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HOLIDAY TRAVEL BY TASMANIANS

This paper looks at the Tasmanian population and examines the make up of those who take family holidays and those who do not. The paper is the result of a home interview survey carried out by ABS in 1984 which was supplementary to their normal employment survey.

The paper examines the effect of income and of household composition on those who travel and, importantly, on those who do not. The study also provided important information on travel behaviour by Tasmanians on their family holidays.

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HOLIDAY TRAVEL BY TASMANIANS

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INTRODUCTION

Although frequent surveys are carried out by airlines and State and Commonwealth Governments of the travelling public and their leisure travel habits, few studies have looked at the total population and examined the makeup of those who holiday and those who do not.

This paper is the result of a home interview survey carried out by A.B.S. which was supplementary to their normal employment survey. The survey questioned one household in every sixty in the State; about 2200 households.

The survey was concerned with assessing the importance of income and of household composition on holiday travel behaviour, including those who do not holiday at all. For the purposes of the survey, a holiday had to be a family holiday lasting more than four days. A family holiday was defined as one involving more than one member of the household, except, of course, where the household consisted of a single person.

The purpose of travel was separately identified so as to include holiday travel incorporating business, visits to friends or relatives, and sporting activity. Family groups also had to be separately categorised and, in all, eight groups were used.

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single
single parent child(ren) under 14
single parent child(ren) over 14
single parent child(ren) both over and under 14
other households

The results that the survey yielded provided broad information on those Tasmanians who holidayed within the State, to interstate and overseas destinations and, most importantly, on those who did not travel at all. It also enabled the relative proportions of each group to be determined, providing a perspective on the holiday travel of the population.

The use of income and household composition provides an insight into the factors that influence holiday travel behaviour. This paper is a preliminary study aimed at establishing general conclusions about travel patterns based on a series of cross tabulations prepared by A.B.S. It is hoped that subsequent analysis of the data will provide more specific information on the quantitative importance of the various factors.

I would like to thank the Hobart office of A.B.S. for their kind assistance in undertaking the survey and processing the results. The conclusions drawn are my own.

HOLIDAY TRAVEL BY TASMANIANS

HOLIDAY TRAVEL BEHAVIOUR - AN OVERVIEW

Holiday Destination

The survey provided some 2200 responses from which it was possible to draw inferences on the holiday travel behaviour of 140,351 Tasmanian households. Of these, nearly one-third had not had a holiday in the past three years with their family. Of those who took a holiday, one-third had a holiday only in Tasmania and two-thirds only interstate or overseas. About two-fifths had had holidays both within and outside Tasmania.*

TABLE 1 : TRAVEL BEHAVIOUR BY TASMANIANS

<u>Travel Behaviour</u>	<u>Households</u>	<u>Per Cent</u>
Did not holiday in past 3 years	44,343	31.6
Holidayed in Tasmania (1)	27,699	19.7
Holiday interstate or overseas	68,309	48.7
Holidayed both in Tasmania and i/s	41,372	29.5
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Total (2)	140,351	

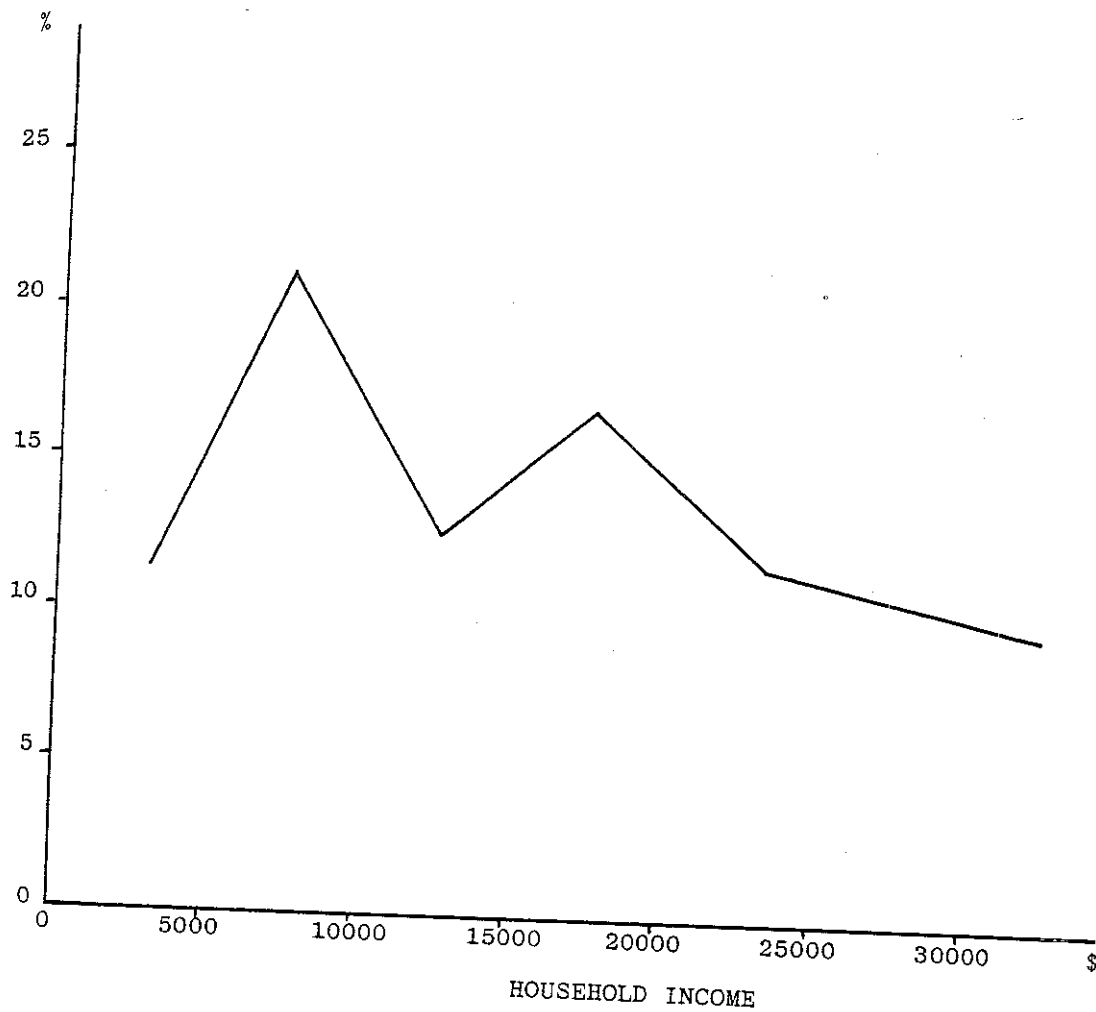
Notes: 1. Holiday taken lasted more than 4 days.
2. Holidays taken both in Tasmania and interstate/overseas not included in total to avoid double counting.

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*The difficulties noted earlier about the definition of holiday and of family should be borne in mind, and in particular that there would have been many more holidays taken than reported in the survey because they fell outside the survey definition of a holiday.

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FIG. 1 : INCOME DISTRIBUTION OF RESPONDENTS



Note: Income defined as income of head of household and spouse.

HOLIDAY TRAVEL BY TASMANIANS

Frequency of Holidays

About half the households surveyed had not had a holiday in the past three years. Of those who did holiday, there was a tendency to take holidays more frequently in Tasmania than interstate as might be expected. Nearly 40 per cent of Tasmanians have a significant holiday (i.e. more than 4 days) in Tasmania every year while, of those who holiday interstate, about half do so less frequently than once every three years.

TABLE 2 : FREQUENCY OF HOLIDAYS

	<u>Holiday in</u>	<u>Holiday outside</u>
	<u>Tasmania</u>	<u>Tasmania</u>
More than once a year	13.3%	2.0%
Once a year	24.6%	11.4%
Once every two years	4.2%	9.0%
Once every three years	2.0%	5.9%
Less than once every 3 years	5.1%	20.3%
No holiday	50.8%	51.3%

Effect of Income on Holiday Travel

Income is known to have a significant impact on holiday travel; as income increases, expenditure on holidays also increases. Studies have shown that when holiday travel is constrained by time, expenditure still increases with income as more expensive travel is consumed.

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TABLE 3 : EFFECT OF INCOME ON HOLIDAY BEHAVIOUR

<u>Respondents</u> <u>Income %</u>	<u>Proportion of</u> <u>Households %</u>	<u>Do not</u> <u>Holiday %</u>	<u>Holiday</u> <u>in Tas.%</u>	<u>Holiday</u> <u>i/s or o/s %</u>
0- 5,000	11.4	18.8	5.3	8.8
5-10,000	21.2	29.7	17.5	16.8
10-15,000	12.6	13.3	14.8	11.2
15-20,000	16.8	12.7	20.1	18.3
20-25,000	11.8	7.9	16.2	12.7
25-30,000	10.6	9.4	12.6	10.6
30,000 plus	9.5	2.2	8.1	15.2

- Note:
1. Totals do not add to 100% because respondents who do not know or would not divulge their income (5823 respondents) have been excluded.
 2. Household income is defined as income of head of household and spouse.

HOLIDAY TRAVEL BY TASMANIANS

Interestingly, income also influences the purpose of taking a holiday. This is most easily observed in interstate holidays where the cost of the holiday is significant to most levels of income.

Figure 2 shows that at lower incomes most interstate holidays are taken to visit friends and relatives but as income increases more and more travel for leisure. This could be for two reasons. Either low income families can rarely afford to keep in touch with their relatives and friends and so this is a prime reason for a visit. Alternatively, low income families stay with friends or relatives so as to minimise expenditure.

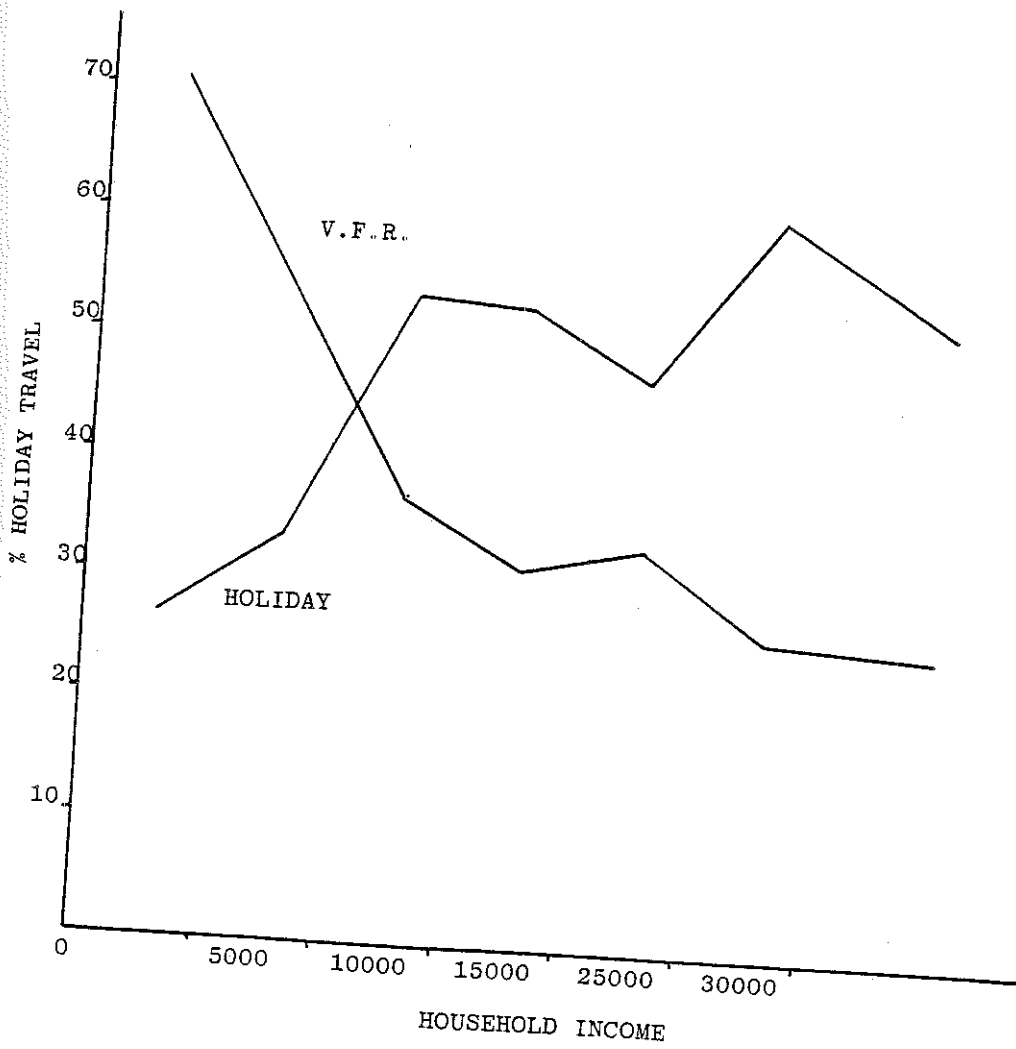
This may explain, in part, why VFR travellers are often shown to have very high price elasticities, e.g. Smith & Toms (1978), Taplin (1980).

It is only at very high levels of income that the demand for travel is satiated (Newman, 1970), and this is borne out by the results of the survey. Non-holiday takers have lower incomes. Only 2% earn more than \$30,000 and only 19.5% earn more than \$20,000 per year. On the other hand, 36.9% of Tasmanian holidaymakers and 38.5% of interstate holidaymakers earn more than \$20,000 a year. The mean income of non-holidaymakers is \$16,500 as opposed to \$18,000 for respondents who holidayed in Tasmania and \$18,650 for interstate and overseas holidaymakers. The quantitative analysis of the impact of income on travel is one area that it is hoped will be developed further in later studies.

% HOLIDAY TRAVEL

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FIG. 2 : EFFECT OF INCOME ON HOLIDAY TRAVEL INTERSTATE



HOLIDAY TRAVEL BY TASMANIANS

Travel Behaviour by Household Composition

While income is universally recognised as a factor affecting travel behaviour, the influence of household composition is also important. It has, however, received less attention from researchers interested in leisure travel, although its significance has been examined in urban travel by Jones (1978), Brog (1982) and others.

Table 2.4 details the effect of household composition on holiday travel behaviour. Relative to the population, single people and married couples with and without children travel more than do single parent families. As would be expected, single people and married couples without children make proportionately more interstate and overseas trips. Conversely, married couples with children represent the biggest proportion - nearly two-thirds - of those taking Tasmanian holidays. Single parent families tend to have fewer holidays and fewer interstate holidays.

The holiday travel behaviour may be seen more clearly in Table 5 which compares the holiday behaviour of the estimated household numbers in each category. Single people and married couples have about four times more holidays interstate and overseas than in Tasmania while single parent families are as likely not to holiday at all.

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TABLE 4 : EFFECT OF HOUSEHOLD COMPOSITION ON OVERALL TRAVEL BEHAVIOUR

<u>Household Type</u>	<u>Proportion of Households</u>	<u>Do not Holiday</u>	<u>Holiday in Tas.</u>	<u>Holiday i/s or o/s</u>
Person living alone	17.1	18.1	8.7	20.0
Married couple only	24.1	24.2	14.4	28.1
MC child(ren) 15 +	10.6	9.6	10.3	11.5
MC child(ren) 0-14	27.2	19.8	42.6	25.8
MC children 0-14, 15 +	8.4	7.4	13.9	6.9
Single child(ren) 15 +	3.3	7.6	0.7	1.5
Single child(ren) 0-14	3.3	4.9	3.4	2.3
Single child(ren) 0-14, 15 +	1.6	2.4	2.4	0.7
Other households	4.2	6.0	3.6	3.2

TABLE 5 : RESPONDENT'S TRAVEL BEHAVIOUR BY HOUSEHOLD TYPE

<u>Household Type</u>	<u>Do not Holiday</u>	<u>Holiday in Tas.</u>	<u>Holiday i/s o/s</u>
Person living alone	8006	2399	13491
Married couple only	10675	3982	18976
MC, child(ren) 15 +	4231	2827	7739
MC, child(ren) 0-14	8754	11755	17382
MC, child(ren) 0-14, 15 +	3246	3824	4663
Single, child(ren), 15 +	3377	199	1004
Single, child(ren), 0-14	2164	924	1525
Single, child(ren), 0-14, 15 +	1040	674	462
Other households	2660	989	2174
	44153	27573	67416

HOLIDAY TRAVEL BY TASMANIANS

HOLIDAY MAKERS - TRAVEL BEHAVIOUR

As well as providing information on the behaviour of the total population in taking holidays, the survey also provides specific information on travel behaviour. This section of the paper will examine this behaviour in more detail while continuing to examine the influence in terms of income and household composition on holiday travel.

Travel Outside Tasmania - Mode of Travel

As an Island State, Tasmanians must use either sea or air as transport. The survey asked respondents how they travelled on their interstate holiday. They were given seven choices - air (with or without a vehicle), sea (with or without a vehicle), sea and air (with or without a vehicle) and other.

TABLE 6 : MODE OF TRAVEL TO INTERSTATE HOLIDAY DESTINATION

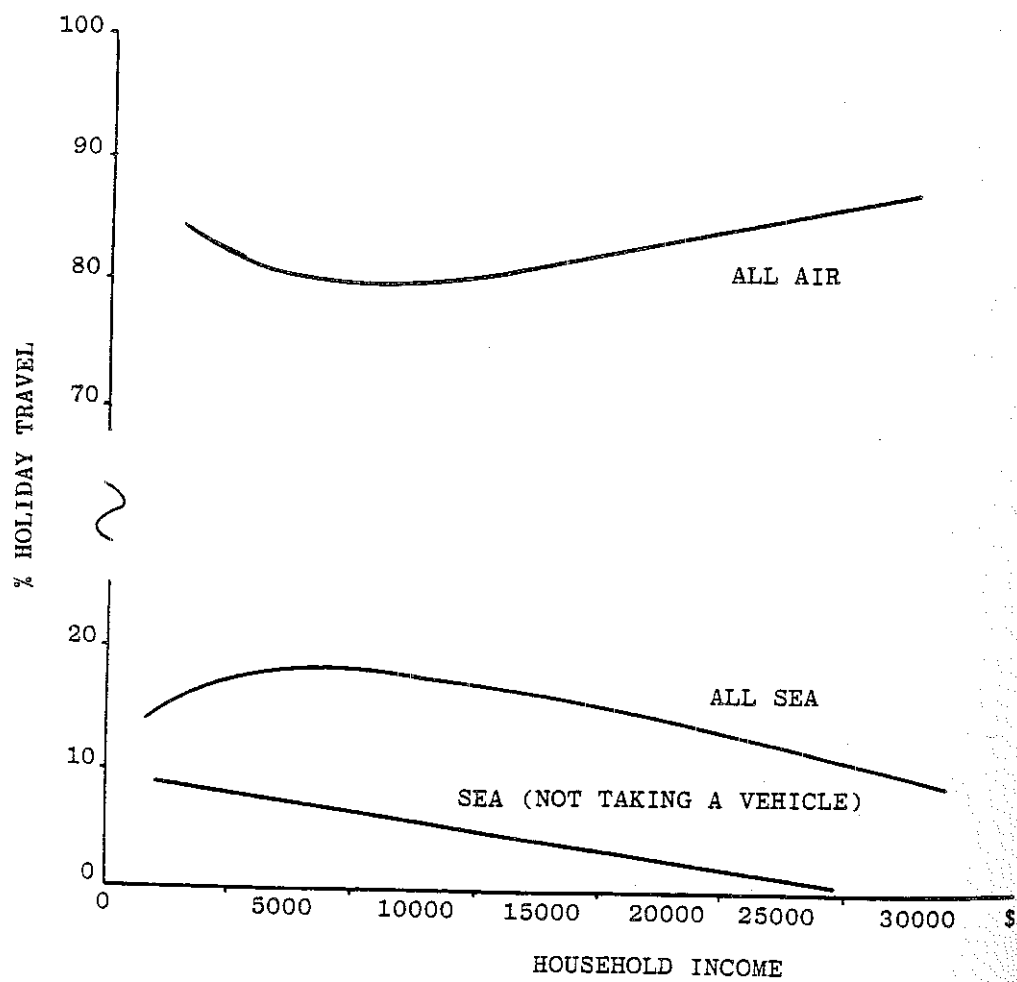
<u>Mode of Travel</u>	<u>Travellers Per cent</u>
Air without vehicle	82.1
with vehicle	1.5
Sea without vehicle	3.3
with vehicle	10.6
Air and sea without vehicle	0.8
Air and sea with vehicle	1.3
Other	0.4

Income has a strong effect on the mode of transport. This is shown in Fig. 3. Sea travel and, in particular, travel by sea unaccompanied by a vehicle decreases quite markedly with increasing income. The level of sea travel also decreases with the level of expenditure on the holiday although medium cost holidays frequently include travel by sea using the ferry to transport the vehicle.

Sea travel without a vehicle is mainly used on low cost holidays and its use declines markedly with holiday expenditure. This may reflect the convenience of air travel, particularly in terms of frequency and comfort. When this survey was undertaken, the sea passenger service was served by the Empress of Australia, an ageing vessel with few facilities, which provided a low cost service aimed at the bottom of the market. The new ferry Abel Tasman is a different concept, offering considerable comfort to its users.

HOLIDAY TRAVEL BY TASMANIANS

FIG. 3 : EFFECT OF INCOME ON MODE OF TRAVEL



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TABLE 7 : EFFECT OF HOLIDAY EXPENDITURE ON MODE OF INTERSTATE HOLIDAY

TRAVEL

<u>Holiday</u> <u>Expenditure</u>	<u>Air</u> <u>Total</u>	<u>Sea</u> <u>without</u> <u>vehicle</u>	<u>Sea</u> <u>with</u> <u>vehicle</u>
<u>\$</u>	<u>%</u>	<u>%</u>	<u>%</u>
0-500	85.6	10.7	5.7
500-1000	89.1	3.8	7.1
1000-1500	86.4	3.2	10.4
1500-2000	79.6	-	20.4
2000-2500	88.8	-	11.2
2500-3000	88.7	-	11.3
3000 plus	88.5	0.7	10.8

Note: Holiday expenditure figures are not deflated.

HOLIDAY TRAVEL BY TASMANIANS

The other factor that would influence the transport mode used for a holiday is the composition of the household. This is shown in Table 8 below.

TABLE 8 : EFFECT OF HOUSEHOLD TYPE ON MODE OF INTERSTATE TRAVEL

Household Type	Air	Air	Sea	Sea
	(without vehicle)	(with vehicle)	(without vehicle)	(with vehicle)
Single	87.3	0.4	4.0	7.0
Married couple no children	82.0	1.8	3.8	10.3
Married couple with children	75.4	2.4	1.5	16.2
Single parent with children	88.3	-	5.7	3.7
Other	88.6	-	-	11.4
Overall Average	82.1	1.5	3.3	10.6

Single people and single parents with children use air to an above average degree while married couples with families are much more likely to use sea transport. This confirms the accepted travel industry view that sea transport is more often used by families as a means of transport. Interestingly, single parent families are much less likely to use the ferry although the relatively high proportion of this category travelling without a vehicle may reflect the generally low income of this group.

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Use of Discount Fares

Only 37.9 per cent of holiday tripmakers pay full fare. The propensity to travel full fare or discount is strongly influenced by the type of household. Naturally, families with children frequently take advantage of child and student concessions. Discount fares such as APEX and standby are consistently used by all household types and are used for rather more than a quarter of all holiday travel. Holiday packages are surprisingly less popular, averaging only 8 per cent of trips.

TABLE 9 : USE OF DISCOUNT FARES BY HOUSEHOLD TYPE

	Single	Married Couple	MC + Children	Single + Children	Population Average
Discount air	25.4	31.2	24.2	27.9	27.5
Holiday package	7.8	9.2	7.3	4.3	7.8
Child/student	1.1	-	25.0	25.1	10.5
Pensioner	8.7	7.1	1.3	4.3	5.3
Employer Subsidy	0.5	3.7	4.3	3.4	3.2
Other	2.7	2.2	1.1	1.8	1.9
Discount + child	-	-	11.8	13.7	5.1
Discount + subsidy	0.5	1.2	-	-	0.6
No Discount	53.4	45.5	24.4	18.6	37.9

HOLIDAY TRAVEL BY TASMANIANS

Type of Accommodation

Respondents were asked what sort of accommodation they used for their holiday. Income was found to be a less important factor than the composition of the household.

Single people understandably were more likely to stay with friends or relatives while married couples without children showed a marked preference for staying in hotels. Married couples with children favoured holiday units, flats, and caravans (both mobile and in parks). Single parent families, however, most often stayed with friends or relatives, perhaps because of their low income.

The effect of household composition on the choice of accommodation is shown in more detail in Tables 10 and 11. One interesting point is that while the proportions differ, the behavioural pattern for interstate and intrastate travellers is similar.

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TABLE 10 : TYPE OF ACCOMMODATION USED IN TASMANIA BY HOUSEHOLD TYPE

Type of Accommodation	Single	Married Couple	MC + Children	Single + Children	Population Average
Hotel/Motel	22.1	30.0	12.6	8.2	19.6
Holiday Unit/Flat	10.8	13.2	17.3	13.7	14.8
Shack	4.3	10.6	14.9	8.6	11.6
Caravan in park	7.0	11.7	15.0	16.7	13.1
Camping site	9.3	5.8	6.8	6.5	6.9
Caravan/Campervan	0.9	8.6	9.8	3.6	7.6
Friends or Relatives	42.0	18.2	21.4	39.0	24.3
Other	3.7	1.8	2.1	1.4	2.1

TABLE 11 : TYPE OF ACCOMMODATION USED INTERSTATE OR OVERSEAS BY
HOUSEHOLD TYPE

Type of Accommodation	Single	Married Couple	MC + Children	Single + Children	Population Average
Hotel/Motel	28.1	40.0	28.5	24.7	32.7
Holiday Unit/Flat	5.2	9.0	13.8	4.5	8.9
Shack	0.5	0.2	-	1.2	0.3
Caravan in Park	4.2	5.2	9.1	2.3	5.7
Camping Site	1.3	0.9	1.3	-	1.0
Caravan/Camper Van	0.6	1.1	4.4	-	2.2
Friends or Relatives	57.9	40.2	44.8	63.8	46.5
Other	2.2	2.6	2.4	3.6	2.6

HOLIDAY TRAVEL BY TASMANIANS

NON HOLIDAY MAKERS

Perhaps the most interesting results from the survey are about those who have not had a holiday in the past three years.

From the survey it is estimated that some 44,000 households in Tasmania, 31.6% of the total, have not taken a family holiday in the past three years. The respondents cited as definite problems the cost of fares (55.7%), cost of accommodation (44.0%) and cost of travel on the mainland (31.4%).

As has already been discussed, income has a big influence on holiday behaviour. This was shown in Table 3. This is reflected in the replies given by non holidaymakers shown in Table 12 on the problems of interstate holiday travel.

**TABLE 12 : PROBLEMS IN TAKING INTERSTATE HOLIDAYS -
THOSE WHO PERCEIVED A VERY DEFINITE PROBLEM**

Household Income	Proportion of Households	Cost of Fares to Mainland	Cost of Accommodation	Cost of Travel on Mainland
0- 5,000	11.4	61.5	55.2	35.1
5-10,000	21.2	62.1	51.4	43.4
10-15,000	12.6	58.6	45.4	27.5
15-20,000	16.8	57.3	40.6	28.6
20-25,000	11.8	40.7	29.7	19.6
25-30,000	10.6	20.6	14.0	3.6
30,000 plus	9.5	60.2	18.9	5.9

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The effect of household composition has less impact on preventing holiday travel. Some categories such as single parent families reported fares, accommodation and the cost of travel to be definite problems, but this probably reflects their generally low income rather than any household constraints. Table 13 details the effect of household commitments on non travellers.

TABLE 13 : EFFECT OF HOUSEHOLD COMMITMENTS ON THOSE WHO DO NOT TRAVEL

	<u>Household Commitments</u>	
	<u>Can be a problem</u>	<u>Very definitely a problem</u>
Person Living Alone	6.8	11.1
Married Couple Only	10.8	25.4
MC Child(ren) 15 +	17.7	19.2
MC Child(ren) 0-14	20.4	17.6
MC Child(ren) 0-14,15 +	29.6	22.0
Single Child(ren) 15 +	19.5	19.9
Single Child(ren) 0-14	11.8	15.3
Single Child(ren) 0-14, 15 +	7.1	23.8
Other Households	20.5	18.8

HOLIDAY TRAVEL BY TASMANIANS

When asked specifically about household commitments, there was only limited evidence that household commitments acted as a restraint on holiday travel. The survey showed that household commitments caused difficulty to about twenty per cent of single person households and to about forty per cent in other categories. The only exception being married couples with children around the teens of whom 51.6% cited household commitments as being an impediment to taking family holidays.

FURTHER WORK

This report is a preliminary outline of the results of the household survey. It shows that the survey contains detailed information on the holiday travel behaviour of Tasmanians that, given suitable analysis, will be of great benefit to the Tasmanian travel industry.

The next step is to use the survey data to estimate the demand for holiday travel both within Tasmania and interstate. This will give a more precise indication of the effect of the parameters that affect travel behaviour. The survey data lends itself to the use of individual choice models such as multinomial logit. These models can also be used to examine in detail the reasons why some Tasmanians choose not to holiday at all and to explore the quantitative impact of economic and social variables on holiday travel.

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