



SHORT-BREAK HOLIDAYS—A COMPETITIVE DESTINATION STRATEGY

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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)'. 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.