?
5. How are recent fuel price increases affecting your holiday choices?
6. Which media type do you rely on most to help your short-break holiday decision-making?

Specific Regional Questions

1. What are your favourite short-break destinations within this country and state, and why?
2. Do you have a seasonal preference as to when you go on these short-break holidays?
3. OTHERS—To be determined at the regional level.

THANK YOU FOR YOUR HELP AND FRANKNESS IN TODAY’S DISCUSSION.
APPENDIX C: INDUSTRY INTERVIEW SCHEDULE

Local/State Record

1. How would you define the short-break holiday?

2. How well has your state/local destination performed over the past five years with respect to the short-break market?

3. What is your state/destination’s strategic positioning with respect to this market?

4. Have you developed any specific promotions (including branding and image) and communication strategies for this market? If so, how have they fared over the past five years.

5. Have you developed any specific product development, service delivery or incentive programs for this market? If so, how have they fared over the past five years?

6. How does your organisation utilise online resources (e.g. web pages, booking systems)?

Market Trends

1. What changes in the short-break market have you witnessed over the past five years?

2. How has the arrival of budget airlines influenced your short-break market?

3. How has the recent rise in fuel prices affected your short-break market?

4. What do you see as the prime constraints to further development of the short-break market in Australia?

5. What changes do you anticipate seeing in your state/local short-break market?

Future Strategies

1. Who do you think will make up the bulk of the short-break market in the future?

2. Are the needs of this group or these groups being met currently?

3. If you were the federal Minister of Tourism what would you be doing about the short-break market? What level of priority would you give to it?

4. If you were the state/territory Minister of Tourism what would you be doing about the short-break market? What level of priority would you give it?

5. Are there any aspects of the short-break market that have not been covered that you would like to bring to our attention?

THANK YOU FOR YOUR TIME AND FRANKNESS ABOUT THIS TOPIC.

Make sure you record:
Name of respondent ________________________________
Organisation ______________________________________
Date of Interview __________________________________
APPENDIX D: SHORT-BREAK HOLIDAY NATIONAL TELEPHONE SURVEY

Introduction

Good morning/afternoon/evening. My name is <INTERVIEWER NAME> from NWC Opinion Research. We are doing a national study about travel and short-break holidays on behalf of Sustainable Tourism Cooperative Research Centre and La Trobe University.

The aim of the survey is to ask you about any recent travel you’ve done. We need to speak with people who haven’t travelled, as well as those who have. The results will be used by the University to assist with policy and planning for our tourism industry.

If you would like to participate in this study, the following questionnaire will take up to 14 minutes of your time.

Select appropriate menu code to proceed.

(For this survey, we need to speak to the person who:
• Is a usual resident of the household, and has been a resident at that address for the last 3 months
• Is aged 18 or more
• And had the last birthday)

It’s very important we find out the travel patterns of a broad range of people for this survey, so that we get no bias in our results, and the best way for us to do this is to randomly select people by using birthdays.

What month was your birthday in?

Has anyone living there had a birthday since yours?

Are they (last birthday person) aged 18 years or more and a usual resident of the household?

Could I please speak with this person?

If person had last birthday proceed, otherwise ask to speak with last birthday person.

If last birthday person unavailable schedule call back or if appropriate do third party interview if person who answered phone willing and confident can answer questions on behalf of last birthday person.

Select appropriate menu code to proceed.

RECORD TIME NOW: ____________

As this is market research, it is carried out in compliance with the Privacy Act and the information provided will be kept confidential and only used for research purposes.

IF NECESSARY: Our company’s credentials can be verified by contacting the Market Research Society of Australia’s Surveyline on 1300 364 830.

My supervisor may be monitoring this interview for quality control purposes. If you do not wish this to occur, please let me know.

1 OK to monitor
2 Do not monitor
Could you please tell me which age group you are in.

18 – 19 years .......................................... 1
20 – 24 years .......................................... 2
25 – 29 years .......................................... 3
30 – 34 years .......................................... 4
35 – 39 years .......................................... 5
40 – 44 years .......................................... 6
45 – 49 years .......................................... 7
50 – 54 years .......................................... 8
55 – 59 years .......................................... 9
60 – 64 years .......................................... 10
65 – 69 years .......................................... 11
70 – 74 years .......................................... 12
75 – 79 years .......................................... 13
80 + years............................................... 14

F.4 RECORD SEX

Male ....................................................... 1
Female.................................................... 2

A) SHORT-BREAK HOLIDAY EXPERIENCES

Firstly, we would like to talk to you about Short Break Holidays. By that we mean a trip of 1 to 4 nights away for leisure or holiday purposes here in Australia. We do not mean day-trips or trips mainly for business/work or trips away for 5 nights or more.

A1a When was the last time you went on a Short-Break Holiday (Leisure oriented trip of 1 – 4 nights) here in Australia? READ OUT

Within the last 6 months ...................................................................................................... .1
Within the last 7 – 12 months ...............................................................................................2
Over a year ago but within past two years............................................................................3
Over two years ago but within past three years ....................................................................4
More than three years ago..................................................................................................... 5
Never (DO NOT READ OUT).............................................................................................97
Don’t Know (DO NOT READ OUT)...................................................................................99

IF WITHIN PAST 3 YEARS (CODES 1 – 4) CONTINUE. OTHERS GO TO SECTION B

A1b How many times have you taken a short-break holiday in Australia in the past 3 years? ENTER NUMBER

IF NECESSARY: If unsure, your best guess will do

RECORD NUMBER of trips: _____

I’d now like to ask you about the last short-break holiday you took in Australia.

A3 How many nights were you away from home on that trip? CHECK: ONLY ACCEPT 1 – 4. IF MORE OR LESS MENTIONED SAY WE ARE INTERESTED IN TRIPS OF 1 – 4 NIGHTS DURATION.

Number of nights ....................................... <RECORD NUMBER>

IF ONLY ONE NIGHT ➔ A5
ELSE ➔ CONTINUE

A4 Did you stay in the one destination for all <…> nights?

Yes .............................................................. 1
No.............................................................. 2
A5 What were the three main purposes of your last short-break holiday? SELECT UP TO 3 REASONS IN RANKED ORDER

Visiting friends (including weddings etc. involving friends).................................1
Visiting relatives (including family weddings etc.).................................................2
Holidays / leisure / relaxation / getting away...........................................................3
Entertainment / attending special event e.g. festival, performance.........................5
Sport—participation...............................................................................................6
Sport—spectating.................................................................................................7
Shopping ..............................................................................................................8
Work (as driver / transport crew)..........................................................................9
Business / other work.........................................................................................10
Conferences / exhibitions / conventions / trade-fairs.............................................11
Training and research (employed—not student)....................................................12
Education (mostly students)..................................................................................13
Employment / leisure (e.g. working holiday).........................................................14
In transit (passing through) / stopover.................................................................15
Personal appointment / business (excluding health).............................................16
Health-related......................................................................................................17
Providing transport..............................................................................................18
Accompanying someone who attended a Convention / conference / seminar / trade fair / exhibitions .................................................................19
Incentive reward provided by business employer..................................................20
Other, SPECIFY..................................................................................................96
No other reason...................................................................................................97
Don’t know .........................................................................................................99

A6 What mode of transport did you use to travel to your destination…? INTERVIEWER NOTE—IF MULTIPLE MODES USED, WHICH ONE WAS USED TO TRAVEL THE LONGEST DISTANCE

Private/own vehicle (car, truck, motorbike) / company car ..................................1
Rented / hire vehicle ............................................................................................2
Air transport.........................................................................................................3
Railway...............................................................................................................4
Bus/coach...........................................................................................................5
Passenger lines and ferries ..................................................................................6
Camper van / motor home..................................................................................7
Other transport, SPECIFY..................................................................................96

A7 What was the main type of accommodation that you used in your destination…?

Luxury hotel / luxury resort (4 or 5 star)................................................................1
Standard hotel / motel / motor inn(below 4 star)....................................................2
Serviced apartment.............................................................................................3
Rented house / apartment / unit / holiday flat (not serviced on a daily basis)...........4
Backpacker / visitor hostel..................................................................................5
Friends or relatives property (no payment required)............................................6
Own property (e.g. holiday house)......................................................................7
Privately owned boat / Yacht etc (i.e. owned by them or a friend).........................8
Guest house / Bed and Breakfast.......................................................................9
Home stay..........................................................................................................10
Commercial boat, houseboat, cabin cruiser or cruise ship....................................11
Slept in bus / coach / train / plane.......................................................................12
Other non-commercial property (e.g. time share, club lodge, company unit, nurses quarters)..............................................................13
Hospital or hospital related accommodation (e.g. patients, relatives)....................14
Educational institution (e.g. uni)..........................................................................15
Caravan park, staying in a caravan (and TRAVELLING WITH a caravan).............16
Caravan park, staying in a caravan (but NOT TRAVELLING WITH a caravan)......19
Caravan park, camping......................................................................................18
What (leisure activities) did you do while you were on this short-break holiday? PROBE FOR THE FIVE MAIN CATEGORIES AND THEN LIKELY ACTIVITIES GIVEN PURPOSE AND PLACE.

IF VISITING FRIENDS RELATIVES (CODES 1 – 2 AT A5) ASK:

A8a  And which, if any, of those activities were suggested by the family or friends you visited?

A8b  And which, if any, of those activities did you undertake with the family or friends you visited?
## Short-Break Holidays—A Competitive Destination Strategy

<table>
<thead>
<tr>
<th>Outdoor or nature activities</th>
<th>Sports or active outdoor activities</th>
<th>Arts, heritage or festival activities</th>
<th>Local attractions or tourist activities</th>
<th>Anything else, such as social activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. go to the beach (incl. swimming)</td>
<td>37. go scuba diving</td>
<td>12. attend theatre, concerts or other performing arts</td>
<td>19. visit amusements / theme parks</td>
<td>25. visit friends and relatives</td>
</tr>
<tr>
<td>2. visit national parks / state parks</td>
<td>41. go snorkelling</td>
<td>13. visit museums or art galleries</td>
<td>20. visit wildlife parks / zoos / aquariums</td>
<td>26. (eat out / restaurants)</td>
</tr>
<tr>
<td>36. go bushwalking, or on rainforest walks</td>
<td>45. go surfing</td>
<td>14. visit art / craft workshops / studios</td>
<td>21. go on guided tours or excursions</td>
<td>27. (movies / videos— NOT at cinema)</td>
</tr>
<tr>
<td>3. visit botanical or other public gardens</td>
<td>46. do any water activities / sports (e.g. sailing, windsurfing, kayaking, water skiing, white water rafting etc)</td>
<td>15. attend festivals / fairs or cultural events</td>
<td>38. go to markets (street / weekend / art / craft markets)</td>
<td>28. go to pubs, clubs, discos etc</td>
</tr>
<tr>
<td>4. go whale / dolphin watching (in the ocean)</td>
<td>7. go fishing</td>
<td>16. experience aboriginal art / craft and cultural displays</td>
<td>22. go on tourist trains</td>
<td>29. visit casinos</td>
</tr>
<tr>
<td>6. visit farms</td>
<td>8. play golf</td>
<td>17. visit an aboriginal site / community</td>
<td>23. visit industrial tourism attractions (eg breweries, mines)</td>
<td>30. attend an organised sporting event</td>
</tr>
<tr>
<td>40. visit the reef</td>
<td>9. play other sports</td>
<td>18. visit history / heritage buildings, sites or monuments</td>
<td>24. visit wineries</td>
<td>31. (go shopping (pleasure))</td>
</tr>
<tr>
<td></td>
<td>10. do any other outdoor activities (e.g. horse riding, rock climbing, bungee jumping, four wheel driving, reef walking etc)</td>
<td>19. visit an aboriginal site / community</td>
<td>42. visit a health spa or sanctuary / well-being centre</td>
<td>32. (just walk or drive around / taking in the sights / general sightseeing)</td>
</tr>
<tr>
<td></td>
<td>11. (exercise / gym / swimming at a local pool or river or creek)</td>
<td>18. visit history / heritage buildings, sites or monuments</td>
<td>43 visit or stay on an island</td>
<td>33. go on a day trip to another place</td>
</tr>
<tr>
<td></td>
<td>47. go cycling</td>
<td>19. visit amusements / theme parks</td>
<td>44. go snow skiing</td>
<td>34. (go on picnics / BBQ’s)</td>
</tr>
<tr>
<td></td>
<td>44. go snow skiing</td>
<td>20. visit wildlife parks / zoos / aquariums</td>
<td>45. go surfing</td>
<td>48. attend movies / cinema</td>
</tr>
<tr>
<td></td>
<td></td>
<td>21. go on guided tours or excursions</td>
<td>46. do any water activities / sports (e.g. sailing, windsurfing, kayaking, water skiing, white water rafting etc)</td>
<td>71. read a book</td>
</tr>
<tr>
<td></td>
<td></td>
<td>38. go to markets (street / weekend / art / craft markets)</td>
<td>22. go on tourist trains</td>
<td>72. watch TV</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22. go on tourist trains</td>
<td>23. visit industrial tourism attractions (eg breweries, mines)</td>
<td>73. rest &amp; relaxation (unspec)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>24. visit wineries</td>
<td>42. visit a health spa or sanctuary / well-being centre</td>
<td>96. Other activities (SPECIFY)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>43 visit or stay on an island</td>
<td>44. go snow skiing</td>
<td>97. None of these</td>
</tr>
</tbody>
</table>
A9 I’d now like to ask you about your travel party on that last short-break holiday, that is, all persons with whom you directly travelled and shared most expenses. How would you describe your travel party?

PROBE TO GET BEST FITTING CATEGORY.

- Travelling alone ....................................................................................................................1
- Adult couple (in relationship sense)........................................................................................2
- Family group—parents and children....................................................................................3
- Friends or relatives travelling together—with children........................................................4
- Friends or relatives travelling together—without children ...................................................5
- Business associates travelling together—with spouse ..........................................................6
- Business associates travelling together—without spouse .....................................................7
- School, uni, college group (including sporting).....................................................................8
- (Non-school) Sporting group / community group or club.....................................................9
- Other, SPECIFY ......................................................................................................................96

I now have a question about your expenditure on this trip. I want you to include anything you physically paid for, whether by cash, EFTPOS, cheque, credit card or any other means. If you paid for other people at any stage, for example if you took someone else out for dinner, then do include that. But if someone else paid for you, then exclude that.

A10 So with that in mind what is your best estimate of the TOTAL expenditure for your last short-break holiday (including travel, accommodation, food, drink, spending money etc)?

$ .........................................................................................................................................

B) SHORT-BREAK HOLIDAY INTEREST

ASK ALL WHO DID NOT GO ON SHORT BREAK HOLIDAY IN PAST 3 YEARS (CODES 5 – 7 AT A1a)

B1 Have you taken any holiday trips in the past 3 years?

Yes CONTINUE
No SKIP TO B2

B1a Which types of trips have you taken in the past 3 years?

MULTIPLE RESPONSE

- Day trips ................................................................................................................................1
- Short trips of 5 – 6 days away ...............................................................................................2
- Regular Annual holidays (1 – 3 weeks duration) .................................................................3
- Longer trips away of over 3 weeks .......................................................................................4
- International short-break holidays of 1 – 4 nights ............................................................5
- No holidays taken in past 3 years (DO NOT READ OUT)................................................97
- Don’t Know (DO NOT READ OUT) ...................................................................................99

ASK ALL WHO DID NOT GO ON SHORT BREAK HOLIDAY IN PAST 3 YEARS (CODES 5 – 7 AT A1a)

B2 Why have you not taken a short-break holiday of 1 – 4 nights away in Australia over the past three years? DO NOT READ OUT

- Not enough money ..............................................................................................................1
- Spent spare money on other things ....................................................................................2
- Not enough time ..................................................................................................................3
- Difficult to get away (children, pets, business) ....................................................................4
- No interest ..........................................................................................................................5
- Absence from work may reflect poorly on my work commitment ....................................6
- Prefer longer holidays .......................................................................................................7
- Unable to get away due to disability/illness .......................................................................8
Short-Break Holidays—A Competitive Destination Strategy

Unaware of opportunities.................................................................9
Just never got around to organising a short-break holiday..........................10
Prefer to take short-break holidays overseas rather than within Australia...........................11
No particular reason ........................................................................97
Other (please specify) .........................................................................96
Don’t Know ........................................................................................99

ASK ALL

B3a Have you been working and entitled to annual or recreation leave at any stage over the past 3 years?

Yes ........................................................................................................1
No.............................................................................................................2
Don’t Know ............................................................................................99

IF YES CONTINUE. OTHERS GO TO B4

B3b Apart from any holidays or trips you may have taken within Australia, how have you used your available annual leave or recreation leave over the past three years? DO NOT READ OUT

Have not taken any of my annual leave at all/have been building up my days ..........1
Stayed at home relaxing .........................................................................2
Worked on home e.g. DIY .......................................................................3
Studied ......................................................................................................4
Got some of my leave paid out ..................................................................5
Used it to do voluntary work/Assisted others less fortunate .........................6
Used it to recover from illness ..................................................................7
Used it to look after family members ..........................................................8
Used leave to travel internationally ............................................................9
No other reason—have always used leave for holidays/trips ...............................10
Other (please specify) .............................................................................96
Don’t know ..............................................................................................99

ASK ALL

B4 Are you aware of any advertising or promotional campaigns designed to encourage you to think about Short-Break Holidays?

Yes ........................................................................................................1
No.............................................................................................................2
Don’t Know ............................................................................................3

IF YES AT B4

B4a And do you remember what the promotional campaign message was about?

Please specify_________________________________________ 

C) MOTIVATION FOR SHORT-BREAK HOLIDAYS FOR ALL RESPONDENTS

ASK ALL

Thinking in general about potential short-break holiday opportunities and the types of Short-Break Holidays that would appeal to people like you:

C1. I’m going to read out a list of reasons why people decide to take short-break holidays and I’d like you to tell me the top reason in each category that would encourage you to take a Short-Break Holiday. 

C1a Firstly, Which of these factors would motivate you the most to take a Short-break holiday?

SINGLE RESPONSE
- Leave/Recreation entitlement ................................................................. 1
- Stress .................................................................................................................. 2
- Something new and exciting ................................................................. 3
- Getting away from it all ............................................................................... 4
- Change of scene .................................................................................................. 5
- Change of weather ......................................................................................... 6
- Other (please specify) .................................................................................... 96

C1b When deciding on the place to take a short-break holiday, which of these factors is the most important to you?

SINGLE RESPONSE
- Coastal attractions ................................................................................................. 1
- Capital city attractions ....................................................................................... 2
- Mountain attractions ............................................................................................ 3
- Regional attractions .............................................................................................. 4
- I just like the people in that location ................................................................. 5
- Good weather ......................................................................................................... 6
- Plenty to see & do ................................................................................................... 7
- Not too touristy ...................................................................................................... 8
- To help retain traditions and heritage ............................................................... 9
- Other (please specify) ....................................................................................... 96

C1c Which of these activities or attractions is the most important to you when deciding where to take a short-break holiday?

SINGLE RESPONSE
- Shopping ............................................................................................................. 1
- Nightlife ............................................................................................................. 2
- Sport .................................................................................................................. 3
- Festivals and events ............................................................................................ 4
- Museums ............................................................................................................. 5
- Galleries ............................................................................................................. 6
- Restaurants ....................................................................................................... 7
- Wineries ............................................................................................................. 8
- Support local crafts and business ................................................................... 9
- Other (please specify) .................................................................................. 96

C1d Which of these factors is the most important to you when deciding where to take a short-break holiday?

SINGLE RESPONSE
- Visit friends and relatives ............................................................................. 1
- Look up famous people and events ............................................................... 2
- (Current or past) ............................................................................................... 3
- Attend club events ............................................................................................ 3
- Attend tournaments .......................................................................................... 4
- Demonstrate support for hard hit regions ..................................................... 5
- Learn about different cultures ......................................................................... 6
- Other (please specify) ................................................................................... 96

C1e Overall, thinking of all the factors that you have just mentioned, that is, <<READ OUT FACTORS FROM C1a – d>> what is the most important factor for you when deciding to take a short-break holiday?

C2 Thinking about reasons why you would take a short-break holiday in Australia, which of the following would be your three most important considerations when choosing a destination? READ OUT FULL LIST BEFORE ACCEPTING ANSWER.
SELECT UP TO 3 REASONS IN RANKED ORDER

Value for money ............................................................................................................. 1
Something different ......................................................................................................... 2
Something familiar .......................................................................................................... 3
Something comforting ..................................................................................................... 4
Something challenging .................................................................................................... 5
Something for everyone in your group ........................................................................... 6
Something restful ............................................................................................................ 7
Something active ............................................................................................................. 8
Other (please specify) ..................................................................................................... 96
No other consideration (DO NOT READ OUT) ............................................................. 97
Don’t know (DO NOT READ OUT) ................................................................................ 99

C3 And what would be your top choice destination for taking a short-break holiday in Australia? And what would be your second choice destination? And what would be your next choice?

PROBE FOR CITY/TOWN NAME.

D. DECISION-MAKING PROCESS

Thinking now about transport choices for short-break holidays.

D1 If you had to travel up to 400 kms to your short-break holiday destination, what type of transport would you generally choose? READ OUT

a car.......................................................................................................................... 1
bus/coach ..................................................................................................................... 2
train; or an................................................................................................................... 3
airplane....................................................................................................................... 4
Don’t know/It depends (DO NOT READ OUT) ........................................................... 99

D2 And if you had to travel over 400 kms to your short-break holiday destination, what type of transport would you generally choose? READ OUT

a car.......................................................................................................................... 1
bus/coach ..................................................................................................................... 2
train; or an................................................................................................................... 3
airplane....................................................................................................................... 4
Don’t know/It depends (DO NOT READ OUT) ........................................................... 99

D3 And for short trip holidays, for which if any of the following would you generally make arrangements/bookings in advance? READ OUT

accommodation ........................................................................................................... 1
transfers to accommodation (if applicable) ................................................................. 2
car-hire at destination ............................................................................................... 3
tours .......................................................................................................................... 4
attractions ................................................................................................................... 5
festivals/events .......................................................................................................... 6
restaurants .................................................................................................................. 7
tours .......................................................................................................................... 8
Other (specify) .......................................................................................................... 96
Nothing in advance ................................................................................................. 97
Don’t know/It depends (DO NOT READ OUT) ......................................................... 99

D4 What would be your preferred way to make bookings for short-break holidays? READ OUT. SINGLE ANSWER ONLY
**D5** What information source are you likely to use to obtain information about short-break holidays? **MULTIPLE ANSWERS POSSIBLE**

<table>
<thead>
<tr>
<th>Source</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Agent</td>
<td>1</td>
</tr>
<tr>
<td>Internet</td>
<td>2</td>
</tr>
<tr>
<td>Tourist Office / Visitor Information Centre</td>
<td>3</td>
</tr>
<tr>
<td>Travel Book, Guide or Brochure</td>
<td>4</td>
</tr>
<tr>
<td>Motoring Association</td>
<td>5</td>
</tr>
<tr>
<td>Advertising / Travel Articles or Documentaries (TV, Radio, Print)</td>
<td>6</td>
</tr>
<tr>
<td>Friends</td>
<td>7</td>
</tr>
<tr>
<td>Relatives</td>
<td>17</td>
</tr>
<tr>
<td>Previous visit</td>
<td>8</td>
</tr>
<tr>
<td>Airline Company</td>
<td>9</td>
</tr>
<tr>
<td>Tourism Australia.com</td>
<td>10</td>
</tr>
<tr>
<td>Work / Business colleagues</td>
<td>12</td>
</tr>
<tr>
<td>Bus/Railway company</td>
<td>13</td>
</tr>
<tr>
<td>Telephone directory (Yellow/White pages, business directory)</td>
<td>14</td>
</tr>
<tr>
<td>Social Club or other association Church group, university</td>
<td>15</td>
</tr>
<tr>
<td>None (DO NOT READ OUT)</td>
<td>97</td>
</tr>
<tr>
<td>Other (please specify) (DO NOT READ OUT)</td>
<td>98</td>
</tr>
<tr>
<td>Don’t know (DO NOT READ OUT)</td>
<td>99</td>
</tr>
</tbody>
</table>

**D6** How far ahead are you likely to plan for a short-break holiday? **SINGLE ANSWER ONLY**

<table>
<thead>
<tr>
<th>Planning Period</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within 1 week</td>
<td>1</td>
</tr>
<tr>
<td>Within 2 weeks (over 1 week)</td>
<td>2</td>
</tr>
<tr>
<td>Within 3 weeks (over 2 weeks)</td>
<td>3</td>
</tr>
<tr>
<td>Within 1 month (over 3 weeks)</td>
<td>4</td>
</tr>
<tr>
<td>Within 3 months (over 1 month)</td>
<td>5</td>
</tr>
<tr>
<td>Within 6 months (over 3 months)</td>
<td>6</td>
</tr>
<tr>
<td>Within 1 year (over 6 months)</td>
<td>7</td>
</tr>
<tr>
<td>Over 1 year</td>
<td>8</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>99</td>
</tr>
</tbody>
</table>
Short-Break Holidays—A Competitive Destination Strategy

E) COMPETITION

E1 Did you recently receive a ‘government stimulus payment’ of up to $900?

Yes ....................................................................................................................... CONTINUE
No....................................................................................................................... SKIP TO E3
Don’t Know ....................................................................................................... SKIP TO E3

E2 How did you use your government stimulus payment?

SINGLE RESPONSE

If spent payment on multiple items, ask ‘How did you use most of the payment?’

Pay off mortgage or other debts ........................................................................... 1
Put towards home improvements ........................................................................... 2
Put towards home entertainment (TV/Games console/DVDs/Blu-Ray/Ipod etc.) ......... 3
Put towards a car .................................................................................................... 4
Spend on gambling/pokies ...................................................................................... 5
Put towards a short-break holiday .......................................................................... 6
Spend on clothes ..................................................................................................... 7
Save/Invest ............................................................................................................. 8
Put towards a long holiday ..................................................................................... 9
Local entertainment (restaurants, theatre, cinema, etc.) ......................................... 10
Put towards school/education ................................................................................ 11
Donate to charity .................................................................................................... 12
Other (please specify) .......................................................................................... 96
Don’t Know ......................................................................................................... 99

E3 If you were planning a short-break holiday in Australia in the near future, what would be the three most important destination features that you would consider?

SELECT UP TO 3 REASONS IN RANKED ORDER

A range of attractions and activities ..................................................................... 1
4 – 5 star accommodation .................................................................................... 2
Presence of friends and relatives .......................................................................... 3
Opportunity to combine work or personal care (doctor, solicitor) with short break .. 4
Good restaurants .................................................................................................. 5
Easy access (by car or air) ..................................................................................... 6
World-class attractions ......................................................................................... 7
Festivals and events ............................................................................................. 8
Various travel packages (i.e. flight and accommodation package) ......................... 9
Nightlife ............................................................................................................... 10
Other (please specify) .......................................................................................... 96
No other reason .................................................................................................... 97
Don’t Know ......................................................................................................... 99

E4 How interested would you be in an Australian short-break holiday package? By that I mean where your transport to the destination is included in the price along with one or more of the following: accommodation, food, car-hire or tour costs? How interested would you be in such a package. Would you be…READ OUT.

Very Interested .................................................................................................... 5
Interested ............................................................................................................ 4
Somewhat Interested .......................................................................................... 3
Not Interested .................................................................................................... 2
Not at all Interested .............................................................................................. 1
Don’t know (DO NOT READ OUT) ..................................................................... 99

E5 Can you think of any particular advertising campaign, promotion or program that has influenced your choice of destination for either a short-break or a long break holiday in Australia?
Short-Break Holidays—A Competitive Destination Strategy

IF YES: Probe for details of campaign or program (not necessarily the destination)

E5a Have you heard or seen the Australian government’s recent No Leave, No Life campaign?

Yes .................................................................................................................................. 1
No............................................................................................................................. 2
Don’t Know ............................................................................................................... 3

IF YES CONTINUE. OTHERS GO TO DEMOGRAPHICS

E5b And what do you think the key message is behind this campaign?

F) PERSONAL PROFILE

These next few questions are now about you, to make sure that we have spoken to a good cross-section of people. Your answers will of course be treated in the strictest confidence.

F.1 Where do you live? (What is the suburb or town of this household?)

<RECORD USING LOCATION FILE>

F.2a How many people aged 15+ usually live in your household? (Don’t forget to count yourself)

<RECORD NUMBER>

F.2b How many children aged 15 or under usually live in your household?

<RECORD NUMBER>

COMPUTER TO CHECK F2a: IF NUMBER OF PERSONS IN HOUSEHOLD AGED 15+ IS 2 OR MORE ASK F5
ELSE COMPUTER TO IMPUTE SINGLE FOR F5 AND SKIP RESPONDENT DIRECTLY TO F6

F.5 What is your marital status? Are you single or a part of a couple?

Single (never married, divorced, separated, widowed and not part of a couple)................................. 1
Part of a couple (married, defacto, living together) ................................................................. 2
Refused ................................................................................................................... 98

F.6 Which of the following applies to you? Are you...

READ OUT—STOP AT FIRST YES

Working Full-time ................................................................................................. 1
Working Part-time............................................................................................... 2
Unemployed and looking for work ........................................................................ 3
Retired or on a pension ....................................................................................... 4
Mainly doing home duties................................................................................... 5
Studying ................................................................................................................ 6
Other, SPECIFY ................................................................................................ 96
Refused ................................................................................................................ 98

IF F.6 = 1 OR 2 ASK F.7a ELSE GO TO F.8

F.7a Are you entitled to any recreation leave in your current job?
Yes ........................................................ 1  F.7b
No ......................................................... 2  F.8
Refused .................................................. 9  F.8
Don’t know ................................. 99  F.8

**F.7b** How many days of recreation leave do you currently have owing to you?

**INTERVIEWER NOTE: 1 WEEK = 5 DAYS**

...............................................RECORD NUMBER OF DAYS.
...............................................RECORD ‘D’ FOR DON’T KNOW.

**F.8** And which of these groups would contain the combined income of everyone in this household, before tax or anything else is taken out? Please include pensions and allowances from all sources.

<table>
<thead>
<tr>
<th>Weekly</th>
<th>Annual equivalents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 1 – 79</td>
<td>1. 1 – 4,199</td>
</tr>
<tr>
<td>2. 80 – 159</td>
<td>2. 4,200 – 8,299</td>
</tr>
<tr>
<td>3. 160 – 299</td>
<td>3. 8300 – 15599</td>
</tr>
<tr>
<td>4. 300 – 499</td>
<td>4. 15600 – 25999</td>
</tr>
<tr>
<td>5. 500 – 699</td>
<td>5. 26000 – 36399</td>
</tr>
<tr>
<td>6. 700 – 999</td>
<td>6. 36400 – 51999</td>
</tr>
<tr>
<td>7. 1000 – 1499</td>
<td>7. 52000 – 77999</td>
</tr>
<tr>
<td>8. 1500 – 1999</td>
<td>8. 78000 – 103999</td>
</tr>
<tr>
<td>12. 2500 – 2899</td>
<td>12. 130,000 – 149,999</td>
</tr>
<tr>
<td>13. 2900+</td>
<td>13. 150,000+</td>
</tr>
<tr>
<td>98. Refused</td>
<td>98. Refused</td>
</tr>
<tr>
<td>99. Don’t know</td>
<td>99. Don’t know</td>
</tr>
</tbody>
</table>

**CLOSE**

Thank you very much for your assistance. May I just confirm your name and telephone number? Sometimes my supervisor needs to ring back and check my work. [CONFIRM DETAILS]

As this is market research it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes. Your answers will be combined with those of other participants, and no individual response will ever be identified.

Once this project is completed, your contact details will be removed from your responses.

Until then, under the Privacy Act, you have the right to request access to the information you have provided.

If you have any queries you can call NWC Opinion Research on (03) 9935 5788 or Professor Peter Murphy at La Trobe University, Melbourne. He can be contacted at e-mail p.murphy@latrobe.edu.au or on 03 9479 3770.

*Thank you very much for your time.*

*THE END*
AUTHORS

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Peter is an Emeritus Professor at La Trobe University and the University of Victoria, Canada. He completed a forty year career in tertiary education in March 2009 and is now enjoying semi-retirement. He has written five books and over 60 journal papers on various aspects of tourism and is now keen to put several of his observations into practice, including the pursuit of short-break holidays.
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Dr Outi Niininen is a Senior Lecturer in Marketing in the School of Management at La Trobe University. Outi joined the university in 2005, having worked previously in the tourism department of the University of Surrey. Outi’s research interests broadly fall under the heading of consumer psychology and to what extent perception influences consumer behaviour. Tourism marketing specific research projects have focused on human-computer interaction, crisis management, destination loyalty and destination branding.
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Dale Sanders
Dale is the co-author of a number of STCRC reports including: Impact of Bushfires on Tourism and Visitation in Alpine National Parks, Engagement of the Capital Tourism Industry with the Local Community and the National Visitor Satisfaction Project. Dale’s research interests include sustainable development, Indigenous tourism, crisis and disaster management, tourism education and event management. Dale has degrees in arts and social sciences and her Ph.D. focused on sustainable development in regional destinations.
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COMMERCIALISE
RESEARCH AND DEVELOPMENT
COLLABORATION
EDUCATION AND TRAINING
UTILISE

• Travel and tourism industry
• Academic researchers
• Government policy makers

• New products, services and technologies
• Uptake of research finding by business, government and academe
• Improved business productivity
• Industry-ready post-graduate students
• Public good benefits for tourism destinations

INDUSTRY PARTNERS

UNIVERSITY PARTNERS

COMMERCIALISATION

EC3, a wholly-owned subsidiary company, takes the outcomes from the relevant STCRC research; develops them for market; and delivers them to industry as products and services. EC3 delivers significant benefits to the STCRC through the provision of a wide range of business services both nationally and internationally.

KEY EC3 PRODUCTS

Chairman: Stephen Gregg
Chief Executive: Ian Kean
Director of Research: Prof. David Simmons
CRC for Sustainable Tourism Pty Ltd
Gold Coast Campus Griffith University
Queensland 4222 Australia   ABN 53 077 407 286
Telephone: +61 7 5552 8172   Facsimile: +61 7 5552 8171
Website: www.crctourism.com.au
Email: info@crctourism.com.au
Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program.

STCRC is the world’s leading scientific institution delivering research to support the sustainability of travel and tourism—one of the world’s largest and fastest growing industries.

Introduction
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.

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 searchers and industry or other users; and
- efficiency in the use of intellectual and other research outcomes.