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SEASONALITY IN THE TOURISM INDUSTRY

Impacts and Strategies



*Christine Lee, Sue Bergin-Seers, Graeme Galloway,
Barry O'Mahony and Adela McMurray*

Technical Reports

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ABSTRACT

Seasonality is a concept that is well studied and documented in the tourism literature. Being ubiquitous, all tourism enterprises and regions are impacted by seasonality whether severely or mildly. Seasonality causes the fluctuation in tourists and visitor numbers to a destination. Therefore, some destinations at certain times have more tourists and visitors than they are able to accommodate, while at other times, there are too few tourists and visitors to the region. Although, seasonality is widely perceived in a negative light because its effects are linked with a reduction of tourist dollars, not all effects of tourism are negative.

There are many strategies that are used to address the effects of seasonality. These include pricing strategies, diversifying the attraction, market diversification and seeking assistance from the government and industry bodies. Increasing the length of the tourist season and modifying the timing to school holidays are other strategies. At enterprise level, additional strategies include the recruitment of temporary staff. With the range of available strategies for addressing the effects of seasonality, the selection and adoption of a strategy should be in line with the strategic plan of the enterprise or the destination for an effective result. In today's environment, such decision making would need to include and consider social and environmental factors in addition to economic ones.

Although many strategies can be transferable from one industry to another, more detailed research is necessary to investigate the individual strategies in relation to the industry and the impact of these strategies on the different stakeholders and the environment at the destination.

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SUMMARY

This report examines the concept of seasonality, with a focus on Australia. Seasonality presents a number of issues that require special attention and strategies. In particular, seasonality affects the number of tourists to a region and therefore can threaten the viability of businesses in a region. For example, seasonality can place great pressure on remote or isolated tourism enterprises to staff their business with available and appropriate staff, far more so than for enterprises located in more populated areas.

The outcome of the project provides a number of strategies to assist tourism agencies and enterprises in the management of tourism activity for improved economic and social returns. In particular, this project provides a range of strategies that have been used at the destination and enterprise levels to ameliorate the effects of seasonality. In addition, this project draws attention to other factors that need to be considered before any strategies can be adopted and applied successfully.

Objectives of Study

The key objectives of the study were to:

- Provide a general overview of seasonality;
- Identify strategies that may be useful for destinations and enterprises to manage the impact of seasonality; and
- Evaluate the usefulness and effectiveness of some of these strategies for remote regions in particular.

Methodology

Firstly, the academic literature was utilised to explain and evaluate the dimensions of seasonality. A range of strategies, derived from the literature, were identified and selected for further study of the industry. In the next phase, the industry documents comprising industry reports and plans were evaluated for these strategies for use at a macro level. Following this, a number of semi-structured interviews were conducted with tourism stakeholders to determine the usefulness and use of these strategies at both the destination and enterprise levels.

Key Findings

There are many strategies that are used to address the effects of seasonality. At both the destination and enterprise levels, there are several general strategies that are used, including:

- Pricing, such as seasonal price variation; pricing to attract a target market;
- Diversifying the attraction – e.g. introduction of special events and development of incentives for a particular target market;
- Market diversification – e.g. target different markets for different seasons; and
- Facilitation by the state (government or tourism agencies).

These strategies are utilised at a macro or destination level in Australia despite the diversity and differences between the states in the country. From the interviews, these strategies are also used at enterprise and operator levels. However, individual operators may or may not choose to use certain strategies depending on their location, sector and product.

There are a number of strategies which can only be developed and implemented with state and local government or regional and local tourism organisation involvement. These strategies are classified under the *facilitation by state* grouping. The destination or regionally focused strategies address the broader and more costly issues of infrastructure (roads, signage, amenities, air services), marketing (e.g. branding) and promotion, and developing new attractions and venues. A number of destination type strategies require partnerships with the private sector (including tourism enterprises). For example, government working with event organisers to bid for and manage events to provide a year round spread of activities or to bring together a range of businesses to develop a tactical branding campaign for the region.

The areas of greatest concern in relation to the impact of seasonality are:

- The ability of tourism enterprises to individually overcome the problems associated with large swings in seasonal demand;
- The ability of the local destination to provide infrastructure to handle the substantial swings in demand; and
- The desire for collaboration between tourism enterprises with destination and state agencies.

Although the range of general strategies for addressing seasonality has not changed much over the years, in today's environment, there are other factors that will impact on the success or failure of adopting any of these strategies. Therefore, it is vitally important to consider these when selecting the type of strategy to adopt. This is especially so for rural environments because of the severity of the impact of a bad decision. Such decision making should include and consider social and environmental factors in addition to economic ones.

Future Action

Although many strategies are transferable from one industry to another, more detailed research is necessary to investigate the individual strategies in relation to the industry and the impact of these strategies on the different stakeholders and environments at the destinations. Community consultation is important, especially in rural regions where the impact of seasonality can be more severe. In particular, environmental and social factors should be included in the economic decision processes in relation to seasonality.

Chapter 1

INTRODUCTION

Seasonality presents a number of issues that require special attention and strategies. In particular, seasonality affects the number of tourists to a region and therefore can threaten the viability of businesses in a region. For example, seasonality can place great pressure on tourism enterprises to staff their business with available and appropriate staff, far more so than for enterprises located in more populated areas.

This project focuses on the impact that seasonality has on the tourism industry, especially those enterprises and destinations located in remote or isolated regions. Key to this study was the identification of strategies for the effective management of the impacts of seasonality on a destination and its enterprises. These strategies were sourced from both national and local locations. These strategies may be useful for 1) tourism enterprises and 2) local tourism destination agencies to provide infrastructure and support to handle the substantial swings in demand.

The research was undertaken in three phases. Phase 1 involved a search of the literature and secondary industry data on the topic of seasonality. The information collected provided a summary of the dimensions of seasonality relevant to tourism and tourism enterprises and an overview of strategies for further evaluation. This phase resulted in a classification framework for strategies to address seasonality issues. These classifications were then used in Phase 2 to guide the collection of documentary information from state and regional tourism organisations across Australia and to explore how particular destinations have addressed seasonality and its impacts on visitation and business viability. In Phase 3, a close examination of enterprises operating in mountain tourism and the wine tourism assisted in understanding the effectiveness of particular strategies and their relevance to specific settings.

Figure 1 is a pictorial representation of the structure and content of the report. Firstly, the academic literature is analysed to determine a range of causes and impacts of seasonality and the strategies employed to address these issues. The critical review then formed the basis of a search and examination of industry documents developed by tourism destination agencies. These documents were largely tourism strategies for the local area or the state, which were explored to identify both destination- and enterprise-related strategies. This was followed by several semi-structured interviews with stakeholders to more closely examine the strategies employed by individual enterprises. Finally, these findings were discussed to determine how these strategies can be utilised successfully in today's environment.

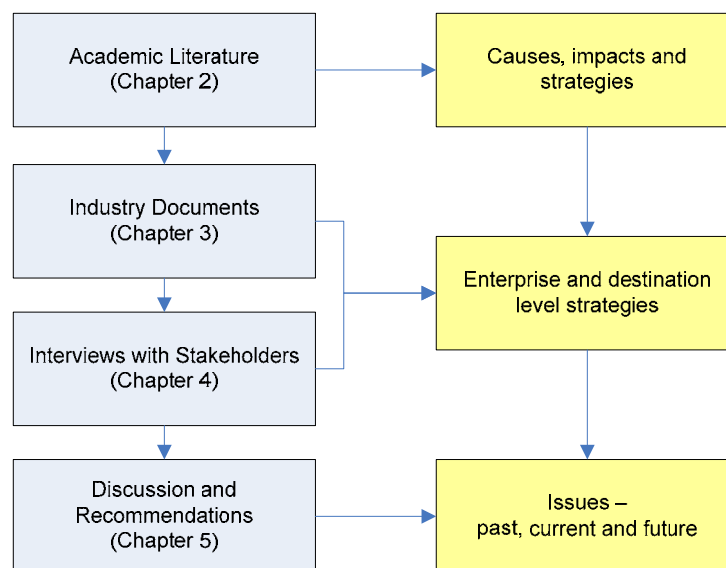


Figure 1: Flow diagram of the structure and content of this report

Chapter 2

LITERATURE REVIEW

Introduction

Seasonality and its related social, economic and environmental impacts is a major issue for the tourism industry. Academic focus within the literature has approached the problem from a variety of perspectives and, as such, seasonality is generally defined depending on the context from which it is studied, that is, hospitality, tourism or leisure. Commons and Page (2001), for example, suggest that seasonality is inextricably linked to tourism and the fact that tourism flows are determined by both transitory and seasonal nature factors. Manning and Powers (1984) capture the essence of the problem in the following quote explaining seasonality and its negative impacts:

Uneven distribution of use over time (peaking) is one of the most pervasive problems with outdoor recreation and tourism, causing inefficient resource use, loss of profit potential, strain on social and ecological carrying capacities, and administrative scheduling difficulties. (p.25)

Manning and Powers (1984) are concerned that facilities and services may be underutilised, however, they also note the implications of facility overuse, suggesting that destinations and operators can face continual inefficiency as they grapple with the peaks and troughs of demand.

Previous attempts to address seasonality impacts have been complicated by the diverse range of causes and its effects across different locations. For example, seasonality can place immense pressure on remote or isolated tourism enterprises which often struggle to staff their businesses with available and appropriate staff, leaving them more vulnerable to lack of service consistency than enterprises located in more populated areas. Consequently, any strategies that have been employed to combat the negative effects of seasonality (as well as those used to enhance its positive impacts) may not be transferable across the industry.

As a result of these general findings, a comprehensive review of the literature to identify the causes and impacts of seasonality (with particular emphasis on those enterprises located in remote or isolated regions) was the first step in this project.

Influencing Factors

Seasonality has been studied in a number of ways; however, the concept relating to tourism activities is largely a temporal and spatial issue. In the context of tourism, it is usually expressed in both monetary terms (social and capital costs) and visitor (or customer) numbers (Jang 2004). One of the most comprehensive studies of the factors influencing seasonality in tourism is the work of Butler and Mao (1997). Their work is supported by other researchers who identify a number of similar dimensions of seasonality and present a variety of prescriptions for alleviating the negative impacts of seasonality. According to Butler and Mao (1997), seasonality has two dimensions: natural (physical) and institutional (social and cultural), involving both the origin and destination regions. These are shown in Figure 2 below. Natural seasonality relates to temporal variations in natural phenomena (for example, rainfall, sunlight, temperature, snowfall) of which the implications for certain forms of tourism demand are easily understood. For example, water-orientated tourism activities require a warm temperature whilst snow skiing requires low temperatures and an abundance of snow (Butler & Mao 1997).

Institutionalised seasonality is more complex as it is based on human behaviour and consumer decision-making (e.g. deciding on the timing of holidays). With regard to the spatial issue, the *generating area* (i.e. place of visitor origin and market demand), various changes in natural phenomena influence visitors' travel decisions. For instance, most people choose to travel in warm, dry seasons, hence the popularity of summer vacations. Religious, cultural and social factors also dictate when people travel, with one or more of these dimensions often determining the timing of holidays.

Temporal variations in natural phenomena also affect destinations (or *receiving areas*). The receiving area is the location of the suppliers of tourism activity. Climate, for example, can determine the types of tourist attractions within a destination. On the other hand, the cultural, religious, ethnic and social activities in a destination influence the type and number of visitors. Examples of this are visits by religious followers to sacred sites such as Mecca and Lourdes, as well as visits by sports fans to major sporting events around the world. In America, for instance, the Superbowl draws baseball fans from across the continent; while in Europe and South America, the (soccer) World Cup attracts thousands of supporters, and in Australia cricket, rugby league and Australian Rules football are enthusiastically supported.

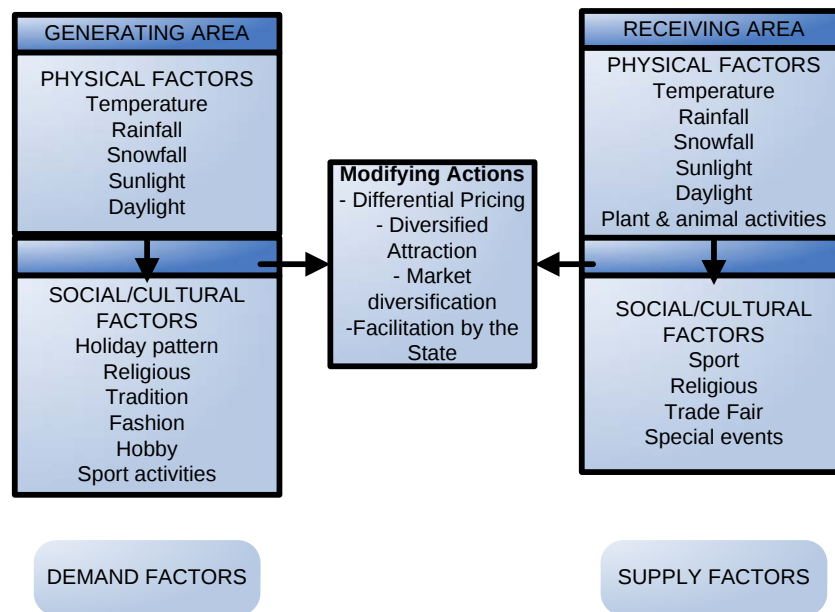


Figure 2: Factors of seasonality in tourism

Source: Modification of the Butler and Mao (1997) model

It should be noted at this stage, however, that it is urban destinations that, more often than not, reap the benefits of sport-related tourism. In other words, because urban destinations are recipients of business tourism, are widely serviced by transportation links and have a larger pool of appropriately trained human resources at their disposal, they are perceived to be less vulnerable to the effects of seasonality than regional areas (Butler & Mao 1997; Bond 1996; Witt & Moutinho 1995).

Although Figure 2 suitably describes the factors influencing seasonality, the profiled dimensions do not fully explain the overall multidimensional nature of the phenomenon. The reason is that the factors that influence seasonality in tourism are interrelated and the interactions between them are quite complex. This is important because, essentially, it is the complexity of the interactions between the generating and receiving areas (as well as competition between destinations) that industry attempts to manage. Management of seasonality via the implementation of modifying strategies is indicated by the *modifying actions* of differential pricing; diversified attraction; market diversification strategies (Butler & Mao 1997) and facilitation by the state (Commons & Page 2001). It is these modifying actions (or management strategies) that are the focus of this study. Prior to discussing strategies that might be used to ameliorate the negative effects of seasonality, however, it is important to provide details on the causes and impacts of seasonality and their relevance to both enterprises and destinations in order to set the context of this study.

Causes and Impacts

As previously noted, it is widely accepted that the causes of seasonality fall into either of two types: 'natural' or 'institutional' (BarOn 1975; Commons & Page 2001; Goulding, Baum & Morrison 2004). Before proceeding to a more detailed examination of these two dimensions, however, it should be noted that seasonality does not refer to occasional irregularities within tourism, but instead is concerned with the seasonal patterns that are stable and well-established (Witt & Moutinho 1995). The causes, therefore, do not include those factors that are related to operations issues such as poor management, for example; nor to short term fluctuations in visitation caused by tourism shocks; or crises such as increased fuel prices, SARS, unanticipated natural disasters, or incidents of terrorism.

Natural Causes

This category refers to variations in natural phenomena such as the climate, weather and seasons of the year. Variables include cycles or differences in temperature, hours of sunlight, levels of rainfall and snowfall. These variations mean that tourist regions have different seasonal potential and resources and thus are perceived to have particular seasonal qualities (Hartmann 1986). Although natural factors can make a destination unattractive to particular markets, they are not the sole reason for variations in tourism demand (Baum & Hagen 1997).

Institutional Causes

Other causes of seasonality in tourism demand are institutional. Institutional seasonality is primarily linked to the following three factors: holidays (school/university and public/religious) and the availability of leisure time; travel habits and motivations (which are affected by changing tastes, social pressure and fashion), and the hosting and timing of events. These events may be leisure or business focused and either major or minor.

To better understand the extent of the causes of seasonality, a summary of both the natural and institutional causes of seasonality, as drawn from the literature, is presented in Table 1.

Table 1: Causes of seasonality

Natural	
Commons & Page (2001); Baum & Hagen (1997)	Weather (e.g. access problems due to snow blocking roads, rain affecting beach activities)
Commons & Page (2001); Goulding, Baum & Morrison (2004)	Climate (hours of daylight, temperature in destination area)
Commons & Page (2001)	Geographic location – coastal, alpine, urban, peripheral regions
Institutional/Cultural	
Goulding, Baum & Morrison (2004)	Holidays (School holidays) Public/religious events (Christmas, Easter)
Commons & Page (2001)	Availability of leisure time
Commons & Page (2001)	Health of the economy affecting travel expenditure
Commons & Page (2001); Goulding, Baum & Morrison (2004); Jang (2004)	Changing travel habits, tastes, motivations (often due to tradition, inertia, social pressure, fashion)
Goulding, Baum & Morrison (2004)	Need for maintenance of resources or rejuvenation of the environment
Jang (2004)	Sporting season (e.g. snow skiing or surfing)
Commons & Page (2001)	Proximity to capitals cities
Goulding, Baum & Morrison (2004)	Competition from other sectors
Goulding, Baum & Morrison (2004)	Alternative use of touristic resources
Goulding, Baum & Morrison (2004)	Activity opportunities
Goulding, Baum & Morrison (2004)	Physical attractions
Goulding, Baum & Morrison (2004)	Licensing restrictions
Goulding, Baum & Morrison (2004)	Tourism business operated as secondary source of income – or lifestyle approach
Goulding, Baum & Morrison (2004)	Trading patterns of other businesses

Impacts and Implications: Cost and Benefits

The impacts and implications have been explored from both the supply-side (i.e. tourism operators, employees and residents of the destination locale) and the demand-side (i.e. tourists) perspectives of seasonality. As the previous section has shown, the causes of seasonality are often out of the control of tourism operators, although this is not always the case (Witt & Moutinho 1995; Butler 2001). Whilst there is research that suggests there are benefits to running a business on a seasonal basis (Drakatos 1987; Hartman 1986; Goulding, Baum & Morrison 2004), the incidence of seasonal trading remains an overriding concern, especially in relation to public policy and regional economic development. The responses to seasonal impacts are generally focused on three areas – employment, costs and facilities, however, an additional area, environmental protection and safety was later noted by Witt and Moutinho (1995) and by Hartmann (1986), who maintains that ‘dead seasons are the only chance for the social and ecological environment to recover’ (p.31). Further benefits are presented by Mourduokoutas (1988), who proposes that some seasonal workers regard the lack of employment during low season as beneficial.

A summary of the impacts of seasonality, both as costs and benefits to the supply side and the demand side, is presented in Table 2. The supply side includes business owner-managers (O-M), suppliers, employees and local residents, whilst the demand side refers to tourists or visitors to the area.

Table 2: Impacts and implications of seasonality

SUPPLY SIDE		TYPE OF IMPACT
Costs		
Commons & Page (2001)	Increased prices during peak season (placing pressure on goods and transport in the area and increasing supply costs for the enterprise)	Cost
Commons & Page (2001)	Budget management/cash flow	Cost
Commons & Page (2001); Goulding, Baum & Morrison (2004); Jang (2004)	Instability in income/return on investment (O-M) leading to high risk for O-M, investor and region	Cost
Goulding, Baum & Morrison (2004)	High-season income must cover annual fixed costs	Cost
Mourdoukoutas, (1988); Ball (1988); Krakover (2000)	Cost of seasonal recruiting	Cost
Facilities		
Commons & Page (2001); Jang (2004)	The under- or over-utilisation of resources	Cost
Commons & Page (2001)	Perishability of product – not able to stockpile the product or service	Cost
Commons & Page (2001)	Pressures on transport system and other infrastructure during peak periods	Cost
Employment		
Commons & Page (2001); Goulding, Baum & Morrison (2004)	Sporadic demand for labour inhibits the recruitment process: - shortages of seasonal workers led to seeking workers beyond local area - high recruitment costs reduce remuneration packages	Cost
Commons & Page (2001); Goulding, Baum & Morrison (2004); Jang (2004); Krakover (2000)	Sporadic demand for labour affects the retention and development of employees results in: - loss of skill and experience - lack of training and career opportunities - service quality inconsistency and reduced customer satisfaction - lack of commitment by workers - unhealthy fluctuations	Cost
Commons & Page (2001)	Seasonal operation provides O-M with down time or post-season recuperation; particularly apt for lifestyle and family-based firms	Benefit
Krakover (2000); Witt & Moutinho (1995)	Seasonal work provides needed casual and part-time work (or additional income) to locals and others	Benefit
Environmental Protection and Safety		
Witt & Moutinho (1995)	Gives environmental resources a post-season recovery	Benefit
Butler (2001)	Crowding in peak season causing environmental pollution and increase risk of terrorism	Cost
DEMAND SIDE		
Jang (2004)	High prices – cost spreading (making tourists in peak season pay for low income in low season)	Cost
Jang (2004)	Crowding (hard to obtain quality and satisfaction)	Cost
Jang (2004)	Peak crowds may increase vulnerability to safety and threats (e.g. terrorism)	Cost
Krakover (2000)	Reduced availability of accommodation	Cost
Commons & Page (2001)	Pressures on transport system and infrastructure	Cost

The summary of impacts in Table 2 highlights a number of important points. Firstly, the desirability of a year-round economy based on tourism visitation is not necessarily a given. Although in many instances the economic rationale of year-round activity (e.g. the efficient utilisation of capital resources) predominates seasonal optimisation on environmental and social grounds (Commons & Page 2001), for some communities the protection of a lifestyle and the environment itself is equally or more important. Some operators, for example, achieve their lifestyle aspirations by taking advantage of a seasonal trading pattern followed by downtime or recuperation. In addition, the benefits of seasonal down time to fragile environmental resources, in terms of post-season recovery, further emphasise the positive aspects of seasonality (Hartman 1986; Manning & Powers 1984).

Overall, the type of impact that seasonality has on tourism very much depends on the nature of the tourism product and the temporal characteristics of the destination.

Management Strategies

As noted earlier, seasonality is concerned with the patterns that are stable and well-established rather than occasional irregularities (Witt & Moutinho 1995). As there is an element of predictability associated with seasonality it is possible for managers to anticipate many of its impacts and to implement strategies to adjust to any negative effects (Getz & Nilsson 2004). Hartmann (1986) and Phelps (1988) suggest that strategists could approach seasonality according to a firm's resource function. That is to say, the demand for either winter or summer operations depends on the nature of facilities offered. This approach is now viewed as too simplistic, with the emergence of more recent work that suggests that management strategies ought to focus on a number of key areas: facilities, employment, costs and the environment. These strategies have been classified in various ways and the best-fit strategy should be selected based on a number of dimensions of the supply-side dynamics. Getz, Carlsen and Morrison (2004) discuss the issue of seasonality in family businesses. They highlight that family firm's attempt to address seasonality by adopting one of three strategies – coping, combating or capitulating, however, they did not consider the broader complexities beyond the family situation. Witt and Moutinho (1995) state, for example, that the most commonly advocated strategies include variations in the product mix, diversifying the market, price differentials and state-initiated measures. Baum and Hagen (1997) suggest four main forms of initiatives to counter seasonality in peripheral or regional locations: events and festivals; market diversification; product diversification; and structural and environmental responses (note that structural and environmental responses can be compared to government action or 'facilitation by the state'). These initiatives are similar to the *modifying actions*, illustrated in Figure 2. Butler (2001), on the other hand, presents management strategies as differential pricing and taxation, new attractions and events, and market diversification. Given that events and festivals can be included in product and market diversification, and structural and environmental responses are usually initiatives facilitated by the state, for the purposes of this study the researchers have chosen to emphasise four main strategy types, as presented in Table 3.

Table 3: Strategies for addressing seasonality impacts

CITED IN	STRATEGY	ISSUE ADDRESSED
1. Differential Pricing		
Commons &Page (2001); Jang (2004); Jeffrey & Barden (1999); Witt & Moutinho (1995)	Seasonal (or promotional) pricing (e.g. discount or free offers – see wotif.com)	Increasing visitation in low periods. Increasing length of stay. Increasing yield. High prices to decrease congestion in peak season.
Jeffrey & Barden (1999)	Group booking offers (e.g. retirees)	Increasing visitation in low periods.
Jeffrey & Barden (1999)	Financial planning and budgeting to manage fluctuating operational costs (employees and other resources) based on cyclical trends	Inability to control fluctuating seasonal costs.
Butler (2001)	Closure of business in off-peak season	Reduction of operational costs.
2. Diversified Attraction (changing the product mix)		
Goulding, Baum & Morrison (2004); Witt & Moutinho (1995)	Introduction or development of festivals and events	Increasing visitation in low periods.
Goulding, Baum & Morrison (2004)	Development of the local environment (access to restricted natural attractions)	Increasing visitation in low periods.
Goulding, Baum & Morrison (2004);	Facility or structural development (e.g. public transport, public amenities)	Increasing visitation in low periods.

Goulding, Baum & Morrison (2004)	Service level differentiation (reducing opening times in low season)	Reducing costs, increasing yield. Meeting customer needs.
Goulding, Baum & Morrison (2004); Jeffrey & Barden (1999)	Offering complementary services or themed offers (e.g. combining tourist facility with local amenities – motel with coffee shops or retail outlets)	Expanding operational season (reducing seasonal closures).
Jeffrey & Barden (1999)	Offering off-season holiday package	To provide an incentive to stay in off-season.
Jang (2004); Jeffrey & Barden (1999); Witt & Moutinho (1995)	Diversifying into niche product or service areas (e.g. identifying and matching seasonal motivation with product/service or local attraction).	Attracting a different market.
Jang (2004)	Diversifying to increase local customers	Increasing business in low periods.
3. Market Diversification		
Witt & Moutinho (1995)	Marketing campaigns to attract different markets in different seasons (a multi-segment approach)	Flattening of seasonal peaks and troughs.
Jang (2004)	Determination of the optimal segment mix (e.g. financial portfolio theory)	Increasing yield (reducing costs and increasing income).
Jeffrey & Barden (1999)	Align with tour operators or travel agents to sell product/service	Increasing business in low periods and increasing market penetration.
4. Facilitation by the state		
Witt & Moutinho (1995); Goulding, Baum & Morrison (2004)	Staggering of holidays over a longer period	Flattening of seasonal peaks and troughs.
Goulding, Baum & Morrison (2004); Krakover (2001); Witt & Moutinho (1995)	Initiatives to increase the labour market and to encourage labour force flexibility (e.g. relaxing regulations on work visas for seasonal work or training incentives)	Lack of seasonal workers.
Goulding, Baum & Morrison (2004)	Provision of business support services (marketing, financial planning)	Cash flow and other financial problems.
Witt & Moutinho (1995); Baum & Hagen (1999)	Provision of loans or subsidies by government to develop product or local services	Improving the business or destination to increase tourism.
Witt & Moutinho (1995)	Provision of tax concession (e.g. on the price of fuel)	Encouraging travel to remote areas.
Goulding, Baum & Morrison (2004); Witt & Moutinho (1995)	Environmental regeneration initiatives	Damage to local environment during peak periods.
Goulding, Baum & Morrison (2004)	Support off-season community initiatives (e.g. local arts festivals)	Reduced trade for local businesses.
Goulding, Baum & Morrison (2004)	Improved and expanded regional infrastructure	Greater access to rural or remote areas during both high and low seasons.
Baum & Hagen (1997); Goulding, Baum & Morrison (2004)	Development of local business networks and partnerships	Provision of greater marketing resources and support for infrastructure development.

Essentially, the strategies employed by a firm or a destination should consider the causes and their impacts. Some of these causes may be due to a mindset and fixed perceptions about the tourism marketplace. For example, a better understanding of market segmentation and the motivations of tourists can assist in the development of a product or marketing approach that will encourage greater visitation during the low season (Baum & Hagen 1999). As the causes of seasonality vary from location to location, it is the response by managers and tourism agencies to these causes that is the key focus of strategy development. Major structural or institutional responses can also be considered, although these are generally difficult to introduce. Examples from the literature include fuel related tax concessions, government loans and a French initiative in the 1980s that encouraged several industries to stagger holidays over a longer period. Although these state-initiated measures are generally deemed successful, they should be weighed up against the difficulty of making ‘an appreciable difference to the temporal distribution of tourism’ (Witt & Moutinho 1995).

Conclusion

The review of the seasonality literature has attempted to capture both its complexity and its widespread impact on tourism. Figure 2 illustrated the multiple dimensions of seasonality and their interconnectedness. Furthermore, it is apparent that both natural and institutionalised causes of seasonality exist. The implications of these causes can affect both the demand and supply of tourism in positive and negative ways. Given the somewhat predictable nature of seasonality, managers have been able to employ strategies to alter the affects of seasonality to their own advantage. These strategies are aimed not only at the enterprise but have been more widely employed at the destination level.

The development and implementation of strategies to address seasonality issues is the focus of this study. A great deal can be learnt from what others have done in this area. To expand and implement this knowledge to a different context (i.e. across different geographical locations around Australia), a closer analysis of these strategies is needed. Explorations of good practice are important to understanding the transferability issues. At this stage, however, it is not known whether strategies are transferable from one enterprise or destination to another; whether these strategies continue to have an impact over a long period; or whether seasonality-related strategies merely shift the problem to another space or time. The key question then is *under what circumstances and to what extent can strategies that are effective in one place be transferred to another?* To answer this question further study of strategies, enterprises and destinations across Australia was undertaken and reported in Chapters 3, 4 and 5.

Chapter 3

MACRO PICTURE – AUSTRALIA

This chapter explores and analyses information obtained from relevant state and territory government tourism organisations to investigate the strategies and approaches planned and implemented to ameliorate the effects of seasonality. In particular, state and territory tourism organisations in Australia were asked to identify the key documents they produced to deal with the impact of seasonality at both the destination and enterprise levels.

Method

To ensure all key strategies were identified, a thorough search of websites for state and regional tourism organisations in Australia was initially undertaken. This was followed up by phone contact with representatives from the relevant government tourism organisations in each state and territory. The sources for strategies are listed in Appendix A.

Summaries of the seasonality-related strategies collected are presented in Table 4 and Appendices B, C and D. These summaries provide the strategy type, the specific strategy, the issues addressed and the source of each strategy. To classify the strategy type, the four major headings found within the review of literature (see Table 3) were used. The four strategy types were: *differential pricing*; *diversified attraction*; *market diversification*; and *facilitation by the state*, which includes structural and environmental responses. A summary analysis of the findings is presented below, which highlights the transferability of the strategies to other settings as well as the gaps in the information. It is important to keep in mind that the lists in Table 4 and Appendices B, C and D (are not an exhaustive as they summarise only those publications which are either readily available to the public (e.g. over the internet or by contact with government departments) and/or that were identified by the personnel contacted as being relevant to the issue of seasonality.

Table 4: Strategy: differential pricing

STRATEGY TYPE	SPECIFIC STRATEGY	ISSUE ADDRESSED	SOURCE	TRANSFERABLE TO
1. Differential Pricing				
Offer uniqueness not discounts	Develop and sell a unique winter experience rather than discount (heavy discounting devalues the destination).	Attracting visitors who will provide a greater yield.	Tourism Tasmania – Winter Challenge 21	Products or destinations with unique offerings
Work at getting the ‘right’ package price	Develop packages priced to the target market focused on providing a ‘different’ experience.	Optimising the yield by attracting visitors prepared to pay for a different experience.	Tourism Tasmania – Winter Challenge 21	Products or destinations with unique offerings

Broad Themes - The Types of Strategies and Issues They Address

Analysis of Table 4 and Appendices B to D indicates that many of the strategies employed by state and regional bodies are largely macro level initiatives which generally address a range of concerns and needs and not just seasonality-specific issues. In these instances, the reports or plans implicitly acknowledge and address seasonality in varying degrees. Interestingly, the strategies that are specific to the issue of seasonality are mainly driven by geographic location and climate concerns (i.e. seasonal weather changes). Such strategies are included in the Alpine Resorts Tourism Business Plan; Tourism Tasmania’s Winter Challenge 21 paper¹ and the Northern Territory Corporate Plan. For example, in the case of Tasmania, research found that potential visitors considered Tasmania a desirable destination only in the warmer months.

Evident in the analysis was the lack of strategies related to *differential pricing*, however, in a number of instances the strategies listed under the areas of *diversified attraction*, *market diversification* and *facilitation by state* were found as part of the states’ and territories’ overarching objectives addressing marketing, branding and sustainability. In other words, when seasonality is specifically referred to in the documents, it is usually

¹ The Tourism Tasmania paper is more of an issues paper, however, it does highlight possible future strategies.

mentioned in relation to destination position and promotion (e.g. NSW Tourism Masterplan). Finally, there was a general consensus amongst the organisations consulted that seasonality cannot be addressed in isolation, as many of the issues related to the problem are dependent on and interwoven with other non-seasonal strategies.

Differences and Similarities

In comparing the various state and territory government organisation strategies for tourism, a number of differences and similarities were apparent in their foci and related to geographic location, product type and industry sector.

Geographic locations

- Notably absent in the government reports / plans were enterprise level (or operational) solutions to address issues of rostering of staffing, budgeting and supplies.
- Despite the lack of enterprise operational actions, some of the strategies aimed at particular industries and destinations can be translated to the strategy development at the enterprise level.
- The Alpine regions and Kakadu National Park stand out as being unique and therefore have specific issues and strategies, however, some of these are transferable to other regional destinations.

Product types

The *products* or attractions mentioned in the various government strategies include festivals and events, skiing, holiday packages, backpacking activities, hot springs and spas, food and wine, niche accommodation, cultural and heritage sites, and park and trail touring. Of note is the strong focus on these products in particular in addressing seasonality. In summary:

- Festivals and events are used across a range of locations as a means of addressing seasonality.
- Developing niche products, such as wine and food, is common across various locations.
- Developing new products, such as natural and cultural attractions, to draw a new market and to encourage visitation in a low season.
- Expanding products via packaging (e.g. special occasion packages for accommodation and restaurants) to encourage greater visitation, repeat visitation or to lengthen stay in order to sustain and expand expenditure to compensate for low seasons.

Sectors

A number of the seasonality-related strategies are relevant to the following sectors:

- Accommodation
- Events
- Restaurants and cafes
- Resorts
- Cultural and heritage tourism

Despite the existence of sector-specific strategies, the focus on *packaging, touring and experiencing* and *educating* suggests that seasonality is best addressed across sectors and by combining a range of complimentary products.

Destination versus enterprise strategies

There are a number of strategies which can only be developed and implemented with state and local government or regional and local tourism organisations. These strategies are classified under the *facilitation by state* grouping. The destination or regionally focused strategies address the broader and more costly issues of:

- Infrastructure (roads, signage, amenities, air services);
- Marketing (e.g. Branding) and promotion; and
- Developing new attractions and venues.

A number of destination type strategies require partnerships with the private sector. For example, government working with event organisers to bid for and manage events to provide a year-round spread of activities or to bring together a range of businesses to develop a tactical branding campaign for the region.

Transferability and Application for a Range of Settings

The search of government tourism organisation tourism strategies has highlighted the lack of seasonality-specific documentation, however, although the strategies gathered were limited to state and territory government agencies, at the broader level, there is a surprising degree of transferability to different locations and situations. Yet it is also apparent that there is a lack of enterprise specific and operational related data about seasonality with regard to how operators deal with this issue on a day-to-day basis.

Given the gap in enterprise focused strategies it is essential to explore tourism operators and companies more closely to identify the strategies they employ to deal with the impact of seasonality. This exploration is detailed in Chapter 4.

Chapter 4

MICRO PICTURE – SELECTED CASES

Introduction

Following the academic literature review in Chapter 2 and the document analysis in Chapter 3, this chapter evaluates the identified strategies from the previous chapters through feedback from a number of tourism stakeholders within specific Victorian regions. The tourism stakeholders were consulted about their perspective on seasonality and the usefulness of the strategies in addressing seasonality issues. Industry representatives and tourism scholars, as well as some well-established business operators were sourced with the assistance of the industry reference group and via known contacts with the industry.

Method

In identifying enterprise operators informal feedback from industry personnel suggested particular destinations they believed were successfully addressing seasonality and its negative impacts on visitation and business viability. As a result of the consultation with industry, two key tourism areas were identified as being particularly affected by seasonality – wine tourism and mountain tourism. Therefore, operators and industry personnel in these sectors were targeted and information was obtained through telephone interview, email return of information based on the questionnaire provided, face-to-face discussions and web searches, as well as perusal of other written information if provided. The rationale for surveying a wide range of tourism industry stakeholders (industry representatives, industry operators, tourism scholars) is that in principle such respondents could provide a broad overview of activity in regard to seasonality that any one operator might not be able to give. As expected, the industry association stakeholder indicated that some of their comments were informed by knowledge about the activities of several individual operators. The investigations explored:

- a) Operator awareness of seasonality related strategies;
- b) Use of any of these strategies;
- c) Whether these strategies appeared to be sector or business specific or whether they have application to a broad range of businesses types and/or other locations; and
- d) The amount of state or industry support that they receive and what else could assist in dealing with the negative impacts of seasonality.

The results of nine interviews with various stakeholders are reported in the following section.

Wine Tourism

The wine tourism industry primarily derives its income from wine production. Therefore, at different times of the year, the operations are focused on the wine production processes which include growing, harvesting, processing, bottling, ageing and marketing their products. Those who have also positioned themselves as a tourist attraction are able to bring in additional income from wine tasting, cellar door sales and a range of other offerings. Ideally, the busy tourist time is the time that is slotted into the least busy time of the wine production cycle and during the ‘off-peak’ tourist season the winery would be busy with other aspects of wine production. When different vineyards located in the same region cooperate in the planning of their tourist events they can create a popular attraction that can bring regular visitors to the region.

Generally, winery operators have indicated that seasonality has both negative and positive impacts on wine tourism. Firstly, seasonal variations can provide opportunities for wine tourism operations and can be used as a selling point. A number of events are linked to particular seasons and are organised across wine regions. Examples include, cellar dwellers’ activities in July, and the Cabernet celebrations in October. Harvesting is a time for celebration and events and harvest dinners are prominent in the annual calendar. New releases are also tied to Spring and Summer activities – whites sell better in summer and in winter reds are highlighted. It was noted that ‘if every season was the same some marketing opportunities would be lost’. Local wine associations also play a key role in assisting individual wineries and regional areas. The introduction and marketing of events during quiet periods are important in increasing visitation numbers, although there is also an awareness that this can also have a negative affect with the potential that certain visitors might be deterred by crowded events. Although there are advantages to providing tourist products and services at times of the year when wine growing

processes are minimal, the highs and lows of the tourist season do not necessarily coincide with those of winegrowing. For instance, a winery whose low tourism season coincides with harvesting may not be able (or want to) develop events and/or promotions during this labour intensive time. For one particular winery, with the effects of holidays on visitor numbers excluded, tourist visitation is not too different across the different seasons. However, it is apparent that the location of the winery could be a more important factor than seasonality in its affect on visitation patterns. For instance, Yarra Valley, which is about a one hour from Melbourne, is more likely to have regular and greater numbers of visitors in comparison to more remote wineries. Wineries perceived as being less accessible from Melbourne find it difficult to develop a 'celebration of regionality' activity. This problem is also exacerbated by the distances between the regional wineries.

To address seasonality impacts a number of winery operators have employed a range of *market and attraction diversification strategies*. Until recently, visitors tended to visit just for the day, and did not stay overnight. Bed and breakfast accommodation was the main type available, however, the winery operators are now building resorts to attract a different and higher spend market. These resorts are now full every weekend. Operators are also trying to increase visitation during the week by attracting conferences.

Other wineries have developed restaurants in an attempt to make the winery a year-round attraction. Introduction of package tours for the luxury market also help and include chauffeur-driven tours of several wineries and meetings with the winery owners. These packages are attractive to international visitors.

With regard to pricing strategies, a number of owners have found little value in addressing seasonal issues with price variations. With the increase in the number of wine producers, cellar door discounting is seen to have negative affects on the long term viability of wineries. In fact, there is strong opposition to discounting of the product, with concern that such a practice could cheapen the product. Also, with discounting at the cellar door, wineries get no better deal than if they sold the wine through retailers. On the other hand, the offer of 'specials' is a more acceptable practice, as it is popular with the winery visitors.

Another issue is the seasonal nature of work in the wine tourism sector. Winery operators are often limited to employing staff on a casual and part-time basis. When staff are laid off at quiet times it is difficult to get them back. It is also difficult to get good staff and to pay a fair wage in this environment. Operators have indicated that government support for training seasonal workers would help. Some operators have addressed the seasonal impact on labour by employing a few full-time or regular workers across the year who are trained to be multi-skilled.

Finally, it appears that the size of the winery has a huge impact on the ability for operators to control the effects of seasonality, as does the available labour pool in a wine region. More marginal and peripheral areas struggle the most, underlining the importance of examining the effects of moderating variables as determinants of whether the impacts of seasonality are positive or negative. Therefore, another class of seasonality moderators within this sector includes individual difference variables, such as operator knowledge, wine region and winery location.

Mountain Tourism

Mountain tourism and its related adventure activities is largely reliant on the weather and regional climate. With operations dependent on the snow for skiing or good rainfall for whitewater rafting activities, tours can only take place at certain times of the year and if nature does not provide enough snow or water, then these activities are limited. However, there are ways to control or influence the environment. For example, with whitewater rafting, the release of additional water from the dam on strategic days to coincide with the days of operations can alleviate the lack of natural rainfall to maintain a reasonable amount of water downstream for such adventure activities. With modern technology, increasingly the fluctuations of weather and the demand for such activity have created a demand for artificial ski-slopes. Hence, there are situations that can be assisted by other parties (such as those with release of water from the dam) or can be solved with large capital inflow (artificial ski-slopes).

As with winery tourism, there are both positive and negative effects of seasonality for mountain tourism. For water rafting and canoeing operations, a positive affect is that mid-year school holidays tend to coincide with high water periods. Whereas the dry season (which affects water levels) is also the time of the busy Christmas break in Victoria. Water levels usually drop by November, yet, to some extent this can be addressed through knowing when water release from dams will occur. (Hydroelectricity companies get paid less for water on weekends and some enterprises take advantage of this and pay the price difference for water release on weekends). Also, there is usually water somewhere, so a change of rafting venues helps. Mountain based operators have also reported that staggering of annual holidays has a very positive effect on visitation rates to the region. Problems associated with lower water levels can also be addressed by using smaller boats, and variation of the trip length.

A number of mountain based operations tend to offer a range of products which are seasonally based. In these cases the operators provide transportation to ski slopes at appropriate times of the year and at other times

they provide four wheel drive tours into the hills and transportation to other places, such as major cities and airports.

There are also negative effects of seasonality on the availability of labour in the snow season compared to the summer months. There tends to be a changeover in the workforce across seasons, which necessitates training new staff. Wages for seasonal workers are low, but seasonal rent in the snow fields is usually high, so the seasonal worker can end up spending much of what they earn on rent – wages that are already low are made worse by the high seasonal living expenses. This can intensify problems in attracting and keeping good staff.

In the past it was standard practice for ski resorts to close during the summer, but now they remain open to cater for a different clientele from the winter season. With a rural mountain environment, diversification of products such as those associated with wellbeing and alpine nature trails are complimentary products that can be offered. By offering different product during the year, it is then viable to provide employment all year round to staff and to eliminate the problem of recruiting temporary staff on an annual basis. With year long employment, and provision of accommodation for temporary staff as part of the work package, the problem of recruitment in these locations is ameliorated.

Conclusion

It is evident from the information collected in this phase that seasonality in tourism is not always a negative phenomenon. Whether seasonality does have negative effects might also depend on the presence/absence of other moderator variables, such as the location of a business, or personal characteristics of the operator and the tourists. Such considerations are directly relevant to ‘good practice’. For instance, not all potential tourists are affected by seasonal restrictions on travel, and effective operators can develop products to attract such people. Another clear theme that emerged is that price cutting and discounting by itself is likely to have negative rather than positive influences and would not constitute ‘good practice’.

It is apparent that small changes can have major effects on overcoming negative seasonal influences, such as using smaller boats on a river with lowered water levels. However, some negative effects of seasonality appear not to be easy to overcome. These include the casual staff problems associated with low seasonal pay rates and high turnovers which create additional problems to do with things such as customer service and satisfaction.

It is also apparent that what we have referred to in the earlier chapters as facilitation by the state is important in addressing many negative supply and demand side aspects of seasonality. Examples include: staggering holidays; state-related water flow and availability; running festivals and special events; and environment protection initiatives. Therefore, the single enterprise needs to collaborate with external partners and other businesses, as well as local and state agencies to address the more serious impacts of seasonality.

Chapter 5

CONCLUSION AND RECOMMENDATIONS

The concept of seasonality is much studied and documented in the tourism literature. It is complex and has wide ranging impact on tourism enterprises and destinations. The fluctuations of visitor and tourist numbers to a region can be influenced by nature or by institutional interventions. Regardless of these, the impact of seasonality can be perceived as positive or negative depending on the perspective taken by the stakeholders.

Due to the undisputed impact caused by seasonality, there are strategies that can be adopted at enterprise and destination level to reduce the severity of the condition. Strategies used at the destination level are relevant to and can be adopted at the enterprise level. The strategies analysed in this report are grouped into the categories of differential pricing, diversified attractions, market diversity and facilitation by state. In addition, there are key issues relating to labour and employment that are common across a range of rural and remote settings.

For a destination in a remote location, seasonality can cause an under-utilisation of resources when visitor numbers are low and an over-increased demand for resources when too many visitors arrive in a short space of time. To address under-utilisation, strategies can be used to attract more visitors, such as events and festivals, promotion of destination through advertising and incentives to travel by creating and developing new attractions for that location. For example, wine tourism has been employed to attract visitors to a predominantly rural environment. Investment in infrastructure such as transportation to increase accessibility to the location does help make any location more attractive to visitors. The utilisation of events and festivals may be useful to temporarily increase visitation to the location but if this process is not managed appropriately, new problems can emerge such as the inadequacy of the infrastructure to accommodate the increase in visitors, damage to the environment and resentment of locals to the massive influx of visitors into their towns.

For the tourism operator, seasonality is perceived as part of their business environment. Where climatic conditions, for example river levels and drought, are related to their business operations, it is accepted that their core business will operate for part of the year. For other parts of the year, other forms of income are relied upon through the offer of another product or service, or the operator may close their business completely until the next season. The successful operators are highly innovative and resourceful in what they can offer. In addition, the marketing of their business can vary to target different markets to address the effects of seasonality.

Seasonality presents a number of issues that require special attention and strategies. The areas of greatest concern in relation to the impact of seasonality are:

- The ability of tourism enterprises to individually overcome the problems associated with large swings in seasonal demand;
- The ability of the local destination to provide infrastructure to handle the substantial swings in demand; and
- The desire for collaboration between tourism enterprises with destination and state agencies.

Considerations

There were a large number of strategies that were identified in this project that may be appropriate for many destinations and enterprises to address seasonal impacts. However, the decision to adopt any strategy is a decision that each owner or manager has to make. As with decision making, the more information that can be obtained, the more informed the decision will be. In the past, most decisions made about seasonality were based on economic reasons. Nowadays, there is an expectation that other factors need to be considered, including social and environmental factors. The triple bottom line concept includes the inclusion of stakeholders for their input to decisions that directly or indirectly affect them (Smith & Fischbacher 2005; Jones, Phelps & Bigley 2007). This is especially useful in an industry such as tourism which depends on links, networks and clusters. Tourism that encourages visitation to a destination which is populated by local residents needs stakeholder involvement and should include local input into major tourism projects that may cause significant change to their social and ecological environment.

With Australia facing a crisis with water shortages, it is appropriate to align strategies that can conserve rather than increase water usage. For example, certain aspects of the tourism industry rely on water use such as for spas and swimming pools that have to be topped up and changed regularly to cater for large numbers of tourists. Therefore, any future plans to increase tourist numbers to areas with natural water shortages should be considered carefully.

The use of events to bring visitors to a region or tourist attraction does not automatically work in all situations. These have to be planned and scheduled at appropriate times of the year or they will be badly

attended. This is especially so in rural environments. For example, events that are organised to increase visitor numbers in low periods may 'force out' the locals and in doing so have negative carry-on effects on non-tourism businesses in the area that rely largely on local trade.

The Future of Seasonality – New Solutions to Old Problems

Seasonality and its related issues are not new to the industry. However, at this time, the tourism environment is not identical to that of a decade ago. Communication technologies have improved and transportation infrastructure has been developed to reduce travel time. Destinations and enterprises are reliant on technology. Both advertising and promotion of a region to an international audience can be done cost effectively. Web pages, text messages and bulk e-mails can convey information to potential tourists of the future. Technology is used to manage the information in a business to provide immediate statistics and results to inform the decision making process. This includes providing information that can be used for monitoring and determining differential pricing strategies. Last minute accommodation offers can be advertised on the internet and the tourist can book and confirm their bookings solely through the internet. With the availability of improved performance monitoring tools there is greater possibility for enterprises to operate efficient businesses with their just-in-time pricing strategies and other just-in-time inventory coordination.

Technology has also influenced the study on seasonality. For example, the movement of tourist at a destination can now be monitored and analysed using cellular positioning data from their mobile phones (Ahas, Aasa, Mark, Pae & Kull 2007). This could not have been done a decade ago but is now possible because of the high number of mobile phone users.

In summary, while seasonality is not a new concept and has been extensively researched in the past, it is not a static concept. New factors such as technology, social change and market expectations impact on the management of seasonality. Hence, current and future plans and strategies should include improved consultation with a range of stakeholders at both the destination and enterprise levels as well as a thorough understanding of the changing needs of the tourist.

APPENDIX A: SOURCES OF INFORMATION FOR DOCUMENT ANALYSIS

State/Territory Organisation	Material	Source
Australian Capital Territory	Visitor Surveys and Profiles Market Segment Reports Event Reports	Events Development / Research Officer
Tourism NSW	Towards 2020 – Tourism NSW Master Plan Regional Plans: Hunter Tourism Development Plan 2005-08 Blue Mountains Tourism Development Plan 2004-07 Outback NSW Tourism Development Plan 2004-08 Central NSW Regional Tourism Plan 2004-07 North Coast Regional Tourism Plan 2004-07 Capital Country Regional Tourism Plan 2003-06 Riverina Regional Tourism Strategy 2003-06 South Coast Regional Tourism Plan 2003-06 Northern Rivers Regional Tourism Plan 2002-05 New England/North West Regional Tourism Plan 2001-05 Snowy Mountains Regional Tourism Plan 2001-04	Information Resource Centre Industry Development Group
Commonwealth Govt. NT Tourist Commission	A Shared Vision for Tourism in Kakadu National Park NT Tourism Strategic Plan NT Corporate Plan 2005-06 (Business Unit Plans are internal documents and not available to the public)	General Manager Strategic and Business Development
Tourism QLD	QLD Tourism Strategy June 2006 Draft Destination Management Plans and Strategies: Queensland, Brisbane, Bundaberg, Capricorn, Central Queensland, Fraser Coast, Gladstone, Gold Coast, Mackay, Outback, South East QLD Country, Sunshine Coast, Townsville, Tropical North QLD, Whitsundays Whole of State Plans and Strategies: Accessibility, Adventure, Arts & Culture, Aviation, Backpacking, B&B/Farmstay, Cruise Shipping, Drive, Ecotourism, Fishing, Food & Wine, Gay & Lesbian, Indigenous, Spa & Wellness	Industry Development
S.A Tourism Commission	S.A. Tourism Plan 2003-2008 Tourism Implementation Action Plan (Critical Success Factors: brand SA, air access, investment in new products, positive policy framework, industry capability) Regional Strategic Tourism Plans: Barossa and Clare Valley Regional Marketing Plans (internal documents)	Contacted Policy and Planning and directed to Marketing Manager
Tourism Tasmania	Tourism 21 Strategic Plan for the Tasmanian Tourism Industry 2004-014 The Tasmanian Experience Strategy Touring Route Strategies: Northern Tasmania Cradle Coast Southern Tasmania Wine and Food Tourism Strategy (Action agendas available for Tamar, East Coast and South East regions) Winter Challenge 21 (1998)	Project Consultant Destination Development

Tourism Tasmania	Tourism 21 Strategic Plan for the Tasmanian Tourism Industry 2004-014 The Tasmanian Experience Strategy Touring Route Strategies: Northern Tasmania Cradle Coast Southern Tasmania Wine and Food Tourism Strategy (Action agendas available for Tamar, East Coast and South East regions) Winter Challenge 21 (1998)	Project Consultant Destination Development
Tourism Tasmania	Tourism 21 Strategic Plan for the Tasmanian Tourism Industry 2004-014 The Tasmanian Experience Strategy Touring Route Strategies: Northern Tasmania Cradle Coast Southern Tasmania Wine and Food Tourism Strategy (Action agendas available for Tamar, East Coast and South East regions) Winter Challenge 21 (1998)	Project Consultant Destination Development

APPENDIX B: STRATEGY: DIVERSIFIED ATTRACTION

STRATEGY TYPE	SPECIFIC STRATEGY	ISSUE ADDRESSED	SOURCE	TRANSFERABLE TO
Introduction or development of festivals and events	Increase conference business in the winter (or in low season)	To improve the viability of airlines and accommodation establishments in winter	Tourism Tasmania – Winter Challenge 21	Event organisers and airline or accommodation businesses
	Offer additional activities to conference attendees to extend their length of stay	To increase spend by existing visitors	Tourism Tasmania – Winter Challenge 21	Event organisers Event facilities Locations with event potential
	Target event organisers in other states to encourage the holding of events in Tasmania during winter	To sustain and expand the winter business event market	Tourism Tasmania – Winter Challenge 21	Interstate event organisers
Offering themed packages	Promote the destination during winter by offering packages linking with special occasions or events (birthday's, anniversaries or cultural calendar events)	To motivate people to visit in the winter season to increase visitation and spending	Tourism Tasmania – Winter Challenge 21	Accommodation, restaurants and attractions
Offering off-season holiday package	Develop and sell tailored holiday packages that encourage travel to the destination during the shoulder season	To increase the number of travellers during the shoulder seasons	NT Corporate Plan 2005-06	For all tourism locations
	Provide shorter holiday packages for the short break market	To increase visitation due to increased trends for Australians to take more 'short break' holidays	Tourism Tasmania – Winter Challenge 21	For all tourism locations
Work with the private sector to diversify into niche accommodation products	Support and promote changing of Bed and Breakfast facilities to backpacker accommodation	Attracting a different market	Tourism WA – Australia's Coral Destination Development Strategy	Bed and breakfast accommodation Backpacker market
Development of a new attractions and activities (products) across the year	Develop hot springs/spa style tourism	Attracting greater visitation across the year	Tourism WA – Australia's Coral Destination Development Strategy	Spa and resort products
	Undertake a feasibility study to investigate indigenous tourism opportunities	Attracting a niche market segment	Tourism WA – Australia's Coral Destination Development Strategy	Indigenous tourism potential
	Add more interpretive sites	Attracting a niche market segment	Tourism WA – Australia's Coral Destination Development Strategy	Indigenous, cultural, historical or nature tourism
	Investigate the development of themed routes	Attracting new markets	Tourism WA – Australia's Coral Destination Development Strategy	Locations with the potential for trail development

	Develop food and wine and cultural heritage products/attractions	These activities are attractive year round and can be made a feature in the low periods to attract greater visitation and spend	Tourism Tasmania – Winter Challenge 21	Restaurants and cafés Cultural and heritage sites
	Generate new experiences that attract different people during the six different annual seasons at Kakadu	To extend seasonal visits to Kakadu	Northern Territory Tourism Strategic Plan – 2003-2007	NT specific
Design strategies to focus on quality experiences	Focus on destination development for visitor <i>experiences</i> associated with World Heritage values rather than <i>attractions</i>	Higher yield and improved economic and social returns rather than visitor numbers	A Shared Vision for Tourism in Kakadu National Park 2006	Locations or products with or seeking to develop quality experiences
Develop products that meet the needs and expectations of priority markets	Highlight primary special interest product of state-wide significance (e.g. food & wine, events etc)	Dispersal of visitors geographically and seasonally	Tourism Victoria 2002-06	All locations
Develop and promote facilities for the backpacker market	Align backpacker accommodation with seasonal work opportunities in regional areas	Drawing backpackers to areas of low visitation and at times of low visitation	South Australian Tourism Plan 2003-2008	Backpacker accommodation
Develop and promote the product destination to differentiate it from other destinations	Promote the state to international visitors so that it is seen as a ‘uniquely’ different year round destination compared to other states/countries	To encourage year round visitation	Tourism Tasmania – Winter Challenge 21	All locations
	Focus on destination development for Kakadu visitor experiences rather than attractions – with refreshment of existing and development of new experiences	To develop seasonal opportunities for increase of visitation	Northern Territory Tourism Strategic Plan – 2003-2007	All locations

APPENDIX C: STRATEGY: MARKET DIVERSIFICATION

STRATEGY TYPE	SPECIFIC STRATEGY	ISSUE ADDRESSED	SOURCE	TRANSFERABLE TO
Develop regional events	Investigate opportunities for events in the Kimberley	Attracting visitors at specific times of the year (e.g. low season periods)	Tourism Western Australia – Australia’s North West Coast Destination Development Strategy	All locations with the potential for hosting events
	Develop a multi-cultural event	Attracting new visitors	Tourism Western Australia – Australia’s North West Coast Destination Development Strategy	All locations with the potential for hosting events
Marketing campaigns to attract different markets in different seasons (a multi-segment or targeted approach)	Undertake a product inventory of the availability of non-season products to determine the gaps	To assess whether there is potential to increase visitation or yield in down or slow periods	Alpine Resorts Tourism Business Plan 2003-06; Tourism Victoria 2002-06	All locations
	Include all seasons experience in complementary marketing campaigns	Raising awareness of all season products (re-branding activity)	Alpine Resorts Tourism Business Plan 2003-06; Tourism Victoria 2002-06	All locations with the potential for ‘all seasons’ offerings
	Develop thematic tactical campaigns each year	Two key themes for the spring-summer period and the autumn winter period focus on the all year round experiences to ensure visitation across all four seasons	Seeds for Success. Australian Capital Tourism: Domestic marketing and sales plan 2006-08	All locations with the potential for ‘all seasons’ offerings
	Position destination for holidaymakers not just for particular enthusiasts (such as sports enthusiasts)	Increase the opportunities for and awareness of holidays in the region throughout the year	Alpine Resorts Tourism Business Plan 2003-06; Tourism Victoria 2002-06	All locations with a past focus on one particular market segment
	Promote seasonality and increase the availability of fresh product (e.g. food and wine)	Increase current market share	Tasmanian Wine and Food Tourism Strategy	Locations with a strong seasonal product which is sustainable
	Target markets that are less seasonal in their preferences (e.g. those with a high level of wine knowledge and Baby Boomers)	Better understanding of niche market for lessening the impact of seasonal variations in cellar door visitations	New Zealand winery operators	Wineries. Possible application to others with a sustainable product
	Market Tasmania in winter to niche market segments (e.g. Socially Aware, Visible Achievers) as they are likely to try new experiences	More cost effective in terms of marketing costs as it is targeted and likely to be of more value	Tourism Tasmania – Winter Challenge 21	All locations with current or potential niche products
	Market Tasmania in winter to repeat visitors	Increase chances of greater visitation as this segment is more responsive than non visitors	Tourism Tasmania – Winter Challenge 21	All locations

	Target interstate, international visitors as well as locals who are known to have good visitation at other times of the year (based on holiday desires and expectations and ease of access)	Increase chances of greater visitation as these visitor segments have a history of visitation	Tourism Tasmania – Winter Challenge 21	All locations
Raise awareness of the destination beyond peak season	Implement campaigns to raise awareness of target markets and trade partners about the ability and appeal of travelling to the Territory beyond peak season	Increasing visitation in low periods and increasing market penetration	NT Corporate Plan 2005-06	All locations
Ensure an integrated marketing approach for the non-winter period	Consistent consultation and communication between tourism committees and the resorts in the Alpine area	Raise awareness of holidays in Alpine regions throughout the year to increase visitation	Alpine Resorts Tourism Business Plan 2003-06	Alpine areas. All regional locations
	Promote a consistent brand for the Victorian winter experience	Raise awareness of experiences in Alpine regions throughout the year to increase visitation	Tourism Vic Strategic Plan 2002-06	Alpine areas. All regional locations
	Include spring, summer and autumn experiences in complimentary marketing campaigns	Raise awareness of experiences in Alpine regions throughout the year to increase visitation	Tourism Vic Strategic Plan 2002-06	Alpine areas. All regional locations with obvious climatic seasonal differences
Increase year round-visitation	Leverage touring opportunities	To increase year round visitation to the alpine regions	Tourism Vic Strategic Plan 2002-06	Alpine areas. All regional locations with touring potential
Promote the destination as a 'must see' backpacker destination	Value-adding to the backpacking experience by linking with adventure tourism activities	Increase visits and length of stay of particular markets	SA Tourism Plan 2003-08	Backpacker focused entities/locations
Identify target markets where government involvement/resources can make the greatest difference	Foster non-seasonal markets e.g. retirees form inbound markets, backpackers, business travellers and the MICE market; and encourage and work within existing flexible working hours provisions to reduce traditional emphasis on weekend short breaks	To alter tourism patterns to achieve a reduced reliance on peak periods/seasons	Towards 2020 – NSW Tourism Masterplan	All locations

APPENDIX D: STRATEGY: FACILITATION BY THE STATE

STRATEGY TYPE	SPECIFIC STRATEGY	ISSUE ADDRESSED	SOURCE	TRANSFERABLE TO
Provide a winter subsidy scheme to professional event organisers as an incentive to increase conference visitors	Encourage professional event organisers to hold their event in the state during winter months	To increase business event attendance in the winter	Tourism Tasmania – Winter Challenge 21	For government bodies with a focus on events
Improved and expanded regional infrastructure	Provide a range of visitor facilities, services and information that presents the natural and cultural features through six seasons	Greater access to rural or remote areas during both high and low seasons	A Shared Vision for Tourism in Kakadu National Park 2006	Local and state government agencies. Regional tourism bodies
	Conduct a pilot review of planning controls in selected regions in order to identify strategic opportunities for (re)development	To improve the destination to increase tourism	Tourism NSW – Towards 2020 Master Plan	Local and state government agencies. Regional tourism bodies
	Investigate better access to Kakadu during the wet season	To provide year round access to the area	Northern Territory Tourism Strategic Plan – 2003-2007	Local and state government agencies. Regional tourism bodies
Improve visibility of state and regional icons	Invest in sufficient infrastructure, attractions, accommodations and other tourism facilities	Dispersal of visitors so that all parts of a region can benefit from tourism activity	Tourism WA Destination Development Strategy 2004-14	Local and state government agencies. Regional tourism bodies. Possible partnerships with private agencies
Development of the local infrastructure (to improve access to restricted natural attractions)	Provision of sealed roads	Increasing access across the year	Tourism WA – Australia's Coral Coast Destination Development Strategy	Local and state government agencies. Regional tourism bodies
	Work with air service providers to obtain regular flights	Providing regular access across the year	Tourism WA – Australia's Coral Coast Destination Development Strategy	Local and state government agencies. Regional tourism bodies. Possible partnerships with airlines
Facility or structural development (e.g. public transport, public amenities)	Develop a state aviation policy integrating international, domestic and regional air services to maximise the state's access to airlines, including leisure and business tourism	Increasing visitation in low periods and across the year	Tourism NSW – Towards 2020 Master Plan	State and territory governments

Invest in major and business events to strengthen the destination's brand	Establish selected regional destinations as conference hubs	Improve yield and flattening of seasonality patterns	Tourism NSW – Towards 2020 Master Plan	Local and state government agencies Regional tourism bodies Event organisations
	Promote greater use of existing MICE facilities		Tourism NSW – Towards 2020 Master Plan	Local and state government agencies. Regional tourism bodies. Event organisations
	Foster training in MICE marketing and conference bidding		Tourism NSW – Towards 2020 Master Plan	Local and state government agencies Event organisations
Develop a balanced program of events	Review the calendar of events and identify any market opportunity for new events		SA Tourism Plan 2003-08	Local and state government agencies
	Leverage major events by encouraging longer stays through pre- and post- touring		SA Tourism Plan 2003	Event organisations.
	Bid for and managing events that provide a spread of activities throughout the year		SA Tourism Plan 2003	Local and state government agencies
Develop communication between industry organisations	Enhance communications to industry for tactical campaigns to address seasonality	To market the state as an interconnected experience throughout the year	Tasmanian Tourism Industry and Tasmanian State Govt	Local and state government agencies and tourism organisations
	Provide industry with information on emerging trends in holiday purchase behaviour	So managers can plan for the future and make changes as needed	Tourism 21 – Strategic plan for the Tasmanian Tourism Industry	Tourism research agencies and tourism organisations

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The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program. STCRC is the world's leading scientific institution delivering research to support the sustainability of travel and tourism – one of the world's largest and fastest growing industries.

Introduction

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

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

Role and responsibilities

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

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

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

STCRC's objectives are to enhance:

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