SHORT-BREAK HOLIDAYS—
A COMPETITIVE DESTINATION STRATEGY

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SUSTAINABLE TOURISM CRC

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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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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 holidays.
- 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.

- 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 Tsiotsou 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 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

(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.

- 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

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

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' 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

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

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.

- 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.

- 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

Last S-B Holiday	**No. (Million)**	**Age**	**Household Size**	**Income**	**Children Under 15**	**Rec. Leave Entitlement**	**Residential Location**
Within last 6 months	6.74 M (41.1%)						
Within 7 – 12 months	2.26 M (13.8%)						
Up to 2 years ago	1.80 M (11.0%)	25 – 34 (18.1%)	Three (13.9%) Four (13.4%)	$52 – 104K (12.4%) $104K+ (13.1%)	Yes (12.7%)	Yes (11.4%)	Metro (11.8%)
Up to 3 years ago	0.86 M (5.2%)	25 – 34 (7.6%)	Four (6.0%) Five (8.6%)		Yes (6.8%)		Metro (5.8%)
More than 3 years ago	3.39 M (20.7%)						
Never	1.20 M (7.3%)	18 – 24 (10.3%) 65+ (10.1%)		Under $26K (10.4%)	No (7.9%)	No (8.8%)	

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

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

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

Number of Nights	No. (Million)	Age
One	1. 04 M (8.9%)	
Two	3.35 M (28.7%)	
Three	4.25 M (36.4%)	
Four	3.02 M (25.9%)	65+ (40.7%)

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 6: Main Purpose of Last Short-Break Holiday

Purpose	No. (Million)	Age	Household Size	Income	Children Under 15	Residential Location
Holidays, (leisure and relaxation)	6.32 M (54.2%)		Four (64.9%)	$52K – 104K (61.1%)	Yes (62.2%)	Metro (59.7%)
Visiting relatives	1.97 M (16.9%)	65+ (27.0%)	One (26.0%)			
Visiting friends	1.47 M (12.6%)					
Entertainment (events, performances, festivals)	0.48 M (4.1%)			Less than $26K (9.2%)		Regions (6.6%)
Sport (participation)	0.28 M (2.4%)					
Sport (spectator)	0.25 M (2.1%)					
Shopping	0.16 M (1.4%)					

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

Purpose	No. * (Million)	Age	Household Size	Residential Location
Holiday (leisure, relaxation)	8.71 M (74.7%)			Metro (81.1%)
Visiting relatives	2. 76 M (23.7%)			
Visiting friends	2.75 M (23.6%)	18 – 24 (36.5%)	Three (33.9%)	
Entertainment	1.32 M (11.3%)			Regions (16.8%)
Shopping	0.66 M (5.7%)			Regions (9.2%)
Sport (participation)	0.51 M (4.4%)			
Sport (spectator)	0.41 M (3.5%)			Regions (6.2%)

* 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

Mode	No. * (Million)	Age	Household Size	Income	Recreation
Private vehicle	8.45 M (72.5%)				
Air	2.27 M (19.5%)				
Rail	0.42 M (3.6%)	18 – 24 (11.3%)	One (10.3%)	$26K – 52K (8.3%)	No (5.4%)
Bus/Coach	0.21 M (1.8%)	65+ (7.3%)		Less than $26K (7.3%)	No (2.9%)
Rented vehicle	0.12 M (1.0%)				
Ship	0.98 M (0.8%)				
Campervan, motor home	0.37 M (0.3%)				

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

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

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 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

Activities	**No. (Million)**	**Age**	**Household**		**Children under 15**	**Residential Location**
			Size	**Income**		
1. 'Social'	10.57 M (90.7%)					
Eat out	7.01 M (60.2%)					
Walk or drive around	5.19 M (44.5%)	50 – 64 (51.9%)			No (49.2%)	
Go shopping (pleasure)	4.19 M (36.0%)					
2. 'Outdoor or nature'	6.04 M (51.8%)					
Go to beach incl. swimming	3.76 M (32.3%)	35 – 49 (38.5%)	Four (42.8%)	$52K – 104K (39.9%)	Yes (41.0%)	Metro (36.1%)
Go bush walking or on rainforest walks	2.27 M (19.5%)					
Visit national parks/state forests	1.40 M (12.0%)					
3.' Local attractions and tourist activities'	3. 63 M (31.2%)					
Go to markets (street, weekend or arts and crafts)	1.50 M (12.9%)					
Visit wineries	0.86 M (7.4%)		Two (11.1%)			Metro (9.1%)
Visit wildlife parks/ zoos/aquariums	0.74 M (6.4%)		Four (11.1%)			
4. 'Sport or active outdoor'	3.28 M (28.1%)					
Go fishing	1.02 M (8.7%)					
Play other sports	0.76 M (6.6%)					
Exercise (gym, swim)	0.62 M (5.4%)	35 – 49 (8.9%)			Yes (8.4%)	
5. 'Arts, heritage or festival'	2.61 M (22.4%)					
Visit museums or art galleries	1.37 M (11.8%)	50 – 64 (18.1%)				
Visit historic/heritage buildings, sites or monuments	0.75 M (6.4%)					
Attend theatre, concerts or other performing arts	0.57 M (4.9%)					Regions (7.6%)

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 11: Travel Party Structure

Type	No. (Million)	Age	Household Size	Income	Children Under 15	Residential Location
Adult couple	3.83 M (32.9%)	50 – 64 (47.2%) 65+ (45.7%)	Two (55.1%)	$104K+ (40.5%)	No (40.7%)	
Family group	3.10 M (26.6%)	35 – 49 (47.0%)	Four (49.8%) Five (55.0%) More than 5 (46.7%)	$52 – 104K (32.7%)	Yes (58.1%)	
Friends or relatives without children	2.28 M (19.5%)	18 – 24 (33.9%)	One (29.2%)		No (25.5%)	Metro (22.7%)
Travelling alone	1.43 M (12.3%)		One (39.9%)	Less than $26K (28.1%)		
Friends/ relatives travelling together with children	0.80 M (6.8%)				Yes (11.5%)	
Sporting or community group (Non-school)	0.11 M (1.0%)	65+ (4.6%)	One (3.1%)			

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

Expenditure	No. (Million)	Age	Household Size	Income	Children Under 15	Rec. Leave Entitlement
Up to $250	2.96 M (25.4%)	18 – 24 (46.1%)	One (35.2%)	Less than $26K (42.3%)	No (29.2%)	No (30.0%)
$251 – 500	3.10 M (26.6%)					
$501 – 750	1.35 M (11.6%)	35 – 49 (15.9%)				
$751 – 1,000	1. 90 M (16.3%)					
$1,001 – 1,500	0.98 M (8.4%)					Yes (11.5%)
$1,501 plus	1.26 M (10.8%)			$104K+ (16.0%)		
Refused/don't know	0.11 M (1.0%)					

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 13: Reasons for No Short-Break Holidays

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

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).

Table 14: Entitlement for Recreation Leave

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

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 15: Use of Recreation Leave, Apart from Holidays

Uses	No.* (Million)	Children under 15	Residential Location
Relaxed at home	2.26 M (28.9%)		
Travel internationally	2.09 M (26.7%)		Metro (31.8%)
Worked on home (DIY)	0.83 M (10.6%)		
Looked after family members	0.74 M (9.5%)	Yes (17.8%)	
Been saving up leave	0.46 M (5.9%)		

* 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.

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

Aware	No. (Million)	Age	Household Income	Rec. Leave Entitlement
Yes	8.89 M (54.1%)	50 – 64 (61.0%)	$104K+ (61.3%)	Yes (62.8%)
No	7.37 M (44.9%)	18 – 24 (61.4%)		No (49.9%)

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

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

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 18: Motivational Factors for a Short-Break Holiday

Factors	No. (Million)	Age	Household Size	Income	Children Under 15	Rec. Leave Entitlement
Getting away from it all	7.01 M (42.7%)	25 – 34 (52.3%) 35 – 49 (49.3%)	Four (52.3%)	$52 – 104K (49.3%) $104K+ (49.7%)	Yes (52.3%)	Yes (48.8%)
Change of scene	3.41 M (20.8%)	65+ (35.9%)	One (28.2%)		No (23.5%)	No (23.2%)
Something new and exciting	2.28 M (13.9%)	18 – 24 (24.4%)				
Stress	1.32 M (8.1%)	25 – 34 (13.2%)				
Change of weather	0.91 M (5.5%)					
Leave/Rec. entitlement	0.82 M (5.0%)					Yes (7.9%)
Socialising /visiting friends and relatives	0.17 M (1.0%)					
Specific event or attraction	0.11 M (0.7%)					

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.

Table 19: Most Important Destination Features

Factor	No (%)	Age
Coastal attractions	4692 (28.6%)	
Plenty to see and do	2982 (18.2%)	
Not too touristy	1785 (10.9%)	
Regional attractions	1505 (9.2%)	65+ (15.1%)
Good weather	1208 (7.4%)	
Capital city attractions	1069 (6.5%)	
Mountain attractions	1061 (6.5%)	
Like the people in that location	1005 (6.1%)	
To help retain traditions and heritage of older communities	441 (2.7%)	65+ (5.4%)

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

Activity	No. (Million)	Age	Children Under 15
Festivals and events	3.01 M (18.3%)		
Support local crafts and business	2.14 M (13.0%)	50 – 64 (18.9%)	
Restaurants	1.88 M (11.4%)		
Shopping	1.86 M (11.3%)		
Sport	1.46 M (8.9%)		
Museums	0.92 M (5.6%)	65+ (10.3%)	
Wineries	0.92 M (5.6%)		
Nightlife	0.89 M (5.5%)	18 – 24 (23.2%)	No (6.7%)

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

Factor	No. (Million)	Age	Household Income	Residential Location
VFR	8.14 M (49.6%)			Regions (57.7%)
Learn about different cultures	4. 30 M (26.2%)		$52 – 104K (31.3%)	Metro (30.4%)
Attend club events	0.62 M (3.8%)	18 – 24 (10.4%)		
Demonstrate support for hard-hit regions	0.54 M (3.3%)			
Attend tournaments	0.47 M (2.9%)			
Scenery and location	0.42 M (2.6%)			

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

Factors	No. (Million)	Age	Household Size	Household Income	Rec. Leave Entitlement	Residential Location
VFR	4.40 M (26.8%)	65+ (35.8%)		Less than $26K (37.4%)		Regions (34.7%)
Getting away from it all	3.45 M (21.0%)		Four (28.8%)	$104K+ (28.3%)	Yes (26.1%)	Metro (23.8%)
Change of scene	0.85 M (5.2%)	65+ (8.8%)				
Coastal attractions	0.70 M (4.3%)					
Learn about different cultures	0.67 M (4.1%)					

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 23: First Most Important Consideration when Choosing a Short-Break Destination

Consideration	No. (Million)	Age	Household Size	Income	Children under 15
Value for money	6.01 M (36.7%)				
Something different	2.77 M (16.9%)				
Something restful	2.59 M (15.8%)				No (17.8%)
Something for everyone in the group	2.21 M (13.5%)	35 – 49 (21.0%)	Four (24.3%) Five (24.9%)	$52K – 104K (17.4%)	Yes (23.2%)
Something active	1.17 M (7.1%)				

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

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

Table 24 (continued)

Region	No. (Million)	Age
Regional	9.72 M (59.3%)	35 – 49 (65.4%)
Capital Cities	6.24 M (38.0%)	

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

Transport Mode	No. (Million)	Age	Household Size	Income	Children Under 15	Rec. Leave Entitlement
Car	12.55 M (76.5%)	35 – 49 (84.1%)		$104K+ (83.7%)	Yes (81.7%)	Yes (81.7%)
Airplane	2.20 M (13.4%)					
Train	0.99 M (6.1%)	65+ (14.6%)	One (15.5%)	Less than $26K (14.9%)		No (8.0%)
Bus/Coach	0.49 M (3.0%)	65+ (10.2%)	One (8.1%)	Less than $26K (10.2%)	No (4.1%)	No (4.4%)
Not sure	0.17 M (1.0%)					

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

Transport Mode	No. (Million)	Age	Household Size	Income	Children Under 15	Rec. Leave Entitlement	Residential Location
Airplane	9.88 M (60.2%)					Yes (66.3%)	Metro (65.3%)
Car	4.66 M (28.4%)				Yes (34.5%)		Regions (38.2%)
Train	0.99 M (6.1%)	65+ (13.8%)	One (12.0%)	Less than $26K (13.8%)		No (7.7%)	
Bus/Coach	0.28 M (1.7%)	65+ (6.4%)	One (5.5%)	Less than $26K (6.1%)		No. (2.6%)	
Not sure	0.59 M (3.6%)						

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

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

* 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

Preference	No. (Million)	Age	Household Size	Income	Children Under 15	Rec. Leave Entitlement	Residential Location
By Internet	8.96 M (54.6%)	25 – 34 (65.4%) 35 – 49 (61.5%)	Four (68.9%)	$52K – 104K (61.9%) $104K+ (72.8%)	Yes (61.7%)	Yes (68.3%)	Metro (58.7%)
By phone	4.86 M (29.6%)	65+ (38.5%)				No (32.7%)	Regions (35.6%)
In person at travel agent	1.82 M (11.1%)	65+ (22.7%)	One (19.5%)	Less than $26K (26.3%)	No (12.8%)	No (14.3%)	
Through a friend	0.41 M (2.5%)		One (5.4%)				
Don't book	0.11 M (0.7%)	65+ (2.1%)					
By post	0.058 M (0.4%)		More than Five (3.1%)				

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

Information Source	**No. (Million)**	**Age**	**Household Size**	**Income**	**Children Under 15**	**Rec. Leave Entitlement**	**Residential Location**
Internet	11.11 M (67.7%)	18 – 24 (80.7%) 25 – 34 (87.0%) 35 – 49 (77.7%)	Four (83.1%)	\$52K–104K (78.5%) \$104K+ (85.0%)	Yes (81.8%)	Yes (81.7%)	Metro (70.4%)
Friends	3.97 M (24.2%)						
Advertising travel articles or documentaries	3.25 M (19.8%)	50 – 64 (27.4%)					
Travel agent	2.64 M (16.1%)	65+ (28.9%)	One (23.2%)	Less than \$26K (23.1%)		No (18.5%)	
Relatives	2.64 M (16.1%)					No (18.3%)	
Travel book, guide or brochure	2.57 M (15.6%)		One (22.8%)				
Tourist office or VIC	1.40 M (8.6%)	65+ (14.7%)			No (10.1%)		
Previous visit	1.37 M (8.4%)						
Motoring association	0.86 M (5.2%)	65+ (10.8%)		\$26K – 52K (9.0%)			

* 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 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 30: Received Government Stimulus Package

Situation	No. (Million)	Age	Household Income	Children Under 15	Rec. Leave Entitlement
Yes	10.25 M (62.5%)	25 – 34 (72.4%) 35 – 49 (72.3%)	\$52K – 104K (74.0%)	Yes (70.0%)	Yes (79.8%)
No	5.83 M (35.5%)	18 – 24 (51.5%) 65+ (54.6%)	Less than \$26K (51.7%)	No (39.2%)	No (45.8%)
Don't know	0.24 M (1.5%)				
Refused to say	0.09 M (0.5%)				

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

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

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 who 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

Feature	No. (Million)	Age	Household Size
Range of attractions and activities	4.45 M (27.1%)	25 – 34 (37.7%)	Four (34.9%)
Presence of friends, relatives	4.23 M (25.8%)	65+ (34.0%)	
4 – 5 Star accommodation	1.54 M (9.4%)		
Easy access by car or air	1.25 M (7.6%)		
Festivals and events	1.16 M (7.1%)	18 – 24 (15.1%)	
Various travel packages	0.80 M (4.9%)		
Good restaurants	0.69 M (4.2%)		
Nightlife	0.53 M (3.2%)	18 – 24 (11.6%)	

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

Feature	No.* (Million)	Age	Children Under 15	Household Income	Rec. Leave Entitlement
Range of attractions and activities	9.53 M (58.1%)	35 – 49 (64.9%)	Yes (65.0%)		
Presence of friends and relatives	8.39 M (51.1%)				
Easy access by car or air	4.97 M (30.3%)				
4 – 5 star accommodation	4.34 M (26.4%)				
Good restaurants	4.31 M (26.3%)			$104K+ (34.4%)	Yes (31.6%)
Festivals and events	4.04 M (24.6%)	18 – 24 (44.8%)			
Various travel packages	1.92 M (11.7%)				
Nightlife	1.83 M (11.2%)	18 – 24 (43.2%) 25 – 34 (17.4%)			
World class attractions	1.69 M (10.3%)				

* 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