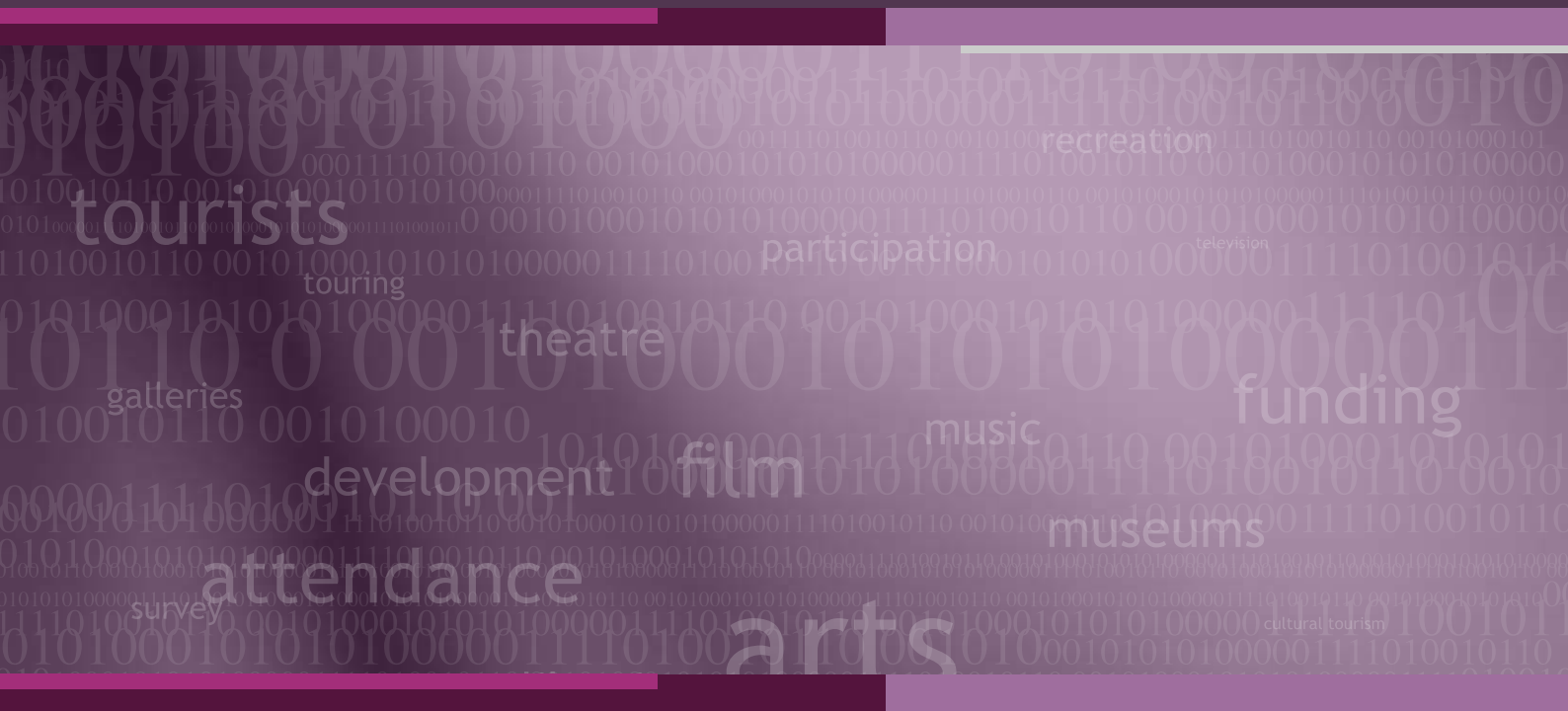


Crafting Regional Growth

A GUIDE TO EVALUATING CULTURAL TOURISM IN YOUR REGION



Acknowledgements

Crafting Regional Growth – A guide to evaluating cultural tourism in your region was commissioned by the Cultural Ministers Council Statistics Working Group.

This project has been managed through the Australian Regional Tourism Research Centre (formerly the Centre for Regional Tourism Research) at Southern Cross University. The centre is indebted to the Sustainable Tourism Cooperative Research Centre (STCRC) for providing access to the network of researchers and practitioners who have contributed to the guide's development. In particular, we have called heavily upon Leith Bailey and Ken Robinson at Edith Cowan University Bunbury Campus, and Jim Macbeth and Dianne Lee at Murdoch University in Perth.

The foundations for the visitor expenditure methodology have been developed by Jack Carlsen and David Wood at Curtin University of Technology in Perth. Ros Derrett at Southern Cross University and Brent Ritchie at the University of Canberra provided insights from their experiences. Jo Mackellar from Southern Cross University was instrumental in establishing the project. We are also indebted to Flinders University for allowing us to work with Daniella Trimboli, a final-year Cultural Tourism student.

The case study snippets were made available to us by a range of practitioners in various locations across Australia. We thank them all. Most significantly, we acknowledge the contribution of Pina Versace, Sonya Dye, Andrew Horan, Melissa Hyder, Julie Atkinson, Phyllis Barnes, Barry Green, Felicity Anderson and Diana de Busey in Bunbury.

Crafting Regional Growth – the guide has been updated and adapted from the original *Crafting Regional Growth Resource Kit* by Margie Benson with the assistance of Jeremy Buultjens at the Australian Regional Tourism Research Centre.

The guide has also been modified in consultation with state tourism agencies.

June 2008

1 INTRODUCTION.....	1
1.1 About the Cultural Ministers Council Statistics Working Group.....	1
1.2 About the Australian Regional Tourism Research Centre	1
1.3 Organisers and cooperating institutions.....	1
1.4 Overview of the guide	1
1.5 Users and workshop participants	2
1.6 Structure of the workshop program.....	2

WORKSHOP ONE: CULTURAL ASSETS

2 WHAT IS CULTURAL TOURISM?.....	5
2.1 Defining cultural tourism.....	5
2.2 Defining latent or manifest products.....	6
2.3 What benefits can it provide?.....	6
2.4 What is its significance nationally?.....	6
3 ASSET MAPPING.....	9
3.1 Locating themes.....	9
3.2 Case Study: City of Bunbury, Western Australia.....	10
3.3 Asset mapping	11
3.4 Theme building.....	12
3.5 Cultural asset recording instrument	13
3.6 Analysis.....	14

WORKSHOP TWO: ECONOMIC VALUE

4 VISITOR SURVEYS AND ANALYSIS.....	17
4.1 Visitor survey.....	18
4.2 Interviewing	18
4.3 Who to approach.....	19
4.4 How many respondents?	19
4.5 Visitor survey instrument.....	20
5 ANALYSIS OF VISITOR EXPENDITURE	23
5.1 Direct spend research method	23
5.2 Analysing the data.....	23
5.3 Substitution factor	24
5.4 Attribution factor	24
5.5 Visitor expenditure	24
5.6 Cultural tourism expenditure	26
6 BUSINESS INDICATORS.....	27
6.1 Conducting business surveys	27
6.2 Who to interview.....	28
6.3 Collecting the data	28
6.4 Business survey instrument	28
6.5 Analysis of business interviews.....	32

WORKSHOP THREE: LOCAL GOVERNMENT IMPLICATIONS

7 LOCAL GOVERNMENT AND TOURISM.....	39
7.1 Tourism Impact Model.....	39
7.2 Data detail	41
7.3 Case study: local government investment in cultural tourism	41

WORKSHOP FOUR: SPEAKING OUT

8	SELLING THE MESSAGE.....	47
8.1	Stakeholders	47
8.2	Developing your message.....	48
8.3	Message delivery	49
8.4	Public relations plan	50
8.5	Raising your profile	51
8.6	Local MPs/elected officials.....	51
8.7	Meeting with MPs/elected officials	51
9	CULTURAL TOURISM INNOVATION.....	53
9.1	Economic competence	53
9.2	Resource clustering	54
9.3	Networks	55
9.4	Entrepreneurship.....	55
9.5	Critical mass.....	56
9.6	Institutional Infrastructure.....	57
9.7	Production and distribution of knowledge	58
9.8	Social, cultural and political capital	59
9.9	That's a wrap.....	60
10	ADDITIONAL RESOURCES.....	61

1 Introduction

1.1 About the Cultural Ministers Council Statistics Working Group

In November 1985, the Cultural Ministers Council, which comprises Australian, state and territory and New Zealand Government ministers responsible for the arts and cultural heritage, established a statistics advisory body now known as the Statistics Working Group.

The group liaises with the Australian Bureau of Statistics on cultural statistics, monitors the need for the development, collection and dissemination of cultural and leisure statistics, commissions studies, and provides advice to the Cultural Ministers Council on statistical matters.

1.2 About the Australian Regional Tourism Research Centre

The Australian Regional Tourism Research Centre (ARTRC) undertakes local and national projects across Australia linking studies with many universities. The centre is a partnership between Southern Cross University and the Sustainable Tourism Cooperative Research Centre. Its primary focus is to identify and pursue a research agenda which contributes to the sustainable development of regional areas through the use of tourism, recreation, and related industries.

1.3 Organisers and cooperating institutions

The Crafting Regional Growth project was commissioned by the Cultural Ministers Council Statistics Working Group. The project is managed through the Australian Regional Tourism Research Centre at Southern Cross University with a high level of involvement and contributions from university partners, including Murdoch University, Victoria University, Monash University, the University of Canberra, Charles Darwin University, the University of Queensland, James Cook University and the University of South Australia.

1.4 Overview of the guide

This guide is presented in a workshop format and steps users and participants through techniques for gathering information to assess the economic value, tourism impact and benefit of cultural tourism in a destination. It may also be used by individual researchers working through the guide independently.

On completing the two-day workshop, participants will have the skills to be able to:

- **Conduct a cultural asset audit** which will identify not only the potential product in your destination, but who manages the product and how it is currently being used in tourism marketing;
- **Perform an analysis identifying clusters and themes** of cultural product that can be used in targeting specific tourist markets;
- **Run a visitor survey** to estimate the proportion of visitor expenditure which can be attributed to cultural assets in your destination;
- **Run a business survey** to estimate the value of cultural assets in supporting employment and business income, and
- **Use the Tourism Impact Model¹ (TIM)** to assess the contribution of cultural tourism to the outcomes of the model.

¹ Developed by the former Commonwealth Department of Industry, Tourism and Resources (now Resources, Energy and Tourism) to help local government account for their tourism related expenditure.

1.5 Users and workshop participants

The guide has been designed for use by cultural and tourism officers, community arts groups and arts funding bodies. While there is a focus on local government, the tools can be used at any geographic level by any organisation with the resources to build and manage the knowledge base.

1.6 Structure of the workshop program

The workshop program is divided into seven sessions delivered over two days.

WORKSHOP ONE: Cultural assets

Session 1: What is cultural tourism?

Session 2: Asset mapping

WORKSHOP TWO: Economic value

Session 3: Visitor spending

Session 4: Business analysis

WORKSHOP THREE: Local government implications

Session 5: Local government and tourism

WORKSHOP FOUR: Speaking out

Session 6: Selling the message

Session 7: Cultural tourism innovation

WORKSHOP ONE

Cultural assets

Session 1: What is cultural tourism?

Session 2: Asset mapping

Session 1

2 What is cultural tourism?

Australia does not currently endorse one specific definition of cultural tourism, mainly because it means different things to different people. Various definitions are currently in circulation; however all of them touch on similar ideas of tourism which is education-based, interactive and sustainable for communities.

In this session we will:

1. Discuss the definition of cultural tourism
2. Explore tools to record 'latent' and 'manifest' tourism products
3. Identify the economic and social benefits tourism provides
4. Identify the national significance of cultural tourism
5. Locate key sources of data relevant to cultural tourism.

2.1 Defining cultural tourism

Perhaps the most suitable definition of cultural tourism for the purpose of this workshop is based on the Commonwealth of Australia's 'Creative Nation' (1994) definition, which talks about cultural tourism as being:

... the business of providing and interpreting a place's culture to visitors – including its lifestyle, heritage, arts and people – in a way that helps visitors understand what makes that place distinctive.

Essentially, cultural tourism encourages visitors to engage with those elements of a destination which make up its culture or essential character, including its:

- people and lifestyle
- arts and heritage
- food, wine and local produce
- social, economic and political structures
- history and archaeology
- cultural diversity
- cultural landscapes.²

Some of these elements may have already been commodified into a tourism product or attraction. Examples of such products include festivals, which allow visitors to gain an understanding of the local people and their lifestyle, or museums, where artifacts are used to tell visitors something about a place's history or cultural influences.

Pointer:

- Contact Tourism Australia or the Australian Government Department of Resources, Energy and Tourism, or your regional or state tourism body, to see what strategies may be in place that includes a definition of various aspects of culture and tourism.

² Leader Elliott (1996:3)

2.2 Defining latent or manifest products

Such assets can be described as *manifest* cultural tourism assets, as they have already been recognised and are being used in tourism in some form. However, there are other elements in communities that may not yet have been identified as cultural tourism assets, and as such are not being used as tourism products. These can be known as *latent* cultural tourism assets. An example might be heritage buildings in a town centre which have no form of interpretation (e.g. no signage, not included in a tourist walk etc.)

One of the great things about cultural tourism is that it is not bound to one particular form or type. Rather, it embraces a range of different cultural assets and encourages communities to make use of their own unique qualities, customs and stories. Often communities contain many latent cultural assets that could flourish if they were linked together by a theme common to the community.

2.3 What benefits can it provide?

Benefits of cultural tourism occur at both local and national levels and come in both tangible and intangible forms.

The economic benefits are perhaps the most tangible, with increased tourism activity stimulating the local economy through income from visitor expenditure. This income can be converted to increased employment and contribute to the overall strength of the local economy.

The other benefits of cultural tourism, which are equally important, but sometimes harder to pinpoint, are the intangible effects it has on a community. In many ways, cultural tourism encourages communities to celebrate their own individual qualities, and therefore has the potential to lift community spirit in some way. By turning a community's cultural assets into a product, cultural tourism can allow for the restoration or rejuvenation of the local heritage, and in turn create a strengthened community identity and a heightened sense of community pride.

2.4 What is its significance nationally?

A study commissioned by the Cultural Ministers Council Statistics Working Group, was undertaken by the Bureau of Tourism Research to determine the economic impact of cultural tourism in Australia.

This study's conclusion was:

Cultural visitors represent an important part of the tourism sector. On average during the four year period 1997–98 to 2000–01 a total of 21.8 million international, domestic overnight and domestic day visitors per annum engaged in a cultural activity while travelling in Australia.

This is on average 47 per cent of all international visitors, 13 per cent of all domestic overnight visitors and 6.7 per cent of all domestic day visitors.

These cultural visitors spent on average a total of \$17.8 billion per annum, or 28 per cent of total tourism expenditure in Australia over the period.

International cultural visitors accounted for \$9.7 billion or 54 per cent of this total cultural visitor experience.

Cultural visitors contributed proportionally more to the Australian economy in terms of GVA, GDP, employment, wages and consumption than their non cultural visitor counterparts.

Both international and domestic cultural visitors on average travelled more nights than non-cultural visitors and spent more while traveling in Australia than non cultural visitors.

In 2000–01, cultural visitors in Australia contributed 26.4 per cent to tourism's total GDP or 1.3 per cent of Australia's total GDP.

Research has shown that in 2000–01 cultural visitors contributed:

\$8.4 billion to GDP

\$7.0 billion to GVA

143 000 to tourism persons employed

\$4.4 billion to wages and supplements

\$15.7 billion to consumption, and

\$8.7 billion to export earnings

For further information see:

Bureau of Tourism Research (2004), *Economic Impact of Cultural Tourists in Australia*, Cultural Ministers Council Statistics Working Group, January 2004.

Statistics tell us that cultural assets by themselves are insufficient to support a cultural tourism sector. Cultural assets need to be identified and traded on, either directly (through entrance fees etc) or indirectly, through their contribution to visitor experiences that ultimately lead to income for businesses in accommodation, tours, transport, food and beverage and attractions sectors.

Cultural tourism therefore needs to be organised to most effectively deliver its benefits to tourism destinations.

There is a range of resources, statistics and commentary on cultural tourism in Australia and internationally. The Bureau of Tourism Research report contains some of these. The Decipher online tourism research database (www.decipher.biz) lists about 50 key resources.

Pointer:

- Contact your state tourism organisation to see what resources and information are available.

Session 2

3 Asset mapping

The first step in assessing the value of cultural tourism is to achieve some sort of consensus about what cultural assets the destination has, how they might be linked, and how they are currently used to attract and service visitors. Most destinations have maps showing visitors where various tourism assets are located.

In this session we will:

1. Identify and catalogue cultural tourism assets in the region
2. Create an instrument to record these assets
3. Identify themes and clusters of cultural tourism assets
4. Define industry stakeholders.

3.1 Locating themes

Building a map of cultural tourism assets will help you identify themes and get a feel for the extent to which your cultural assets are being used as tourism assets.

The map will identify *manifest* cultural assets – those that are currently being used as tourism product. It may also identify *latent* assets – products and services which have strong cultural representation, but have not been used in a tourism sense.

The map itself is a representation of some basic information about location and type of asset. Other information collected about each asset will also describe:

- who owns or manages it;
- whether it includes a commercial aspect (ticketing, purchasing etc) or is provided free of charge, and
- to what extent the asset could be considered an active tourism asset.

The real value is to use the map as a basis for identifying cultural themes and assessing the strength of attachment that various stakeholders have to those themes.

The mapping process might take a week, including discussing your results with key stakeholders. The map itself should be a dynamic record of cultural assets that can be added to over time.

There are a number of ways you can go about the mapping process. Electronic maps can be built using geographic information systems (GIS) software such as Mapinfo or Arcview. Your local government may have such software. Or you can use a graphics program such as Microsoft Visio or Photoshop to draw symbols on an electronic street map. There's always ink and hard copy maps!

3.2 Case study: City of Bunbury, Western Australia

The City of Bunbury is located approximately 176 kms south of Perth and is the regional capital for the south-west of Western Australia. The population of the city currently stands at 29,000 with more than 29 different nationalities living within the city's boundaries. A further 45,000 people live within the Greater Bunbury catchment area that surrounds the city. It receives approximately 187,000 intrastate, interstate and international visitors per year, with the intrastate market the largest.

The Bunbury City Council, through its 'Living the Vision' branding and related strategies, has been positioning the city as a 'great place to live, work, play and visit'. This provided us with a holistic concept to use when interpreting and analysing the city's approach to cultural tourism. When conducting the cultural asset audit for Bunbury, we identified and mapped the following key themes:

Water/Maritime heritage

Being geographically situated within the confines of the Leschenault Estuary, Koombana Bay and the Indian Ocean, Bunbury has historically maintained a strong 'sense of place' attachment to its waterways. It is through this geographic and lifestyle attachment to the theme of water that a number of commercial operations, events and festivals and attractions have been developed.

These water theme manifestations provide visitors with an avenue to engage with that lifestyle. *'One of our priorities in developing tourism product is maintaining the sense of place that represents our culture,'* says Pina Versace, Marketing Officer City of Bunbury. The city celebrates its water lifestyle with the annual 3 Waters Festival, that centralises all of the festival activities within its Bicentennial Square precinct, which is located adjacent to the Leschenault Inlet.

The Marlston Hill Waterfront Precinct is a major redevelopment that has incorporated elements of a maritime heritage theme. A maritime heritage boardwalk provides visitors and residents alike with the chance to wander the waterways. A series of specially designed plaques have been installed that interpret the area's maritime history along with representations of the value of the city's historical links to its port through the installing of bollards throughout the precinct.

Visual/Public art

A key action identified in the City of Bunbury's Sustainability Strategy is to maintain the varied sculptures and public art that dot the city's main transport routes and are integral to the built heritage. *'We will commission a further 2 artworks per year to further add to the existing landscape' (Sustainability Strategy for Bunbury, Planning for our Future).* Cultural Development Officer, Sonya Dye, believes that *'assets such as our public art are vital to our community and add to the aesthetic feel experienced by visitors to the city'*. All the promotional material we uncovered certainly provides information of the city's 'love affair' with public art.

Built heritage

The built culture of Bunbury includes places like King Cottage Museum that house the city's historical collection, and which do engage with the tourism industry. However the city's public art and heritage sites, such as The Old Post Office and Courthouse, St Marks Anglican Church, Rose Hotel, Timber Jetty, Twin Cathedrals and Pioneer Park, are less overtly tied to tourism activity and may represent latent attractions.

Indigenous heritage

We identified this theme as one that is latent at present. However, an analysis of Bunbury City Council strategic and planning documents specifically identifies the development of a Noongar Cultural Centre (Noongar, the tribal name). This is a good example of emerging themes within any destination. So, although this is a largely latent theme, the local government authority and its stakeholders have recognised the growth potential that does exist in ensuring the development of Indigenous heritage.






Icon	Description
	Aboriginal heritage
	Crafts and gifts
	Maritime heritage
	Public art
	Visual and performing arts

Figure 1: Asset mapping: cultural tourism assets in Bunbury.

3.3 Asset mapping

To undertake the mapping process, you will need:

- A template for recording information about assets
- An electronic or hard copy map of the destination
- Tourism brochures, touring guides, web sites etc for your destination
- Tourism plans and cultural plans for your destination, region or state
- Key stakeholders, particularly those who own or manage cultural tourism assets.

There are a few points to keep in mind when doing the mapping:

- You might choose to start by identifying the cultural assets on your existing tourism map – but don't stop here. The cultural assets on the tourism map are *manifest* cultural tourism assets. There may also be *latent* assets – those that have not yet been used in tourism marketing. You can get a sense of the value of cultural tourism to the tourism sector by seeing how many of these latent assets there are.
- Finding manifest assets can be quite straightforward. As well as tourist maps, you can identify cultural assets from brochures at the Visitor Information Centre or product featured on your destination web site.
- Finding the latent assets may not be so easy. You might have to do a walk or drive around the destination to pick up businesses and attractions that are not currently on the map.
- It is important that you collect some information about who manages each asset so that you can include these managers as stakeholders throughout the process. You also need to note which product is free and which is sold on a commercial basis.

The real value of doing the mapping is to identify *themes* and *clusters* of cultural tourism assets. Use different colours and icons to represent different themes on your map.

After completing the asset mapping exercise you will have developed an initial idea of the sorts of themes that might exist in your destination. The next step is about doing a bit more work on what cultural themes might exist and how closely they have been linked to tourism. These cultural themes (rather than individual assets) will be used to analyse patterns of visitor spending, employment and business income.

3.4 Theme building

There are two components to theme building. The first is to review the tourism plans and cultural plans that may have been developed for the destination. The local government will probably have some, and so might the local and regional tourism organisations.

In analysing these plans, you may find that some cultural themes such as visual arts and maritime heritage are quite prominent. Some of the other themes identified in the mapping may not be featured at all in the various plans. You may also find that the Aboriginal heritage theme, while featured in the tourism plans, is not picked up in the mapping.

The second theme building component is to talk to tourism and cultural stakeholders about the themes they think are important. This is a relatively informal process that you might do as individual interviews or as a group discussion. The following people might be important:

- Local government tourism and/ or economic development manager
- Local government cultural officer
- Chair of the local tourism association
- Manager of the Visitor Information Centre
- Manager and/or Chair of the Regional Tourism Organisation
- Chair of the Chamber of Commerce
- Owners of managers of the more prominent cultural tourism product (regional art galleries etc.)
- Managers of any significant cultural events held in the destination
- Chairs of Rotary, Lions Club and other community groups
- State Tourism Organisation
- Regional Development Commission.

Two questions can provide a framework for discussion. They will also help you find out how attached the various stakeholders are to the idea of developing a cultural tourism sector.

1. How important do you think cultural assets are to attracting visitors to this destination?
2. What cultural themes do you think this destination is able to promote to visitors?

A third question could be undertaken by desktop research.

3. What is currently being promoted for cultural tourism in the town/region?

You might offer to get back to these stakeholders with your final list of four or five main cultural themes for your destination. You might find that there is a strong consensus of opinion and strong agreement between the themes the stakeholders

identify and the themes you found in your mapping and analysis of tourism and cultural development plans.

On the other hand, there may be a variety of opinions, and it might be difficult to draw down three or four clear themes. If you struggle to identify themes, it will certainly make the rest of the value assessment process difficult. It might also make it difficult for your tourists and tourism businesses to value your cultural identity!

3.5 Cultural asset recording instrument

This is an example of a spreadsheet template that can be set up in a spreadsheet program, such as Microsoft Excel, for recording information about cultural tourism assets.

ID	Name	Sector	Located by	Type	Theme	Accessibility	Managed by	Status	Address

Field	Description
ID	Give each asset a unique ID (usually a number or short number/ letter sequence). The ID should be less than eight characters long particularly if you are interested in moving the map to a GIS at some point.
Name	Record the name of the asset, or use a descriptive title for un-named assets.
Sector	Classify the asset as being – <ul style="list-style-type: none"> • An attraction • A tour • A retail outlet • Streetscape • An event • A memorial • Memorial (natural heritage)
Located by	Identify how you found the asset, for example – <ul style="list-style-type: none"> • Tourism brochure • Community directory • Physical audit • Stakeholder interview • Reference from a key informant <p>This will help you assess the strength of attachment between the asset and tourism.</p>
Type	Classify the asset as manifest (if it is clearly being picked up and used by the tourism sector) or latent (if it is not being used in tourism).
Theme	Record themes after the assessment process is completed
Accessibility	Record any restrictions on visitation, including regular opening hours if applicable. What special access provisions are there, such as wheelchair access, hearing loops, etc?
Managed by	Record a contact name or organisation name.
Status	Mark the status as 'commercial' or 'non-commercial'.
Address	Record a short address that will help you fix the asset's position on the map.

3.6 Analysis

In your analysis, you should be able to answer the following questions:

1. What is the balance between privately and publicly owned assets?
2. What is the balance between commercial and free access assets?
3. To what extent are there existing links between cultural assets and the tourism sector? What drives these links?
4. What themes have strong attachment from all stakeholder groups?
5. What might be the gaps in stakeholder knowledge about cultural assets and their tourism potential?
6. What is the nature and role of the cultural tourism asset?
7. Does the cultural tourism asset compliment or support other cultural tourism or tourism assets?

The case study destinations have found a visual representation of the cultural assets and their links to tourism to be a powerful tool in encouraging stakeholders in tourism and regional development to consider the role of culture in fostering regional growth.

They have also found that the mapping process alerts them to the diversity of product, the links between product, and some of the ways the community has interpreted their identity and attempted to communicate this identity to residents and visitors.

The first part of the message is that the destination currently has some strong cultural themes, and it may also have some themes which are deemed important, but which have not been picked up on in a tourism sense. This can start a discussion with destination managers, tourism planners, business owners and community groups about how themes might be developed over time.

WORKSHOP TWO

Economic value

Session 3: Visitor surveys and analysis

Session 4: Business indicators

Session 3

4 Visitor surveys and analysis

One direct and quantifiable measure of the value of cultural tourism is the amounts of money visitors spend on cultural tourism assets and to what extent their total spending in the destination can be attributed to those cultural assets.

In this session we will:

1. Identify techniques for collecting visitor information
2. Explore methods of calculating visitor information.

Standard approaches to estimating visitor expenditure label these as:

1. *direct spending benefits* – the value of tickets, tours, souvenir purchases etc that accrues directly to cultural tourism businesses (see 5.1)
2. *attribution benefits* – the extent to which expenditure on other products and services was determined by the visitor's desire to consume the cultural products (see 5.4)
3. *substitution benefits* – a weighting given to indicate whether the lack of the cultural assets (in the case of a destination, its cultural themes) would have resulted in the visitor going elsewhere (see 5.3).

There are two techniques for collecting information about visitor expenditure. One is to ask visitors, and the other is to ask businesses where businesses might be spending their money.

Both techniques have advantages and disadvantages. However, the Sustainable Tourism Cooperative Research Centre through research by Carlsen and Wood (2004) developed a visitor survey and analysis technique which is ideally suited to our purposes. It was used by Carlsen and Wood to assess the value of natural assets (national parks and other protected areas) to nearby destinations. Carlsen and Wood surveyed 450 visitors, but other Sustainable Tourism Cooperative Research Centre research suggests as few as 150 respondents may provide good results.

The other issue, apart from sample size, is whether to try and calculate a dollar value for all visitor expenditure related to cultural tourism, or to calculate what proportion of total visitor expenditure is expenditure on cultural tourism. This kit recommends the latter unless you have very good estimates of visitor numbers to your destination (these are usually available for tourism regions, but rarely for towns or localities).

The value of calculating visitor expenditure on cultural tourism is both to let people know the economic impact of existing resources, and to quantify a baseline from which to measure the impacts of change. If your destination is moving away from cultural tourism, you may be able to indicate the risks involved in such a move. If the destination is trying to decide whether to invest more in cultural tourism, you may be able to indicate the potential returns on that investment, or to set goals for those returns.

Pointers:

- Check with your local or regional tourism organisation to see what tourism statistics are already available.
- Is there the opportunity to build the survey questions into existing tourism or business surveys now, or in the future?

4.1 Visitor survey

Running a visitor survey can be a resource intensive experience. The survey will provide valuable general information about visitors as well as specific expenditure information so it may be of great interest to local and regional tourism groups and tourism businesses.

The visitor survey process may take two or three weeks to collect data, another week for data entry and another week or two to analyse the results. You may also want to repeat the survey at different times of the year and every couple of years to see how visitor characteristics are changing.

To create a visitor expenditure survey you will need:

1. Your list of themes to complete the survey form
2. Access to visitors through Visitor Information Centres, transport terminals, city centre or other places (not commercial cultural products) where tourists congregate
3. Interviewers or some process for visitors to complete and return the survey forms.

4.2 Interviewing

If collecting your survey using interviews, it is important that your researchers are fully briefed and trained. The interviewer services as a link between you and the visitor when conducting the survey, so it is important that they understand why the survey is being conducted, and can interpret any feedback provided by the visitor. In addition to understanding the purpose of the survey, the interviewer must also be very familiar with the questions. It is a good idea to get interviewers to read the questions out loud, either at home by themselves, or to other interviewers being trained.

Approaching visitors as potential respondents is often the most difficult part of interviewing, so in order to provide both consistency and confidence it is a good idea to provide interviewers with a script that they can follow. An example of an introductory spiel is included on the questionnaire. Conversely, the way an interview is finished is also important, and interviewers should be reminded to always thank respondents for giving up their time to complete the interview. Respondents should also have the option of being provided with contact details of the person or organisation conducting the survey in case they wish to get further information from you. Here are a few tips to help interviewers conduct quality interviews:

1. Ask the questions exactly as they are worded
2. Ask the questions in the order that they appear
3. Ask all of the questions – don't assume answers to questions
4. Don't rush the respondent
5. If the respondents offer open ended responses or comments, record them verbatim
6. Make sure you are speaking at a pace that is easy to understand and follow – if you talk too fast, respondents will not be able to absorb the question you have asked them

7. If a respondent seeks clarification about a question or does not understand what is being asked, try repeating the question. If further explanation is needed, make sure that you don't actually answer the question on the respondent's behalf
8. Don't forget to thank the respondent for their time at the end of the interview.

4.3 Who to approach

To ensure that a random sample is collected, it is important that the same procedures are followed each time an interview is conducted, or a visitor is approached to complete a questionnaire. If you are just leaving the questionnaires for visitors to pick up by themselves, make sure they are in a prominent place, and that there is a clear place for completed surveys to be returned. A common method is to place a box next to the uncompleted surveys for the completed surveys to be returned.

The easiest way to conduct interviews is to have the interviewer stand still, with visitors walking past them. Make sure the interview area has a good flow of people, but that you will not be in the way by conducting an interview. As each interview is completed, interviewers should be instructed to check that the questionnaire is complete and legible, and then approach the next person to pass them. Alternatively interviewers can be instructed to approach the third person etc. The important point is that the same procedure is followed for every interview.

4.4 How many respondents?

Unfortunately there is no simple answer to the question of sample size. The size of your sample will depend largely on how many questions you wish to analyse, and therefore the length and complexity of your survey. A fairly simple and brief survey may only require a sample of 150 respondents to be deemed as an acceptable sample. In contrast, a much more complex and lengthy survey, for example examining economic impact of an event, will require a much larger a sample size (often over 400) to be deemed a valid study. For this study we suggest you aim for a sample size of at least 300 completed surveys.

The following survey instrument has been developed to collect important information however it will need to be updated to suit your destination. You should perform the following updates:

1. Insert your destination name in the introduction
2. Change all references to Bunbury to your destination name
3. Replace the cultural themes in 'Cultural attractions' question 5 with themes drawn from your mapping analysis
4. Change the answer options for question 3 in Cultural attractions section to reflect your destination (first option) and State (second option).

4.5 Visitor survey instrument

Introduction

You have been invited to participate in a study which aims to assist the Bunbury region in valuing the contribution of cultural tourism. Although participation in the survey is voluntary, we would greatly appreciate your assistance. Your responses are anonymous and all information will be treated in a confidential manner. Your right to withdraw from the survey without need for a reason to be given, and at any time, will be respected. Your consent for participation in this study will be assumed upon completion and return of this questionnaire.

TRAVEL BEHAVIOUR OF VISITORS TO BUNBURY

We would now like to ask you a few questions about your trip to Bunbury.

1. How many times have you previously visited Bunbury? _____

2. What is the purpose of your trip to Bunbury? (tick all which are appropriate)

- | | |
|--------------------------------------------|--------------------------|
| Specifically to visit cultural attractions | <input type="checkbox"/> |
| Visiting friends or relatives | <input type="checkbox"/> |
| Business | <input type="checkbox"/> |
| Holiday/ leisure | <input type="checkbox"/> |
| Personal or other reasons | <input type="checkbox"/> |

3. How many days (or part days) will you be staying in Bunbury? _____

BUNBURY'S CULTURAL ATTRACTIONS

4. Please rate how important the cultural aspects of Bunbury were in attracting you to visit.

Not important at all		Very important

5. Please rate how important each of the following themes were in attracting you to visit Bunbury.

a) *Water & Maritime Heritage*

Not important at all		Very important

b) *Built Heritage*

Not important at all		Very important

c) *Visual/Public Art*

Not important
at all

Very
important

d) *Aboriginal Heritage*

Not important
at all

Very
important

6. If the cultural aspects of Bunbury did not exist, where would you have gone on this visit?

- I would still have visited Bunbury
- I would have travelled somewhere else in Western Australia instead
- I would have travelled to some other Australian state or territory
- I would have travelled to some other country
- I would not have travelled away from home at all

EXPENDITURE

In order to determine the value of cultural tourism in Bunbury we would like to ask you a few questions about your expenditure during your visit.

7. Is this trip part of a package tour?

- Yes No

(if no go to question 10)

8. How much is the package per person? \$ _____

9. How many days (or part days) in Bunbury does it cover? _____

10. During your visit to Bunbury how much do you think your expenditure (apart from what you have spent on your tour package) will be for you and your (immediate) group?

Accommodation	\$ _____
Meals and beverages	\$ _____
Transport (only include petrol purchased in Bunbury)	\$ _____
Entertainment	\$ _____
Shopping	\$ _____
Other expenditure	\$ _____

11. How many people does this expenditure cover (include adults and children)? _____

DEMOGRAPHICS

12. What is your gender?

- Male Female

13. Which age bracket do you belong to?

- 18-24 25-34 35-44 45-54
 55-64 65 +

14. What is the postcode (or country if you live outside of Australia) where you normally live?

Thank you very much for your time

5 Analysis of visitor expenditure

Being able to attach a dollar figure to, or identify the proportion of total tourism income attributable to cultural tourism can send a strong message about the performance of cultural assets and themes in a tourism sense. It may be that cultural assets (particularly those that are managed by public agencies) are undervalued as a resource for sustaining and growing tourism in the destination. It may be that visitor perceptions of the value of cultural themes and assets are different to those of the tourism and cultural sectors.

Investment in cultural assets for tourism purposes needs to be understood in the context of visitor needs, expenditure patterns, and the opportunities for return on investment. If visitors have a strong attachment to your cultural themes (as indicated by a high proportion of attributable expenditure), further investment to strengthen these themes may be warranted. If visitors do not have a strong attachment, then there may be a need to review how your cultural identity is commodified and promoted.

5.1 Direct spend research method

To determine the levels of visitor expenditure within your region as a result of cultural tourism, you can undertake a research method known as *direct spend*. This methodology has been used to determine the value of tourism and recreation in National Parks, Marine Parks and Forests by the Sustainable Tourism CRC (Carlsen and Wood, 2004) and has been widely accepted as a methodology for such research in tourism.

In this instance, the method uses visitor spending to measure the direct economic value of cultural tourism within a region, utilising a visitor expenditure survey. The survey will also help you determine visitor characteristics (demographics), visitor behaviour (visitation, length of stay, destination drivers), and the cultural themes visitors recognise.

The visitor behaviour section of the survey is also important for determining the proportion of visitor expenditure that can be attributed to cultural tourism.

5.2 Analysing the data³

There is some work to be done in calculating the key results from the visitor survey. Those results respond to the questions:

- How important are the cultural themes and assets identified in the mapping process in attracting visitors to the destination?
- What proportion of visitor expenditure can be attributed to cultural themes or assets (if you have an estimate of total visitor numbers)?
- What is the amount of visitor expenditure directly related to cultural tourism themes or assets?

³ For further information about the science behind this analysis, see Carlsen, J. and Wood, D. (2004) *Assessment of the Economic Value of Recreation and Tourism in Western Australia's National Parks, Marine Parks and Forests*. Gold Coast: Sustainable Tourism Cooperative Research Centre (available online at www.crctourism.com.au/bookshop).

5.3 Substitution factor

The first of these is readily determined by comparing the number or percentage of respondents who rated cultural assets and themes as important to their visit in the second section of the survey. This will include a 'substitution factor' which is simply the percentage of visitors who would not have visited the destination if it weren't for the cultural themes and assets. The substitution factor can be further broken down into the percentage that would have visited other places (in the same state or territory, in Australia, or overseas) or not left home at all. The substitution factor helps you decide whether your cultural tourism is shifting demand from other destinations, or creating new markets.

5.4 Attribution factor

The second analysis question requires calculation of visitor expenditure and an attribution factor (that is, how much of that expenditure can be said to relate directly to cultural assets and themes). The proportion of visitor expenditure directly attributable to cultural themes and attractions is:

visitor expenditure x attribution factor

If you know how many visitors come to your destination each year, you can estimate a total expenditure relating to cultural tourism. The formula would be:

***average visitor expenditure per person (from the survey) x
number of visitors to the destination x
attribution factor***

= total expenditure relating to cultural tourism

Pointer:

- Visitor numbers and visitor expenditure figures can be attained through State Tourism Organisations or Tourism Research Australia.

The following sections show you how to calculate each of these variables. We describe calculations for the total sample for your survey. You can use other questions in the survey (either ones we have in there or ones of your own) and repeat the analysis for specific markets (those visiting friends and relatives, for example) by including only those in your sample who had the market characteristics in your calculations. You could also calculate visitor expenditure related to specific themes (Question 5, 'Cultural attractions') by replacing the importance ratings in the 'attribution factor' with the importance rating for that theme.

5.5 Visitor expenditure

Your survey provides a total visitor expenditure for the sample. The total expenditure for a visitor group is the sum of all values in Questions 8 and 10 in the 'Expenditure' section of the survey.

For each group (i.e. each completed survey), you need to divide this total by the number of people the expenditure relates to (Question 11 in the 'Expenditure' section) and the number of days (Question 3 in the 'Travel behaviour' section) or part days the respondent will spend in the destination.

For example:

Respondent 1 is on a two day package tour to the destination, but is staying four days overall. She is travelling with her sister and two children. The respondent answers the key questions in the following way:

TRAVEL BEHAVIOUR OF VISITORS TO BUNBURY

...

3. How many days (or part days) will you be staying in Bunbury? 4

EXPENDITURE

In order to determine the value of cultural tourism in Bunbury we would like to ask you a few questions about your expenditure during your visit

7. Is this trip part of a package tour?

Yes No

(if no go to question 10)

8. How much is the package per person? \$ 235

9. How many days (or part days) in Bunbury does it cover? 2

10. During your visit to Bunbury how much do you think your expenditure (apart from what you have spent on your tour package) will be for you and your (immediate) group?

Accommodation	\$260
Meals and beverages	\$480
Transport (only include petrol purchased in Bunbury)	\$50
Entertainment	\$100
Shopping	\$200
Other expenditure	\$20

11. How many people does this expenditure cover (include adults and children)? 4

The average daily expenditure for this visitor is:

Total amount spent (Expenditure Q8 plus all items in Expenditure Q10) = **\$1345**
divided by number of days or part days = **4** divided by number of people = **4**

$$\mathbf{\$1345 \div 4 \div 4 = \$84.06}$$

You need to make the same calculation for each completed survey.

The total expenditure for this sample is:

To calculate the total expenditure for your sample, you need to ascertain key information from each of the surveys completed. As an example, we have estimated expenditures, length of stay and number of visitors in a survey sample of 300. The estimated figures are as follows:

1. The average of all average daily expenditures = \$78.15
2. The average of number of days as recorded in Travel behaviour Q3 = 6.3
3. The total number of visitors as recording in Expenditure Q11 = 487

To calculate total expenditure for this example you:

1. Calculate the average of all average daily expenditures
2. Calculate the average of number of days
3. Sum the total number of visitors
4. Multiply each of these figures to calculate total expenditure:

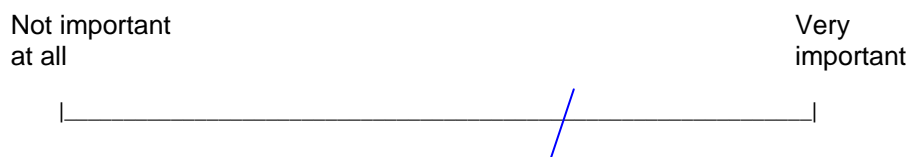
$$\mathbf{\$78.15 \times 6.3 \times 487 = \$239,772}$$

5.6 Cultural tourism expenditure

Now you have a total expenditure for your sample, you can estimate the proportion of that expenditure attributable to cultural themes and assets. This information comes from responses to 'Cultural attractions' Q4:

BUNBURY'S CULTURAL ATTRACTIONS

4. Please rate how important the cultural aspects of Bunbury were in attracting you to visit?



While there are some advanced statistical techniques you can use to calculate an attribution factor from the results to this question, the simplest is to average the value of the answers.

While an average response of '6.5' for example means nothing in terms of commenting on the overall importance of cultural assets and themes, it can be converted to an attribution factor for our purposes. The attribution factor is expressed as a percentage. For this example it would be 6.5 as a percentage of 10 (6.5 divided by 10 multiplied by 100) which is 65%.

We can say that an estimated 65% of total visitor expenditure is attributable to cultural themes and assets. From our previous example, we could estimate that our sample spent \$155,852 in the destination as a direct result of its cultural themes and assets.

Session 4

6 Business indicators

The economic value of tourism in regional destinations is driven by the business community. Efforts in destination marketing and infrastructure development support or build on the success of businesses. Regions with high visitation but low business engagement may struggle to profit from tourism. Strategies aimed at specific types of tourism such as cultural tourism needs to involve businesses in identifying commercial opportunities.

In this session we will:

1. Understand the value of business surveys in estimating the value of cultural assets in supporting employment and business income
2. Identify instruments to record business surveys
3. Explore business interviewing techniques.

Being able to make a statement about the level of attachment of businesses to cultural tourism themes sends a strong message to investors (public and private sector) and regional development interests that cultural tourism plans and initiatives will have support and will deliver benefits in terms of business income and employment.

Regional tourism destinations may be subject to high levels of income leakage where visitor expenditure on goods and services consumed in the visit to the destination is paid to businesses outside that destination. For example, if the chicken or beef consumed at a restaurant is purchased outside the region the amount paid for the commodity by the restaurateur is considered a leakage of the visitor expenditure. Even destinations with a high proportion of visitor expenditure attributable to cultural themes and assets may find that local businesses do not feel they benefit from this expenditure. In other situations, a lack of attachment to cultural themes by tourism businesses may mean they do not recognise the value of those themes to their customers.

6.1 Conducting business surveys

A relatively simple business survey can be conducted to assess the strength of attachment to cultural tourism themes and the extent to which these themes are seen to flow through to business income and employment. The survey is really a starting point for a consultation with business managers about how they would like to see cultural tourism develop, and what cultural themes mean to them.

Surveying and interviewing twenty or thirty tourism related businesses (accommodation, tour operators, attractions, and restaurants) might take a week. It is much preferable to do these surveys yourself rather than to outsource. Businesses may feel uncomfortable talking about their income or employment, so the survey asks about the proportion of income and employment attributable to cultural tourism. Even if businesses hesitate to answer those questions, they may provide useful information about their perspectives on cultural themes.

Pointer:

- Look for what existing research is available and what can be supplemented.

6.2 Who to interview

The participants in this stage of the research should be business owners or managers in your destination who have some interest or involvement in tourism. They might be from the more direct tourism sectors of accommodation, tour operators, attractions or cafes and restaurants. In some destinations (particularly smaller ones) you may also want to survey and talk to businesses that have contact with tourists even though that may not be their core business. This might include managers of pubs and clubs, newsagents and convenience stores.

In a very small destination with only a dozen or so of these types of businesses, you might want to survey and interview every one who is willing to participate. In larger destinations, you should select between 20 and 30 businesses as a minimum to survey and interview. You can survey and interview more, and this might improve the data you get, but interviews are time consuming (for the interviewer and the interviewee) so you will need to balance the expense with your expectations of getting different answers from businesses you have yet to interview.

Try and follow these principles in making your selections:

- Select two or three businesses from each key sector
- Do not just select businesses overtly engaged in cultural tourism (these will in fact provide the least useful data!)
- Do not just select businesses who have been heavily involved in the local tourist association or local visitor information centre – try and get some businesses who are less involved in these destination wide activities
- Reassure potential respondents that you do not want to talk to them about their income or other commercially sensitive material, you are interested only in their attitudes to cultural tourism and what cultural tourism might mean to their business.

6.3 Collecting the data

We recommend collecting the data in a relatively formal way through a survey and an interview. We have devised a recommended set of questions that will provide the basis for a half hour interview with business owners or managers. The interview will allow time for a more broad ranging discussion on cultural themes and the level of support for cultural tourism initiatives. You may choose to record the interviews, but you will need to get the participant's consent to do so. You also need to let the participant know what information you are recording and what it will be used for.

We recommend using the respondent information sheet as a pro-forma for informing participants and having them agree to participate. You can give them a copy of this as a letter before you conduct the interview. Make sure you have read this pro forma carefully, as it describes your responsibilities under the Privacy Act and standard protocols for conducting ethical research.

6.4 Business survey instrument

The following cultural tourism business questionnaire is an instrument designed to allow you to directly measure businesses response to various questions. Similarly to the visitor information survey discussed in the previous section, the business survey instrument provides you with a tool to record business responses.

Cultural Tourism Business Questionnaire

You have been invited to participate in a study which aims to assist the [insert destination/location] region in valuing the contribution of cultural tourism. Although participation in the survey is voluntary, we would greatly appreciate your assistance. Your responses are anonymous and all information will be treated in a confidential manner. Your right to withdraw from the survey without need for a reason to be given and at any time will be respected. Your consent for participation in this study will be assumed upon completion and return of this Questionnaire.

For the purpose of this questionnaire, cultural tourism is defined as:

‘the business of providing and interpreting a place’s culture to visitors – including its lifestyle, heritage, arts and people – in a way that helps visitors understand what makes that place distinctive’ (Creative Nation, 1994, Commonwealth of Australia).

- (a) Please complete the questionnaire as fully as possible. Feel free to make additional comments if you feel they may be helpful.**

- (b) If you have any inquiries contact:** [insert contact details here]

This survey is strictly confidential.

At no time will individuals be identified in the results reported.

Cultural Tourism Business Questionnaire

1. What is the nature of your business? _____

2. How long have you been in the current business? _____

3. Please rate how important you feel the tourism industry is to the Bunbury economy.

Not important
at all

Very
important

|_____|

4. Please estimate the percentage of your customers that are tourists and/or tourism businesses.

0%

100%

|_____|

5. Please estimate the percentage of your income that comes from tourists and/or tourism businesses.

0%

100%

|_____|

6. Please rate how important you feel cultural tourism is to the Bunbury economy.

Not important
at all

Very
important

|_____|

7. Please rate how appropriate you feel the Water & Maritime heritage theme is for Bunbury tourism.

Not appropriate
at all

Very
appropriate

|_____|

8. Please rate how appropriate you feel the Built heritage theme is for Bunbury tourism.

Not appropriate
at all

Very
appropriate

9. Please rate how appropriate you feel the Visual/public theme is for Bunbury tourism.

Not appropriate
at all

Very
appropriate

10. Please rate how appropriate you feel the Aboriginal heritage theme is for Bunbury tourism.

Not appropriate
at all

Very
appropriate

Thank you very much for your time

Are you interested in feedback? If you would like a summary of the results from this survey please provide details below.

Address for feedback:

6.5 Analysis of business interviews

To analyse the results for questions 3 through to 10 you will need to measure the response given (on a scale of 0 to 10) and enter this figure directly into your database.

For example, if a respondent marked their response to Question 3 in the following manner, their score would be 7:

Q3. Please rate how important you feel the tourism industry is to the Bunbury economy.

Not important
at all

Very
important



You can then calculate an average result for each question. To do this, enter responses to each question from all participants in your sample. Then, divide this number by the number of respondents in your sample. This will provide you with an average result for each question.

For example, to ascertain the average result for Question 3 you would:

1. Calculate the total of 30 responses to this question = 196
2. Divide the total by the number of respondents in the sample = 30

The average result is thus $196 \div 30 = 6.5$.

Respondent information sheet

You may choose to use the following as a pro-forma for a letter to businesses you wish to participate in your survey.

You have been invited to participate in a study being conducted by the [NAME OF YOUR ORGANISATION]. The project aims to assist the [NAME OF YOUR DESTINATION] region in valuing the contribution of cultural tourism. Data will be used to help plan future cultural tourism projects for the destination.

Procedures to be followed:

Participants will be asked to fill out a questionnaire then be interviewed by [YOUR NAME AND ROLE]. Interviews for this research project will be semi-structured conversations covering some or all of the topics listed below. The place and location of the interview is of your choosing, with telephone interviews arranged if that is more convenient for you.

Interviews typically take between half an hour and an hour. If it is necessary, your permission will be sought to extend an interview beyond one hour. If you agree the interview will be recorded on audio tape, however, you are free to request that interviews not be taped. In this case I will request permission to take notes during the interview.

In some cases more than one interview may be required to cover the interview topics in sufficient detail, however, additional interviews may not be possible for you. Any time you can give to this project, no matter how short is gratefully acknowledged.

At some stage after the interview the audio-tape will be transcribed (or the interview notes typed). The transcript will be returned to you for checking, and any changes you wish to make will be incorporated in the final version of the transcript/notes.

Possible discomforts and risks

We recognise that there may be discomfort on the part of the participants in discussing financial information as part of the study. Financial information will be treated with confidentiality. The storage and treatment of this data and all data relating to this project is explained below. Your right to withdraw from this project without need for a reason to be given, and at any time, will be respected.

Your right to privacy and the security of records

Original records of interviews, including notes, transcripts and audio-tapes (if you consent to the interview being recorded), will be kept in a locked and secure place at [NAME OF THE ORGANISATION].

You have the right to remain anonymous when any data from the survey or interview is published. Should you consent to being identified in any publication using interview data, a final version of the material to be published will be sent to you for your permission prior to publication.

Should you wish to allow access to documents, records or photographs, you may determine the terms under which access is allowed. This access will be subject to privacy requirements regarding identification of third parties.

Your right to withdraw from this project without need for a reason to be given, and at any time, will be respected. On your withdrawal, all copies of notes, tapes and transcripts will be returned. Information from you which has been 'de-identified' (i.e. not able to be linked back to you) will not be able to be withdrawn.

Responsibilities of the researcher

Any information that is obtained in connection with this study and that can be identified with the subjects will remain confidential and will be disclosed only with their permission.

Responsibilities of the participant

Please answer all our questions as openly and honestly as you can to ensure that we produce high quality research. If you are unable or unwilling to answer specific questions, please inform us immediately.

Information sought

The interviews will use the following questions to provide a framework for discussion:

What % of your customers are tourists?

What % of your income comes from tourists?

How important is tourism to the viability of your business?

How important do you think cultural tourism is to your customers / visitors?

How important do you think theme A is to your customers?⁴

Inquiries

If you have any questions, we expect you to ask us. If you have any additional questions at any time please ask: [INSERT INTERVIEWER NAME HERE]

OR if you have any problems associated with this project, please contact: [INSERT YOUR MANAGER'S NAME HERE]

⁴ Insert your own themes here, and ask the question again for each theme you identified in the asset mapping process

Part A: For the participant to complete

<input type="checkbox"/>	I have read and understood both pages of the introductory letter regarding research on the value of cultural tourism.
<input type="checkbox"/>	I am over the age of 18 years and would be pleased to be involved in the project.
<input type="checkbox"/>	I agree to my interview being recorded on audio-tape OR
<input type="checkbox"/>	I do not agree to my interview being audio-taped and prefer the researcher to take hand written notes
<input type="checkbox"/>	I wish to remain anonymous in any publication arising from this research, OR
<input type="checkbox"/>	I consent to being identified in any publication arising from this research, on the understanding that I approve a final version of the material containing my name
<input type="checkbox"/>	I understand that all references in my interview to third parties will not be incorporated in published work unless the third party consents.

Your name:

Your signature: Date:

Name of witness:
(independent of the project)

Signature of witness: Date:

Date:

Part B: For the researcher to complete

I certify that the terms of this research have been carefully explained to the participant by letter and follow-up discussion (if any), and that the participant appears to have understood.

The participant has indicated the following restrictions are placed on any data generated during the research (note if none apply):

.....
.....

Name of researcher:

Signature of researcher: Date:

You will be given a copy of this form to keep

WORKSHOP THREE

Local government implications

Session 5: Local government and tourism

Session 5

7 Local government and tourism

An important outcome for the purposes of this kit is an assessment of the current and intended contribution of local government to managing cultural themes and assets.

Local government plays an important role in the provision and maintenance of infrastructure for tourism – including cultural tourism assets and the common infrastructure used by cultural and other tourists. There has been increasing pressure on local government to justify tourism spending and to prioritise resident and visitor oriented programs. Local government is generally willing to invest in initiatives which will benefit its economic and community development objectives. Tourism promotion, industry assistance, infrastructure development and sponsorship are examples of such investment. Cultural asset and theme management is sometimes but not always undertaken with a tourism view.

The information gathering in this section will open dialogue with Council on how the destination identity is represented and what balance might be struck between investment for residents and investment for visitors. Assets which are valued by residents may also be valued by visitors and this might provide extra incentive for Council to invest in cultural assets.

In this session we will:

1. Explore the benefits of the new Tourism Impact Model (TIM)
2. Understand what local government spends on cultural tourism
3. Understand how a community benefits from local government investment in cultural tourism.

7.1 Tourism Impact Model

The TIM was developed by the then Commonwealth Department of Industry, Tourism and Resources (DITR), now the Department of Resources, Energy and Tourism (RET) as a tool to assist local government assess the costs and benefits of tourism. During the Australian Government's extensive consultations as part of the development of the Tourism White Paper, local governments identified several needs, particularly in the area of accessing information.

The model was developed by DITR and released to councils in March 2004. In June 2005 DITR released an update of data. While the TIM takes advantage of nationally consistent data collected as part of the International and National Visitors Surveys, local governments then apply their own expertise and data to the TIM.

In early 2007, DITR redeveloped the TIM to make it more user friendly. The new TIM allows internet based access and functionality and allows councils to assess multiple projects and compare the financial impact of several proposals or scenarios. TIM may be used to respond to council enquiries for assistance in determining:

- The impact of tourism on their budgets
- How much to charge tourism developers
- The costs and benefits of festivals and events
- The infrastructure in which to invest, and
- The types of tourist to target.

The TIM provides a method for generating the required information. Information on visitors relates to money spent in the council area and its impact on jobs and population change, and the relationship of these to council spending, income, rates, charges, grants and so on.

Data is collected on council activities that can be associated with tourism, showing the cost and income associated with each and the operating balance. These are subdivided into discretionary and non-discretionary activities, and include such items as visitor information centres, marketing and event administration, park precincts, roads and streetscapes, museums, leased properties, swimming pools, parks and gardens. It is possible to identify activities which are profitable, self-funding or incurring deficits. The generic growth-related impact on the council budget is calculated from data on operating expenses and income from rates, grants and subsidies. A table can be generated to show a summary of this data at various geographic scales.

The TIM has considerable flexibility. It shows the costs incurred by councils because of tourism and allows for additional inclusions as they are identified. It can incorporate seasonal fluctuations, and distinguish income for council from income for the local economy. It can differentiate council areas in terms of input effectiveness, and can help clarify key council roles with respect to tourism.

While the TIM has been adopted by many local councils you will need to determine if it is/has been implemented. The details below refer to a TIM that is in place. If this is currently not the case in your area the Crafting Regional Growth project can provide an opportunity to commence a dialogue to encourage your local council to use the TIM.

Councils need to use the individual logon and password which was emailed to them in January 2007, and tourism development officers will need to contact the local government authority in order to arrange for possible access to the local council's logon and password if they agree.

Officers will need to be able to access the Divisions in the council who contribute to completing the TIM:

- Tourism and Promotion unit
- Building Construction and Maintenance
- Corporate Services
- Economic Development
- Cultural/ Community units, including Event Coordinators
- Environmental Health Services
- Planning Services
- Social Planning
- Parks and Recreation
- Ranger Services
- Engineering Services.

The TIM document proposes a method for collecting the data to fill in the model. What we are concerned with here is the role that cultural assets and themes play in the overall connection between local government and tourism. The first task is to complete the TIM, and then you can analyse the role of cultural tourism. To do this, you may need to conduct interviews with the local government representatives who were involved in completing the TIM. The ideal situation (if you have not already completed a TIM for your local government) would be to include these additional questions below while collecting information for the TIM.

You need to ask them:

- Which of the expenditures covered in the TIM do they consider to be expenditures on cultural assets?
- What proportion of their expenditure on cultural assets do they consider to be for tourism as distinguished from being for residents?
- Are there cultural assets which they would describe as 'discretionary expenditures' and which as 'non-discretionary expenditures'?

7.2 Data Detail

One of the most important things to remember when using the TIM is to take the time to obtain and input the data about your area. This is often a daunting task, but a valuable one which serves a dual purpose of not only obtaining data for the model, but of alerting other council officers of the far reaching affects of tourism.

A case study of Wellington Shire Council's (Victoria) experiences in using the Model was presented at the 2004 Australian Regional Tourism Convention. A summary of this presentation is included in the 2004 convention handbook available at www.regionaltourism.com.au.

You need to be able to respond to the following questions –

- What level of commitment does our local government make to tourism?
- How significant are cultural assets as a component of this commitment?
- What does the TIM say about the return on investment for local government in relation to tourism?
- What do our visitor and business surveys suggest is the contribution of cultural tourism to this return on investment?
- How well do the local government investments in cultural tourism assets align with the themes suggested by the various other participants in this research?

7.3 Case study: local government investment in cultural tourism

We were provided with access to a number of different planning and strategic documents by Bunbury City Council. The following figures were taken from the financial statements for 2003–04 and the Principal plan of activities (draft) documents. The Bunbury City Council invests in a number of cultural assets on an annual basis and also acts in partnership with other government agencies and stakeholders in attracting funds to support major capital works programs.

Over the 2003–2004 financial year, the total amount of operational expenditure injected into a number of cultural institutions and cultural development of the city was \$1.2 million. Within its 'Principal plan of activities' document, the Bunbury City Council aims to seek further funding, in partnership, to the amount of \$6.8 million for the development of new cultural assets. A Cultural Development Officer role was created three years ago and has an overall responsibility in developing and planning for the cultural needs of the community. Sonya Dye, Cultural Development Officer, has played a key role by contributing to a number of scopes of work and briefing documents used to form the council's strategic plan.

We found this to be quite unique and a clear demonstration of the level of importance given to the city's 'cultural health'.

Ms Dye stated 'we see ourselves as facilitators amongst the community. We provide expertise and advice for different organisations that assist them with their potential product development.'

A monthly e-bulletin that contains information about local artisans and their exhibitions is one promotional tool that has national circulation. It's a really great example of how a destination receives recognition through individual art workers 'and that's valuable to us as a cultural destination. If art work is successful elsewhere, this is a good thing for Bunbury,' Ms Dye explained.

Overall the Bunbury City Council does appear to have a progressive stance on cultural investment and this has been evidenced by its strong financial commitment, recognition of built heritage and public art as economic assets, use of waterways and water as a theme throughout its promotional material and recognition of Indigenous Heritage as integral to the City's history and its future.

'Our council is very supportive and proactive,' stated Ms Dye, 'when presented with a good argument for investment into art and culture.'

BUNBURY CITY COUNCIL FINANCIAL STATEMENT 2003–04

Deliverable	Organisation	Investment Amount	Type of Expenditure
Regional Museum	Various stakeholders	\$4.8 million	Capital - 2006-07
Proposed Exhibition Centre		\$2 million	Feasibility and Construction
New Visitor Information Centre	City of Bunbury	\$840,000	2006
Festivals & Special Events	City of Bunbury	\$157,000	Operational
Visitor Centre management	City of Bunbury	\$333,589	Operational
Heritage Strategy	City of Bunbury	\$19,625	Operational planning studies
Urban Landscape & Precinct Program	City of Bunbury	\$527,751	Capital Expenditure
Cultural Development	City of Bunbury	\$740,714	Cultural Development Officer Arts newsletter Arts database Public Art Policy and maintenance Arts and Cultural Events Bunbury Literary Award
	Bunbury Regional Art Gallery	\$161,777	Operational
	Bunbury Regional Entertainment Centre	\$280,000	
	Stirling Street Arts Centre	\$22,220	
	King Cottage Museum	\$5,000	
	Combined Schools Music Festival	\$550	
	SW DramaFest	\$500	
	Bunbury Historical Society	\$400	
	Gwaba Enterprises Aboriginal Group	\$700	

WORKSHOP FOUR

Speaking out

Session 6: Selling the message

Session 7: Cultural tourism innovation

Session 6

8 Selling the message

Once you have undertaken each of the components of the kit, you will have developed the basis of four key messages about cultural tourism in your community. In order to foster innovation and grow the benefits of cultural tourism in the region, it is important to communicate the essence of each of these messages to your stakeholders.

In this session we will:

1. Develop strategies to communicate the value of cultural tourism to community and investors
2. Develop strategies to grow cultural tourism in the region
3. Identify techniques that might be used to give more information about the value of cultural tourism.

An appropriately informed, involved and empowered community can play a key role in supporting the local cultural tourism industry, including lobbying for support from the local government. Learning from experiences with raising the awareness of tourism in general to the community, Rosemann & Prosser et al. (2000) suggest that some of the challenges include:

- *Responsibility* - lack of leadership, as often no organisation takes responsibility for this role;
- *Resources* - funding and time, where tourism associations and local governments focus their resources solely on selling destination to tourists and not on selling tourism to residents;
- *Research* - lack of specific local data including business statistics to support arguments;
- *Perceptions* - residents often perceive tourism as disruptive failing to contribute to infrastructure;
- *Extent* - it is difficult to communicate the extent of benefits residents as it differs;
- *Media* - negative impacts are highlighted as they are often more immediate and newsworthy, and
- *Lag* - the benefits of tourism are not felt instantly and there is immediate response to changes or implementation of policy.

One barrier that this kit has helped overcome is that of research. After undertaking each of the components you will not only have informed messages to communicate, but you will understand the stakeholders with which you need to communicate with, and the forms that the messages should take in order to effectively communicate with each group.

8.1 Stakeholders

Before you can begin selling the messages that you have prepared about cultural tourism, it is important to understand who your stakeholders are, and therefore the audience you will be communicating with. Stakeholders are everyone who is affected by, can affect, or interested in a decision that is made about cultural tourism. This process of stakeholder identification will have been carried out while conducting your

asset mapping. The mapping exercise will have also informed you about the standpoints of each of these stakeholders, and their perceived importance of cultural tourism.

Once you have identified your stakeholders the next step in the process is deciding how to sell or communicate each of the four messages to each stakeholder or group. Different stakeholders will react differently to messages, depending on what is important to them either personally or professionally. For example local governments are generally less concerned with the actual number of cultural tourists visiting a region, but more so with the number of jobs and employment opportunities that have been created as a result of cultural tourism within that region.

Conversely, through asset mapping and business indicators, you will have determined how important businesses believe it is to promote their business in a way which reflects the cultural themes of the region. If cultural tourism is determined to contribute positively to your community, you may want to look at strategies to encourage businesses that do not use a cultural theme in their promotion to do so, and the benefits they will see as a result.

8.2 Developing your message

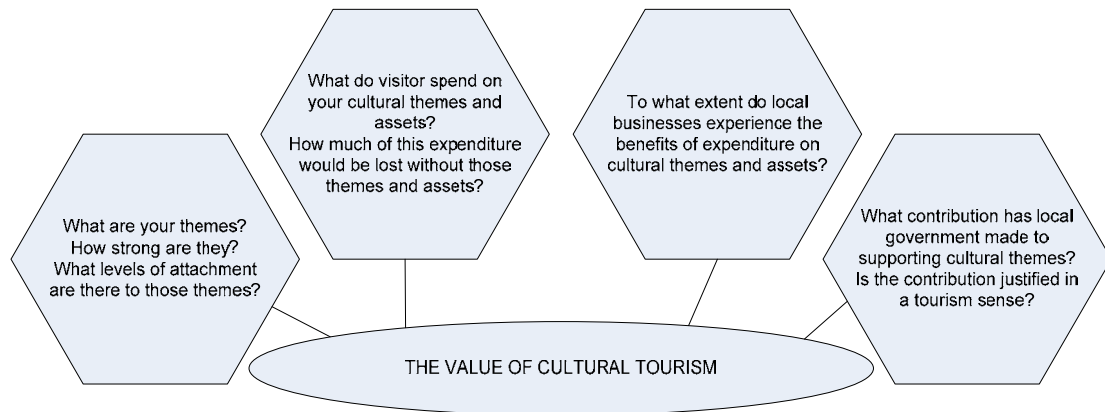


Figure .1 Collating the evidence for the value of cultural tourism in your destination

Message	Source of evidence
<i>The nature of cultural tourism assets and themes and how important these are to stakeholders including the community, local government, tourism sector and visitors</i>	Asset mapping – Themes and resources
<i>The economic value of cultural tourism.</i> For example, How much of the visitor expenditure in the community is dependent on cultural themes and assets? How much business income and employment relies on cultural themes and assets?	Visitor expenditure and business indicators
<i>The role of local government.</i> For example, What does local government do to support cultural themes and assets? What commitment is there from local government to provide a tourism focus for these supporting activities?	Local government implications
<i>To what extent can better planning / coordination of the cultural themes and assets (and their promotion) increase the value for stakeholders including the community, business, visitors and local government?</i>	Asset mapping and business indicators

8.3 Message delivery

Just as there are different ways to phrase each of the messages, there are also different ways in which you can deliver these messages. Activities include:

- Community meetings
- Tourism benefits campaigns such as ‘tourism week’.
- Local loyalty program including discounts on tourism product for the local community
- Promoting the availability of information at Visitor Information Centres as a community resource
- Visits by the tourism manager to various community group meetings (Lions, Rotary, Progress etc.)
- Involvement in local high school career days or fairs
- Articles in newsletters and brochures
- Online technologies
- Promotional collateral to be used by the community such as bookmarks, stickers and postcards.
- Industry and public events such as open days at the Visitor Information Centre
- Letterbox drops (direct mail) of letters and flyers
- Stories in the local media.

These are just a few of the strategies that have been previously undertaken by local governments and industry groups to help promote the benefits of cultural tourism and tourism in general. The Centre for Regional Tourism Research has produced a handbook for assisting people such as local government tourism officers undertake such campaigns. Entitled *Promoting Awareness of the Value of Tourism: A Resource Kit* (Rosemann & Prosser, et al., 2000), it can be obtained at www.regionaltourism.com.au.

Tourism Victoria and the Australian Regional Tourism Research Centre have adapted and updated this guide into *Talking Up Tourism*. Extracts from the booklet follow.

8.4 Public relations plan

Increasing awareness and building a positive perception takes time, so it's important to have a clear plan of how you intend to proceed. An effective program seeks to strengthen your presence in the wider community through consistent and relevant community-oriented publicity.

In planning a program, it is a good idea to include:

- The aims (what you want to achieve, why and by when)
- Any policies which should be adhered to
- Any priorities to be taken into account
- Target audiences to be reach (specific groups whether they are broad or quite narrow, such as the general community, the business community, kids, beachside residents, jazz lovers etc)
- Tools or distribution channels available (the means of communication), and
- Budget considerations.

Be specific with your objectives. Which aspects or facts about tourism in your region would you like to see promoted? Be consistent in following these aims through. Decide on themes or priorities and use them as a guide for press articles, speeches, displays etc. Give concrete examples.

Public relations involve a planned program promoting a positive understanding of tourism by affirming its value and role within the community. The scope of the community you target might be your town, district and region or further afield. Positive messages need to reach the broader community, the business sector and if applicable the government sector (local, state and federal) where you live.

Key points:

- Develop a plan with a budget and timetable
- Investigate cooperative opportunities available with the visitor centre, regional tourism organisation and state tourism organisation
- Analyse what is happening currently
- Consider a campaign theme. Each target group might need to know something different, but a theme can unify the program
- Be accurate, creative and consistent
- Plan actions that appeal to target audiences. Remember that self-interest is the key to appealing to most audiences
- Ensure ideas fit into the broader framework of your work or image
- Pre-test your messages on a smaller group or target public
- Determine whether appropriately skilled people are available to undertake tasks or if additional outside help is needed
- Be realistic in decision-making and projects taken on. Don't create work or financial burdens that can't be sustained
- Ensure timeframes and responsibilities are understood
- Allow for some two-way communication so that the community can reach you, contribute or provide feedback
- Evaluate the effectiveness of measures you take
- Be flexible and be prepared to change or adjust measures
- Keep all stakeholders informed
- Include relevant opinion leaders in publicity.

8.5 Raising your profile

A key to successfully communicating the significance of tourism is to develop your profile as a credible tourism advocate and to develop working relationships across the community. Not everyone is comfortable with networking but there are some simple steps that can help establish your standing.

You can:

- Become a regular attendee at the relevant social, political and industry gatherings
- Develop the right industry contacts in support of your goals
- Become involved in community groups, committees etc
- Maintain an understanding of community opinions, values and aspirations
- Become affiliated with national associations etc
- Become the catalyst for a tourism network of like-minded people
- Develop networks that reflect the diverse interest groups and industry characteristics of tourism.

8.6 Local MPs/elected officials

Local MPs and other elected officials will invariably be members of the local grapevine and should be aware of issues affecting community development. Becoming known in key industry circles will assist you in creating a public standing that will add credibility to your tourism advocacy.

Ideally, you will have established a constructive relationship with your local MP before you ever need to approach them seeking assistance on a tourism-related issue. Similar to the preparations required before engaging with the media, you should have a clearly articulated case to put forward, along with key messages and supporting materials, before lobbying your MP.

- Use dispassionate, professional language to make your case
- Gain support from your network/alliance members
- Avoid overstating your case, e.g. the potential of tourism, and support your assertions with data
- Integrate multiple forms of contact and influence to get the desired messages across
- Coincide lobbying with media coverage (if appropriate, sometimes applying public pressure can be counter-productive)
- Arrange meetings/site visits etc. with MPs/elected officials.

The amount of groundwork you undertake can influence how effective you are at selling your case lobbying your position to the relevant MPs. Adequate preparation provides you with a better chance of getting your message across and creating a compelling argument.

8.7 Meeting with MPs/elected officials

It is recommended that communicating the significance of tourism to an MP/elected official should occur both informally, whenever the opportunity arises, and in a scheduled, formal setting. An initial meeting to establish your credentials and interests will set the scene for ongoing constructive contact. If you are seeking support for a proposal, lobbying for a tourism development or addressing local issues, then a scheduled meeting can help focus an elected official's attention.

The skill of face-to-face lobbying is something that all campaigners should develop.

Tourism advocates are advised to:

- Be mindful of the constraints MPs face; don't waste their time
- Send a meeting agenda to the MP's office beforehand
- Don't overload the meeting with a range of different issues – stay focused
- Emphasise that you are an advocate of a network/alliance
- Remember that establishing a relationship with an individual MP also means establishing a relationship with their advisors/staff
- If dealing with multiple government departments then make it known that this is the case
- When articulating your proposals, be succinct, well prepared, well presented, focus on the positives
- Have relevant facts and figures at hand, even if the individual in question should already know them
- Prepare response to counter-arguments, particularly those posed by competing interest groups; if possible work towards win-win
- Don't be argumentative or confrontational – stay constructive
- Know when to concede that you don't know and offer to follow-up with the information at a later time
- Avoid hidden agendas
- Avoid conveying negative opinions about politics
- Listen carefully – look for indications of the MP's views and engage them in a conversation; don't lecture them
- Be prepared to make concessions and accept a difference of opinion
- Assume responsibility for tasks that are beyond the MP and their staff and offer to become an ongoing resource for tourism-related issues
- Identify issues of common interest
- Send a thank you note after your visit. If commitments were made at the meeting then repeat your understanding of them in writing.

Session 7

9 Cultural tourism innovation

This kit has enabled you to take a snapshot of the value of cultural tourism from a number of perspectives. While this is a very useful exercise in terms of increasing your understanding of the role cultural tourism plays in the economy of your destination, and gathering evidence to demonstrate the role to other stakeholders, it is clear that the nature and value of cultural tourism will change over time.

New potential and opportunities, as well as threats and limitations, will arise as businesses change, products change, and community and visitor attitudes change. It is the essence of our jobs as destination managers to be aware of the factors influencing change, and to try, where possible, to manage change so that it benefits our businesses and communities.

In this session we will:

1. Identify innovative cultural tourism destinations and products
2. Identify structural considerations including: economic competence, resource clustering, networks, entrepreneurship, critical mass, institutional infrastructure, production and distribution of knowledge and social, cultural and political capital.

Destinations may sometimes feel that they don't have the resources to manage change effectively. There is usually no shortage of ideas for innovation, but converting innovative ideas to innovation 'in the field' can be a challenging process.

Research shows that the successful innovation is reliant on a number of structural considerations. The considerations include economic competence, resource clustering, networks, entrepreneurship, critical mass, institutional infrastructure, production and distribution of knowledge and social, cultural and political capital.

9.1 Economic competence

This term refers to the financial support available for the project, as well as the ways in which such financial resources can successfully be managed and allocated. The winner of a NSW Cultural Tourism Award (1997) – The New Italy Museum – is an excellent example of how critical economic competence is in ensuring that new cultural tourism ventures reach their full potential.

Case study: New Italy Museum, NSW

New Italy Incorporated is a small, non-profit organisation comprising of members of the Italian community in the north coast area of NSW. The organisation is responsible for the New Italy Museum in Woodburn, NSW, a site aimed at recognising the contribution of the Italian community to the region. Essentially, the cultural tourism attraction run by New Italy Incorporated does not deal with large sums of money. In the early stages, the organisation did not receive very much external funding, and relied on money from its members. In fact, development of this site was only made possible because many of the members already had a lot of existing capital in terms of land and buildings from which the museum could be run. Furthermore, the museum does not

charge visitors an entrance fee, choosing to run self-sufficiently on small amounts of money from membership fees, volunteers, donations and the on-site store.

However, in 1999, the Incorporation was awarded a \$10,000 grant from the Italian Embassy, NSW branch. The Incorporation felt they needed some assistance in managing what, to them, was a large amount of funds. They approached Southern Cross University in Lismore to work with them on developing a project which would contribute to the Museum and the representation of the cultural heritage of the region. The main outcome of this was the establishment of an interactive website which included a virtual museum for New Italy, exposing more people to the site, and allowing interested people to become involved. In addition to this, the university had the means to link the organisation with key people and institutions, including relevant businesses, local government, academics that had expertise in Italian history of the region, as well as individuals who could contribute to the project in one way or another (e.g. supplying an on-site computer). By bringing in the external help of the university, the benefits of the funds were able to be maximised, and the New Italy Incorporation was left with outcomes that strengthened its capacity as a cultural tourism attraction.

9.2 Resource clustering

A relationship has been found between successful innovative systems and the geographical proximity of the individual assets, organisations and facilities that support them. For example, the closer the individual components of a cultural tourism project (customers, suppliers, local government, information providers, etc.) the more likely they are to succeed. While this may be possible in metropolitan areas, physical closeness of assets is not always realistic in regional areas. Resource clustering often becomes the mechanism to create a sense of 'geographic closeness' within these areas, and essentially means 'bundling up' or linking together similar assets in order to form a stronger product.

Case study: Cobb & Co Heritage Trail, NSW

The Cobb & Co Heritage Trail in regional NSW is one example of how resource clustering can build a strong cultural tourism theme that overcomes distance, and empowers cultural visitors to travel to rural areas. The Cobb & Co Heritage Trail is a self-drive tour that follows old coaching routes established by the Cobb & Co Transport System in the 19th century. The trail links together a series of heritage sites located between Bathurst and Bourke – basing itself around the Mitchell Highway but also including byways into small rural towns.

Given that the Cobb & Co Heritage sites are spread out over a geographical area that spans from the Great Dividing Range to the outback – or across ten local government areas – resource clustering became essential in this project. Had the individual towns decided to interpret their Cobb & Co heritage sites independently, the cultural tourism product simply would not have been strong enough to attract visitors. However, by working collaboratively to link each heritage site together, the involved council areas have given visitors a firmer reason to want to visit each town. In effect, the cultural tourism product has been more successful in turning each town along the trail into cultural tourism *destinations*; towns which visitors may well have bypassed otherwise.

9.3 Networks

Networks refer to the partnerships or support systems in place that help strengthen and assist new cultural tourism ventures. Networking is an important step in obtaining positive outcomes, as outlined by the mural project implemented by Sheffield in Tasmania.

Case Study: Sheffield, TAS

In the late 1980s, the rural town of Sheffield was declining both economically and socially: 'Something needed to be done if Sheffield were to be prevented from slipping into the spiralling descent toward economic oblivion' (Global Arts and Tourism 2004). A public meeting on the issue was held in 1985, which resulted in the formation of the Kentish Association for Tourism Inc. (KAT Inc.) that began networking almost immediately.

KAT Inc. had heard the success story of Chemainus, a small town in Canada that had pulled itself out of a similar predicament and gained broad recognition by painting murals on its town walls. KAT Inc. analysed the Chemainus project, in particular the reasons for its success, and set about trying to achieve a similar outcome. Following this research, KAT Inc. commissioned mural artist John Lendis to paint the first mural in the town of Sheffield, which was completed by the end of 1986. Since then, more than thirty murals have been painted in Sheffield, some by professional artists and some by community members. To reinforce the mural theme and strengthen the attraction even further, KAT Inc. broadened its network-base by spreading out the project to encompass other towns in the Kentish district, including Railton, Gowrie Park, Barrington, Roland and Wilmot, where a further twelve murals have been painted.

The project has achieved what it set out to do – igniting community spirit and attracting more tourists (and therefore more revenue) into the region. But perhaps the greatest indicator of success for the Sheffield project is its successful application to be the host of the 2008 Global Mural Conference. The conference is run by the Global Mural Arts and Cultural Tourism Association – an organisation founded in Chemainus – which aims to promote artists, towns and cultural events around the world. Winning this privilege certainly would not have come about had KAT Inc. (now renamed Sheffield Mural Arts and Rural Tourism) not have made those initial networks with Canada during its inception. 'Australia's Home of Murals' demonstrates how building networks within your community – and also outside of it – can greatly improve the success rate of your own cultural tourism project.

9.4 Entrepreneurship

Entrepreneurship centralises itself around the idea that for new projects to excel there often needs to be a leader who will direct the concept into actuality. This leader may be an individual, an agency or even a community group. The establishment of the Barcaldine theatre in North Queensland is an example of entrepreneurship in action – at both an individual and social level.

Case Study: Barcaldine Theatre, QLD

The Barcaldine theatre was built in the 1920s out of corrugated iron and became one of the most significant forms of entertainment for people in the immediate and surrounding community. However, with the advancement of technology, demand for the theatre lessened, and the theatre was closed for

many years. In the early 1990s, members of the Local Arts Council (LAC) recognised the site as an important characteristic of the town, as well as an asset which could solve some of the economic and social problems currently present in Barcaldine. There was a real need to provide the youth of Barcaldine with some form of entertainment, and it was also recognised that many locals were travelling three hours out of town to watch movies. Given the distance they had to travel, many locals would stay out of town for the entire weekend, and were therefore spending significant amounts of money outside of Barcaldine. To try and overcome all of these issues, the LAC set out to refurbish the theatre in the hope it could again be used as the town's cinema. The theatre reopened in 1995, becoming one of the most unique cinemas to currently be running in Australia.

The establishment of the theatre required entrepreneurship at a social level – it simply couldn't run without the assistance of the local area. Many local businesses have gotten behind the project by making financial contributions to the theatre, helping LAC to continue running the cinema programme. Furthermore, a number of volunteers from the LAC also dedicate a great deal of their time to the running of the theatre, by way of cleaning, ushering, etc. The volunteers cooperate so well together that they do not even use a formal roster, negotiating it amongst themselves. The passion shown by the community towards the project has led to a partnership being developed between the LAC and the Australian Films Commission, who is now looking to host film festivals at the site.

Leadership of the community is very important, but as with most cultural tourism products, the major driving force often comes from one or two individuals. Volunteers at Barcaldine theatre are often only involved in the project for the short-term and in fact, there have only been two people who have stayed with the project since its inception, including Brett Walsh, President of the LAC. Being an accountant, Mr Walsh had a rather enterprising input into the project, using his expertise to assist in the economic management of the development. His links to the business community also enabled him to raise much needed support and sponsorship for the project. In addition to this, Mr Walsh is capable of physically-running the theatre, having been trained to run the projector, the box office, etc and also contributing personal time to its maintenance.

The Barcaldine theatre project demonstrates how leadership can provide the vision and persistence required for new cultural tourism projects to be met with success.

9.5 Critical mass

Critical mass is a term used to describe the level of assets/organisations/participants that are required to support a new cultural tourism product. Given that all innovations involve some form of risk-taking, there needs to be enough facilities in place to absorb failure if things don't go according to plan. For example, if you are looking to build a cultural tourism theme of cafes – you need to ensure there are plenty of cafes. If there are only three and one drops out, the project cannot sustain itself.

Case study: Skulduggery, TAS

The innovative Skulduggery game developed as part of the Heritage Highway Trail in Tasmania is a great example of how to develop and maintain critical mass. The Skulduggery project was funded by the Sustainable Tourism Cooperative Research Centre and supported by the Heritage Highway Tourism Region Association. Its main aim was to establish a heritage product entirely

different to traditional heritage trails, namely by avoiding the reliance on signage. Creator of Skulduggery, Dr Hamish Maxwell, formulated a trail along the Heritage Highway based on a series of Tasmanian detective stories of the 19th century. The central character is fictitious, however all other elements of the story are based on actual events and characters of the past, and it is up to the participant (the visitor) to put the pieces together and solve the mystery. Clues for the mystery have been strategically placed in various businesses throughout the region – meaning that visitors can only solve the mystery by physically collecting these clues and visiting the crime scenes.

Skulduggery has accumulated a critical mass by encouraging all types of businesses to become involved, rather than just those that are strictly tourism-based. Supermarkets, newsagents and petrol stations are just some examples of the types of local businesses who actively participate in the Skulduggery game. The subsequent effect of this structure is that if one business decides not to participate, there will always be others to cover for it and it isn't nearly as difficult to find a replacement. In order to entice these local businesses to participate, the project placed a high importance on ensuring that Skulduggery would become a tangible commercial product that would stimulate the local economy and create financial returns for the involved businesses. Aside from the fact that the project attracts more visitors to local areas, the project also developed complementary merchandise that visitors can sell, and offered each participating business an advertising/promotion package. Due to this, twenty-two businesses became involved in Skulduggery, and are essentially what the entire project depends on.

Obtaining a critical mass of customers (or visitors) is also critical in establishing a successful cultural tourism product. Skulduggery has done this by appealing to all kinds of visitors, whether they are international back-packers, or people preparing to board the *Spirit of Tasmania*. Furthermore, the game acts as an attraction to the locals themselves, providing them with a fun way to explore their own region. Locals are more likely to take day-trips to towns along areas of the highway and learn about the area's history, simply because the drive incorporates this unique activity.

Skulduggery shows that by establishing and maintaining a strong critical mass, many of the risks associated with new cultural tourism ventures can be reduced.

9.6 Institutional infrastructure

A strong institutional infrastructure, in terms of public and private interaction, is another important component of successful innovation. The success of cultural tourism in Broken Hill can largely be attributed to a strong institutional infrastructure, where both private and public sectors came together to pioneer a strong arts and heritage tourism movement.

Case study: Broken Hill, NSW

Following the decline of the mining industry early in the 21st century, the city of Broken Hill was faced with the enormous challenge of rebuilding both its social and economic climate. The Broken Hill City Council knew it had to move the city in a new direction, and decided that developing and promoting the town's rich heritage and history could be the key to doing this. The council decided to develop Broken Hill into a cultural tourism destination, by developing the city as a 'Living Museum' and providing 'ample opportunity for participation from all areas of community'. To do so, the council pioneered strategic cultural plans,

including the Broken Hill Heritage and Cultural Tourism Program, which brings together local residents, businesses and other government bodies.

Many cultural tourism based ventures made use of this program, and over the years, several community projects have been made possible because of this increased institutional support. One example is the Verandah project, which saw local businesses and residents restore the verandahs of their buildings, in a move to conserve the city's vernacular heritage. Furthermore, because of the council's new emphasis on cultivating local art, community members involved in the local art scene were given the opportunity to develop their products and programmes to a much fuller extent. The collaboration of local arts organisations and the council led to the establishment of exhibition spaces in publicly-funded museums, a regional art gallery for use by local artists, as well as the annual Outback Arts Prize.

The cooperative strategies have been met with a high level of success – Broken Hill was given an Honourable Mention at the 2002 UNESCO Asia Pacific Heritage Awards, it won the Government/Corporate Development Award at the 2004 NSW National Trust Heritage Awards, and was the winner of the Building Regional Communities Award as part of the Year of the Built Environment National Awards in 2004. General Manager of the Broken Hill City Council, James Hall, attributes much of the strategy's success to the joint vision of the city: 'Broken Hill is a fantastic role model across Australia ... It's shown how a city facing serious economic and structural problems can make the most of its unique history, environment and landscape, and forge an exciting new future' (Hall 2004). Clearly, a cultural tourism product is likely to receive much more support if it aligns itself with the overall strategy of the government, so new ventures should aim to build an institutional infrastructure that fuses together the ambitions of both public and private sectors.

9.7 Production and distribution of knowledge

Production and distribution of knowledge is a process that should be occurring throughout the development and monitoring of an innovative product. Undertaking relevant research, and distributing the results or information obtained from it, enhances the knowledge base of all those involved, and enables key players to make important decisions about the project. The development of the Creative Gippsland Cultural Tourism marketing strategy shows how building and sharing knowledge can allow for a much more focused project.

Case study: Creative Gippsland, VIC

Creative Gippsland began with the formation of the Gippsland Local Government Cultural Tourism (GLGCT) Working Party – an organisation consisting of six Gippsland shires. A previous study into the economic and cultural value of the arts industry in the Gippsland area had indicated that most visitors to the region were not aware of the connection between each shire, and the cultural tourism theme was therefore not coming across strongly enough. There was a clear need for the area to work together in formulating a cultural tourism strategy plan for the entire Gippsland Region. Based on this need, the GLGCT successfully applied for grants from the Commonwealth Department of Transport and Regional Services and Arts Victoria, which enabled them to employ a consultant to develop the necessary marketing strategy.

The consultant spent one year directing various forms of research, including:

- A literature review
- Discussions with key authorities such as Tourism Victoria and Arts Victoria
- Visiting all relevant communities and facilitating meetings with key stakeholders within them
- Convening a workshop with the GLGCT working party.

The outcomes of this research formed the basis of a marketing strategy that would unite the cultural tourism aspects of the whole area – the brand image of which became Creative Gippsland. From here, the production of knowledge merely grew, with the new marketing strategy highlighting the need to periodically collect relevant ‘benchmark data.’ Of course, collecting the data is only the first step in this process, and the commendable aspect of the Creative Gippsland project is that it ensures the information it collects does not remain idle. In fact, the marketing strategy includes a communications and linkages section which emphasises the need to ‘share information, resources and expertise between tourism and cultural groups’ (Arts Victoria 2004:3). Furthermore, it also aims to set up a series of familiarisation programs for local government officials to discuss tourism research findings.

Due to the production and expansion of knowledge, the Creative Gippsland project has been able to bring together people involved in cultural activities across the region, leading to a stronger base on which to petition for funding and therefore enhance the area’s overall ability to run cultural tourism attractions.

9.8 Social, cultural and political capital

Social, cultural and political capital is particularly important in regional areas, as they draw much of their tourism activity from the local community. New cultural tourism ventures should aim to draw on the existing social, cultural and political capital of the community while also aiming to build on this capital. Doing so will help to foster a social will for the new project and will ensure that the community is benefited in a socio-cultural fashion. Ballarat’s theme park, Sovereign Hill, is an excellent example of how cultivating social, cultural and political capital can allow for a successful cultural tourism product, in both the short and long term, and greatly increase the product life-cycle.

Case study: Sovereign Hill, VIC

Sovereign Hill was first opened in 1970 and has since become Australia’s most famous outdoor museum, attracting over half a million visitors every year. Amazingly, Sovereign Hill is run by a non-profit community organisation, first instigated in 1960, when locals began to see a need to preserve the city’s heritage. Quite simply, an attraction such as this couldn’t survive without the support from the locals. It was their initial contribution that made the idea a reality, and today, the ever-increasing number of ‘Friends of Sovereign Hill’ volunteers reflects the growing scale of this unique attraction.

9.9 That's a wrap

There is no way to guarantee the success of any innovation. There is always risk involved in change, but there is usually greater risk involved in avoiding it! We cannot provide a definitive checklist whereby compliance equals success.

Instead, we would like to leave you with a short list of thought provokers which might help you target specific strategies and actions in your attempts to manage change and implement new products, services, packages, or ways of marketing your cultural tourism assets. You can use these cues to assess individual ideas, or to assess how well your destination is positioned to take advantage of opportunities that are yet to present themselves.

- Have you thought about what the constraints to innovation might be in your destination?
- What human and organisational resources do you have that allow you to manage comparatively large projects?
- What are the existing cultural assets and initiatives that you can build on in an incremental way – or does your cultural tourism profile require radical innovation?
- What organisations or associations are important in harnessing community energy?
- Who are some key partners outside of your immediate destination – marketing agencies, product distributors, suppliers of capital and skills?
- Are your ideas dependent on the involvement of a small number of businesses, or can the idea survive if individual businesses fail?
- Who is going to lead the project, and what is their motivation for engagement? Will they see it through, and is there a succession plan for key stakeholders?
- Will you be working with or against local government strategies and policies, and are there other government agencies that will become involved?
- What attempts have you made to learn from the experience and knowledge of others in your destination in identifying project opportunities and scoping ideas?
- How will you monitor if the project is working? And how will you make sure stakeholders can both receive this monitoring information and contribute their own experience and knowledge?

10 Additional resources

Know Your Patch: a guide to small area tourism data collections for regional Australia
Published by the Sustainable Tourism Cooperative Research Centre (2005)

Available at www.crctourism.com.au/bookshop

Provides a step-by-step guide to conducting surveys and other forms of local data collection and analysis.

Promoting Awareness of the Value of Tourism: a resource kit

Published by the Centre for Regional Tourism Research (2000)

Available at www.regionaltourism.com.au

Provides additional information on communication strategies (see section 9).

Regional Tourism Cases: innovation in regional tourism

Published by Common Ground (2005)

Available at www.crctourism.com.au/bookshop

Has interesting cases of cultural tourism innovation to support section 10.

The Economics of Tourism Destinations, Norbert Vanhove.

Published by Elsevier (December 2004). Order at www.elsevier.com

Provides more information about collecting and analysing economic data, and understanding economic concepts in tourism.

Special Interest Tourism by Norman Douglas, Ngaire Douglas and Ros Derrett

Published by John Wiley and Sons (2001)

Documents the concepts, approaches, theory and research in cultural tourism.

Decipher – www.decipher.biz contains an ever growing set of references for tourism research and business intelligence. A keyword search on 'cultural tourism' reveals more than fifty publications and statistical data sets. Some of the key ones are:

Arts and Culture in Australia: A Statistical Overview (4172.0) (2004)

Australian Bureau of Statistics

This publication brings together a range of data from both ABS and non-ABS sources about cultural activities and the cultural industries. It presents cultural data on both a topic basis (e.g. participation in cultural activities, employment in cultural industries) and a sector basis (e.g. libraries and archives, performing arts).

Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21st Century (2000)

Australian Heritage Council

This paper reviews recent developments in the theory and methodology involved in the evaluation of cultural heritage. Economists traditionally identify three types of capital: physical capital, human capital and natural capital. Recent suggestions that a fourth type of capital should be recognised, namely cultural capital, are reviewed. Cultural capital is defined as an asset embodying or yielding both economic and cultural value. The paper considers the means

by which these types of value may be assessed and considers the implications of such assessment for investment decisions in heritage projects. The concept of sustainability in the management of cultural capital is also discussed, drawing parallels with the treatment of natural capital in ecological economics.

International Cultural Tourism Charter (1999)
International Council on Monuments and Sites

The international cultural tourism charter bases its objectives on managing tourism at places of heritage significance. This document outlines the six principles of the tourism charter regarding heritage sites.

Host Community: Social and Cultural Issues Concerning Wildlife Tourism (2001)
Sustainable Tourism CRC

This report relates to the disciplinary area of 'the host community', which is one of the three major components (the tourist, the resource, the host) of wildlife tourism. As well as highlighting special issues relating to hosts in the context of wildlife tourism, the report includes an overview of the status and nature of this area, and descriptions of several representative case studies.

Economic Value of Tourism to Places of Cultural Heritage Significance (2000)
Australian Heritage Council

This study reports on the economic value of cultural heritage tourism and the potential for raising such value by the development of a national list of places of cultural heritage significance. The study reports the results of visitor surveys at three Australian heritage mining towns where tourism development has occurred in a variety of ways.

The Use of Cultural Resources as a Catalyst for Regional Tourism Development (June 2000)
Sustainable Tourism CRC

This research examines examples of where visitor experience had been enhanced and heritage assets conserved through the interpretation of in situ heritage, the linking of heritage sites by heritage trails and the adaptive re-use of heritage buildings.

Motivations and Behaviours of Interstate Cultural Tourists (2004)
Tourism Victoria

This factsheet provides the results from a quantitative research study commissioned by Tourism Victoria, examining the motivations and behaviours of interstate visitors who attend cultural attractions, partake in cultural activities, or visit cultural sites. The study involved a sample of 600 interstate domestic cultural tourists from the key markets of Sydney, Brisbane and Adelaide.

Attendance at Selected Cultural Venues and Events, Australia (4114.0) (2002)
Australian Bureau of Statistics

This publication presents results from the 2002 General Social Survey on attendance of people aged 18 years and over at selected cultural venues and events. The data provide details on the basic demographic characteristics of those who attended the surveyed venues and events and their frequency of attendance during a 12 month period.

Developing Cultural Tourism - Impacts of Festivals (March 2004)
Tourism and Travel Institute

This paper reviews literature on cultural tourism and the role of festivals in creating opportunities for community orientated events and festivals which contrast with tourist orientated events which have tenuous links with local communities. Also argues that community based events and festivals provide an opportunity for the celebration of local identity and community empowerment and create tourism for the local area.

Cultural Tourism Dynamic (March 2004)
Tourism and Travel Institute

The traditional approaches to cultural tourism have looked at the issues of supply and demand, largely from the demand side. This has led to constructions of cultural tourism based upon the regimes of cultures consumed by the tourists and packaged by the industry. This paper attempts to unpack the dynamic relationship between the different types of cultures involved in the complex construction of cultural tourism.

The Potential Role of Cultural Tourism on the Gold Coast (2004)
Sustainable Tourism CRC

The purpose of this study was to provide a framework of information with which to inform initial decision making and policy formulation in relation to the development of cultural tourism as an additional tourism product for the Gold Coast. This study aims to explore the potential role of cultural tourism as a means of extending the range of tourism experiences available to visitors to the Gold Coast, while also enhancing the quality of life of the host community.

Tourism Research Report (2004)
Bureau of Tourism Research (Tourism Research Australia)

This report contains six short articles on topical tourism issues including *Culture seekers: impact of cultural visitors in Australia, 1997-98 to 2000-01*.

OTHER SUGGESTIONS:

Successful Tourism at Heritage Places: a guide for tourism operators, heritage managers and communities.
Australian Heritage Commission, Department of Resources, Energy and Tourism and CRC for Sustainable Tourism, 2001.

REFERENCES:

1. Commonwealth Department of Resources, Energy and Tourism, 'Tourism Impact Model'. Information available at <http://www.ret.gov.au>
2. Lyn Leader-Elliott 1996, 'Cultural Tourism'. Available at: <http://ehlt.flinders.edu.au/culturaltourism/faq/index.php>
3. Carlsen, J. and Wood, D. (2004). *Assessment of the Economic Value of Recreation and Tourism in Western Australia's National Parks, Marine Parks and Forests*. Gold Coast: Sustainable Tourism Cooperative Research Centre (available online at www.crctourism.com.au/bookshop).

CONTACTS

This publication is available online at www.culturaldata.gov.au.
© Commonwealth of Australia 2008

Statistics Working Group
Department of the Environment, Water, Heritage and the Arts
GPO Box 787, Canberra City, ACT 2601

