This article was downloaded by: *[James Cook University]*
On: *18 February 2010*
Access details: *Access Details: [subscription number 907464872]*
Publisher *Routledge*
Informa Ltd Registered in England and Wales Registered Number: 1072954 Registered office: Mortimer House, 37-41 Mortimer Street, London W1T 3JH, UK

An exploratory analysis of planning characteristics in Australian visitor attractions

Pierre J. Benckendorff [a]

[a] James Cook University, Australia

PLEASE SCROLL DOWN FOR ARTICLE

An Exploratory Analysis of Planning Characteristics in Australian Visitor Attractions

Pierre J. Benckendorff
James Cook University, Australia

This paper provides an exploratory analysis of the planning practices of 408 Australian attraction operators. The results indicate that attraction managers can be divided into four categories: those that do not engage in any formal planning, those that adopt a short-term planning approach, those that develop long-term plans, and those that use both short-term and long-term planning approaches. An evaluation of the sophistication of attraction planning showed a bipolar distribution. Attraction managers favored a planning horizon of three or five years, and were inclined to involve their employees in the planning process. Managers relied strongly on their own research and tourism industry intelligence when formulating business plans. The content of plans tended to focus on operational activities, financial planning and marketing. The study provides a benchmark for the comparison of attraction planning efforts in various contexts.

Key words: attractions, strategy, planning, benchmarking, Australia

Introduction

By all accounts, the future of tourism in the Asia-Pacific appears optimistic. The World Tourism Organization (1999, 2002) predicts that international visitor arrivals will increase from 131 million in 2002 to 397 million in 2020. While this growth is invigorating many Asian economies, authorities and private enterprise will need to invest in tourism infrastructure and human resources on an unprecedented scale. The construction and management of tourist facilities, including visitor attractions, will need to be carefully orchestrated in order to meet the seemingly insatiable demand of travelers in a sustainable manner. This study examines the planning approaches of tourist attraction managers in Australia. While the findings have universal application, Australia's location within the Asia-Pacific region, and its position as a major destination for Asian travelers, offers added relevance to practitioners and researchers in this region.

Gunn (1988) describes attractions as the "first power", "lodestones for pleasure" and the "real energizer" of tourism in a destination. According to Gunn (1994) visitor attractions serve two key functions in tourism: they *stimulate interest* in travel to a destination and

they provide *visitor satisfaction*. At a more holistic level, attractions play an increasingly vital role in triggering opportunities for regional employment and economic growth (Johnson & Thomas, 1991). Milman (2001) expects that the popularity of attractions will continue to grow as the sector diversifies into on-site accommodation, food services, recreational shopping, entertainment activities and other tourist services.

While visitor attractions are frequently described as the key components of a destination's tourism industry, they continue to be poorly understood, with research lacking in conceptual sophistication and depth (Leiper, 1990; Lew, 1994; Richards, 2002). The need to study visitor attractions has been discussed by numerous authors (Gunn, 1994; Leiper, 1990; Lew, 1994; Pearce, 1991). In comparison to other sectors of the tourism industry, visitor attraction research is in its early stages (Sun & Uysal, 1994). Lew (1994, p. 292) highlights that "tourism researchers and theorists have yet to fully come to terms with the nature of attractions as a phenomena" while Pearce (1998/1999) indicates that attractions deserve a multidisciplinary research effort.

The focus of visitor attraction research can be summarized by a number of broad themes. The first area of research emphasis has focused on defining and classifying visitor attractions and understanding the components that comprise an attraction (Leiper, 1990; Leiper, 1997; Lew, 1994; Pearce, 1991; Richards, 2002). A second theme in visitor attractions research has explored the issue of managing visitors in a range of settings (Garrod, Fyall & Leask, 2002; Moscardo, 1999; Moscardo & Woods, 1998; Pearce, 1989). A third area of research has focused on visitor attractions themselves by exploring their characteristics, perceptions and reactions

to components of attractions (Boekstein, Bennet & Uken, 1991; Davies & Prentice, 1995; Fodness, 1990; Jago & Shaw, 1997; McClung, 1991; Moutinho, 1988). A final, less prominent aspect of visitor attraction research has examined attraction employees by describing the human resource aspects of attractions (Deery, Jago & Shaw, 1997; Johnson & Thomas, 1991; Law, Pearce & Woods, 1995). It can be noted that these broad themes of visitor attraction research derive from the combined contributions of researchers in the United States, the United Kingdom and Australia.

Tourism research has given very little attention to examining the organizational characteristics of visitor attractions. Exceptions include Braun & Soskin (1999), who provided a brief analysis of pricing strategies in Florida theme parks; and Dimmock (1999) who examined the management style and competitive strategies among tourism firms in New South Wales, Australia. Milman's (2001) exploratory analysis of attraction managers' perceptions of the future also offers some insights into organizational change within the sector, albeit from a North American perspective. In the context of this study, Henderson (1999) found that there was an absence of planning, and specifically crisis planning, in the attraction sector in Singapore. She proposed that the absence of plans "might be partly explained by the fact that the attraction business is comparatively new to Singapore and has a short history; those involved have only had a limited amount of experience to draw on" (Henderson, 1999, p. 180).

Strategic Planning

Cummings (1993) claims that the term "strategy" is derived from the Athenian *strategos*

which was associated with the leadership and command of military units. The term apparently emerged in response to the increasing complexity of military decision-making. In a modern context, strategic planning is in essence a process of establishing the purpose and future direction of an organization (Soteriou & Roberts, 1998). Numerous definitions of strategic planning are available in the management literature but consensus on the exact meaning has not been achieved. Table 1 displays some contemporary strategic planning definitions.

Three common themes can be extrapolated from these definitions. First, strategic management is a process consisting of a set of managerial decisions and actions. Second, it is concerned with matching organizational

Table 1   Contemporary Definitions of Strategic Planning

Source	Definition
Chon & Olsen, 1990	Strategic management is a process of examining both present and future environments, formulating the organization's objectives, and making, implementing and controlling decisions focused on achieving these objectives in the present and future environments
Waalewijn & Segaar, 1993	Strategy is defined as an integrated set of actions geared towards the long-term continuity and strength of any organization, both in absolute terms as well as relative to their competitors. Strategic management is the coming together of planning, decisions, actions and strategic thinking. Strategic planning is one of the key supports in building a strategy and in making it explicit.
Bryson, 1995	Strategic management is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is and what it does
Wheelen & Hunger, 1998	Strategic management is that set of managerial decisions and actions that determines the long-run performance of a corporation. It includes environmental scanning, strategy formulation, strategy implementation, and evaluation and control.
Pearce & Robinson, 2005	Strategic management is defined as the set of decisions and actions that result in the formulation and implementation of plans designed to achieve a company's objectives.
David, 2004	Strategic management can be defined as the art and science of formulating, implementing, and evaluating cross-functional decisions that enable an organization to achieve its objectives.
Kotler, Brown, Adam, & Armstrong, 2001	Strategic planning is the process of developing and maintaining a strategic fit between the organization's goals and capabilities and its changing marketing opportunities.

objectives and resources with environmental opportunities. Finally, strategic planning deals with the long-term or future performance of the organization.

Numerous models have been suggested by strategic planning proponents and researchers. Most of these models present the strategic planning process as a flow chart (Mintzberg, 1990) or series of rational steps (Wheelen & Hunger, 1998). Some models view strategic planning as a matrix of interrelated parts (Patterson, 1986). Gilbert & Kapur (1990) present strategic planning as a dynamic, cyclical process with interactions between various stages of the cycle. Irrespective of the process, a number of strategic planning tasks can be synthesized from these models and are summarized in Figure 1.

It is evident from these models and planning actions that the strategic planning process is continuous. It is not simply a means of formulating a plan for a defined period, but an ongoing cycle of strategy formulation, implementation and evaluation. In realit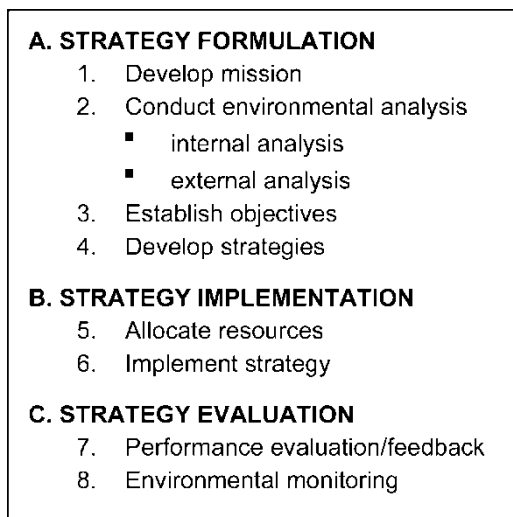y, it has been suggested that strategic planning does not follow a highly rational path but involves a series of incremental decisions and processes (Milliken, 1987; Quinn, 1980). Within this framework, there is also recognition of long-term and short-term goals. Long-term planning strategies (i.e five to ten years) act as an umbrella under which shorter term operational strategies (i.e. one year) can be formulated.

Models which describe strategic planning provide a number of opportunities for investigating the current and emerging directions of visitor attractions (Pearce, 1998/1999). Unfortunately, strategic planning research in the attraction sector and in the tourism industry as a whole can at best be described as meagre (Athiyaman, 1995; Chon & Olsen, 1990; Soteriou & Roberts, 1998). While a few studies have investigated the need for planning at the macro, or destination level (Faulkner, 1994), very little research has occurred at the micro, or organizational level. Planning studies in tourism have also tended to focus on developing products rather than existing products.

Gilbert & Kapur (1990) observed that strategic planning is rarely discussed in journals applied to the tourism industry. Some recent exceptions to this general observation are summarized in Table 2. The table indicates that the small number of planning-related studies are diverse, both in terms of sample and study focus. The subject has received some attention in the broader tourism and hospitality literature (e.g. Evans, Campbell & Stonehouse, 2003; Hall, 2000; Moutinho, 2000; Olsen, West & Tse (1998); Poon, 1993; Teare & Boer, 1991; Tribe, 1997).

Gilbert & Kapur (1990) stated that it was unclear whether tourism companies were managed strategically and whether a formalized process of developing, implementing and evaluating strategy was commonly practised.

A. STRATEGY FORMULATION

1. Develop mission
2. Conduct environmental analysis
   - internal analysis
   - external analysis
3. Establish objectives
4. Develop strategies

B. STRATEGY IMPLEMENTATION

5. Allocate resources
6. Implement strategy

C. STRATEGY EVALUATION

7. Performance evaluation/feedback
8. Environmental monitoring

Figure 1   Common strategic planning tasks.

Table 2 Business Planning-related Studies in the Tourism and Hospitality Literature

Year	Authors	Study Focus	Instrument	Sample Description	Sample Size (Response Rate)
1990	Gilbert & Kapur	Strategic marketing planning in the hotel industry	In-depth interviews	Hotel groups/chains, United Kingdom	4
1995	Athiyaman & Robertson	Strategic planning in large tourism firms	Mail Questionnaire	Large tourism and manufacturing firms, Australia	87 (51%)
1995	Jurowski & Olsen	Environmental scanning in tourist attractions	Content Analysis	"Trends Database" developed from key industry journals, 1989–1992	–
1998	Phillips & Appiah-Adu	Benchmarking and strategic planning in hotels	Mail Questionnaire	Hotel Groups, UK	63 (84%)
2000	Phillips & Moutinho	Measuring strategic planning effectiveness	Mail Questionnaire	Top 50 Hotel Groups, United Kingdom	100 (77%)
2003	Kemp & Dwyer	Mission statements of international airlines	Content analysis of airline websites	International airlines	50

These sentiments were echoed by Athiyaman (1995) who observed that gaps existed in almost all areas of strategy research in the tourism industry. More subtly perhaps, the tourism literature is not rich in strategic planning research, but many companies and institutions in tourism, such as hotel groups and airlines, may have confidential and substantial strategic planning documentation.

Strategic planning can benefit visitor attractions by allowing operators to make better management decisions based on sound knowledge of future developments (Chon & Olsen, 1990). While the success of a tourism organization clearly depends on the development of strategic competitive advantages, strategic planning, where evident, has only been applied in a partial sense (Dimmock, 1999; Faulkner, 1994). Early research by Rovelstad & Blazer (1983) indicated that tourism businesses lagged behind manufacturing firms in strategic planning and research. In contrast, later research by Athiyaman & Robertson (1995) found that the strategic planning processes adopted by large Australian tourism firms were of equal sophistication to those employed by manufacturing firms. This line of inquiry clearly requires further exploration.

Strategic Planning in Small Firms

One explanation for the lack of attraction planning research in the tourism literature may well be due to the scale or size of tourism businesses studied by researchers. Strategic planning research has traditionally focused on large corporations, and the models, prescriptions and constructs observed may not be relevant to smaller firms such as those commonly found in the attraction sector. In fact, Jennings & Beaver (1997) state that the management process in small firms is unique and bears little or no resemblance to management processes found in larger organizations. Robinson & Pearce (1984) point out that literature in small-business planning suffers form the "little big business" syndrome which results from applying concepts related to large firms to small business applications.

Robinson & Pearce (1984) described planning in small firms as unstructured, irregular and uncomprehensive. The planning process in firms has also been characterized as incremental, sporadic and reactive, and objectives have been described as "vague or inadequately defined, and generally pragmatic and short-range" (Sexton & Van Auken, 1985, p. 7). Robinson & Pearce (1984, p. 129) also noted that: "Although small firm managers engaged in strategic thinking, such deliberation was seldom formalised, never communicated beyond a very few personal contacts, and the search for alternatives was typically passive and characterised by the acceptance of the first attractive option."

Planning in larger firms focuses on the evaluation of the environment, the formulation strategies to meet objectives, the implementation of policies and programs, and the feedback of information to indicate success according to predetermined goals. Most managers of small firms, such as visitor attractions, cannot afford the luxury of a specialized environmental scanning staff. Small firms are concerned with manipulating a limited amount of resources in order to gain the maximum immediate and short-term advantage. In small firms, efforts are not concentrated on predicting future opportunities and threats but on adapting as quickly as possible to current threats and changes in the environment (Jennings & Beaver, 1997).

The Study

A review of the management literature reveals a variety of rigorous studies examining strategic planning activities in organizations. With the exception of banks and airlines, these studies have generally tended to focus on manufacturing and retail firms rather than service firms. Several authors in the management literature have recognized the need for industry-specific research in strategic planning. Such research would account for factors that vary across industries.

It is unclear whether the planning processes developed in the traditional planning literature are widely applicable to the attraction sector or whether a less formal approach is needed. Despite the obvious observation that attractions need to be managed, there has been little attempt to integrate managerial considerations into visitor attraction frameworks. Limited research has been carried out to identify the managerial and organizational characteristics of visitor attractions.

Mintzberg (1990) suggests that strategic planning research can be divided into three dimensions:

1. *Strategy process*: focuses on the strategic decision processes and factors that impact on the formulation of strategies;
2. *Strategy content*: focuses on the characteristics of the output or content of strategies; and
3. *Strategy context*: focuses on the unique characteristics that distinguish one organization or industry from another and that may impact on the outcome of strategies.

This study focuses on the first two dimensions by examining the planning *process* and *content* characteristics of Australian visitor attractions. While the third dimension is equally important, an exploration of strategy context warrants a separate, more detailed study. The purpose of this study is to conduct an exploratory analysis of the nature of planning in the Australian attraction sector. This can be further delineated into the following aims:

1. To determine whether visitor attractions engage in short-term and long-term planning.
2. To explore reasons for planning, or lack of planning in visitor attractions.
3. To investigate the content and planning processes used by attraction managers.

Methodology

A self-administered mail questionnaire was used to collect information about individual attractions. The questionnaire was adapted from a range of well-developed instruments used in the broader strategic management literature, and a pilot study was therefore not deemed to be necessary. The questionnaire was addressed to the general manager of the attraction. A return address was added to the back of each envelope so that undelivered questionnaires could be eliminated from the study. Pre-paid postage envelopes were also included with all questionnaires to facilitate ease of return.

An adaptation of Dillman's (1978) Total Design Method was used in an attempt to maximize the response rate. This technique involves the use of follow-up postcards to remind managers to complete the questionnaire. One follow-up mailing of postcards was initiated to act as a reminder and to encourage further response.

The research focused on Australian visitor attractions in operation between April 2000

and July 2000. No limitations were imposed on the size of attractions. The sample was selected on a non-random, convenience basis. Databases of visitor attraction contact details for each Australian state and territory were obtained from various sources. The complete database resulted in over 2,000 attractions.

The types of organizations qualifying as attractions were strictly controlled for this study. The complete database was subjected to a filtering process to eliminate attractions that were inappropriate for the study. This filtering process was necessary because individual sources varied in detail and classification of attractions. The types of attractions that were removed from the database included:

- *Non-managed attractions and landscape features* (such as lookouts, parks, gardens, lighthouses and picnic grounds). It was highly unlikely that responses would be received from these attractions.
- *National Parks*. National parks are managed by a central administration in each state and it was felt that their organizational structure and responses would introduce statistical irregularities.
- *Craft shops*, *souvenir stores*, *tearooms and retail outlets* (including retail galleries). These operations were, by definition, not considered to be attractions.
- *Markets and festivals*. The temporary and sporadic nature of markets and festivals excluded these attractions from the study.
- *Wineries*. After careful deliberation, wineries were excluded from the sample as they were viewed as not being representative of most attractions. It was felt that the large number of wineries in the original database would have introduced highly irregular results.

A total of 1,665 questionnaires was sent by standard mail in April 2000. At the conclusion of the study in July 2000, 430 responses had been received. Of these, 23 were deemed to be invalid. Questionnaires were deemed to be invalid if they were returned by establishments that were excluded from the study. A further 55 (3.3 percent) questionnaires were returned undelivered, indicating that 1,610 questionnaires reached their destination. This was a good indication that the database was largely accurate. The response rate for the questionnaires that were delivered was 26.7 percent. This was within the expected response range of 20 percent to 30 percent. Although the response rate is reasonable for a sample of this size, a limitation associated with this approach is the risk of non-response bias. Unfortunately, it was not feasible to test for differences between respondents and non-respondents due to limited resources.

Profile of Responses

Attraction attendance is a key measure of the size and performance of a visitor attraction. The study sample consisted of a mix of small and large attractions. Over 75 percent of attractions received fewer than 50,000 visitors per annum, while almost 25 percent received less than 5,000 visitors. The results suggest that most attractions are relatively small. The mean number of visitors for all attractions was 38,596 (s.d. = 59,061), while the median was 15,000. As expected, the sample was skewed (2.56) toward smaller attractions. The smallest attraction received only 290 visitors per year while the largest received 346,453 visitors.

A large number of attractions (49.6 percent) responding to the questionnaire were museums. Table 3 provides a more detailed

Table 3   Comparison of Responses by Attraction Category

Attraction Category	Example	N	%
Museums	Powerhouse Museum, New South Wales	186	49.6
Australian culture/history	Sovereign Hill, Victorias	140	37.3
Galleries	New South Wales Art Gallery	48	12.8
Farming	Hillwood Strawberry Farm, Tasmania	47	12.5
Nature-based attractions	Undara Experience, Queensland	45	12.0
Specialist attractions	The Edge Cinema, New South Wales	43	11.2
Wildlife parks/aquaria	Sydney Aquarium, New South Wales	40	10.7
Gardens	Australian National Botanic Gardens	37	9.9
Theme parks	Aussie World, Queensland	31	8.3
National Trust	Old Melbourne Goal, Victoria	28	7.5
Action/adventure	Greenhills Adventure Park, Victoria	24	6.4
Factory/manufacturing	Ginger Factory, Queensland	20	5.3
Military	Army Tank Museum, Victoria	17	4.5
Interpretive/information	Discovery Centre, Queensland	12	3.1
Other	Walhalla Goldfields Railway, Victoria	20	5.2

*Multiple Response Format.

breakdown of responses. The categories presented are not mutually exclusive. Attraction managers were able to select any number of categories that best described their attraction. Consequently many museums may have selected both *Museum* and *Australian Culture and History*. This approach recognizes that many attractions are diversifying to provide tourists with a compelling mix of entertainment and education and thus cannot be restricted to a single category.

While the number of museums appears to be disproportionate to other types of attractions, anecdotal evidence supports the findings. It is not uncommon to find small museums administered by historical societies in many Australian towns. Many typical small Australian towns often boast a museum as their only attraction. In comparison, a Tourism New South Wales (1999) study of 100 attractions found that museums and historical sites (18 percent) were the second most common category after nature-based attractions (27 percent). Nonetheless, the number of museums in the sample would suggest that some caution is needed when comparing the results with countries where these types of attractions are not dominant. Examples of larger museums and Australian culture and heritage attractions included in the study include the Powerhouse Museum in Sydney and Sovereign Hill in Ballarat, Victoria. Table 3 also indicates that many larger regional centers also support art galleries (12.8 percent), often managed by a local society or shire council (e.g. Gippsland Art Gallery and Gladstone Regional Art Gallery). This compares with 16 percent for the Tourism New South Wales study.

Planners and Non-Planners

The following discussion examines planning characteristics from the perspectives of the planning process and plan content. The process characteristics that are examined include the planning period, planning responsibility, plan availability, sources of information and planning assistance. The content elements consist of the strategies and environmental forces detailed in visitor attraction plans. Other characteristics, such as planning sophistication, reasons for long-term planning and reasons for not planning are also examined.

Attractions managers were asked to indicate whether they engaged in short-term planning of less than 12 months (i.e. operational planning) and long-term planning of one year or more (i.e. strategic planning). The study identified that 263 (64.5 percent) attractions engaged in short-term planning while 221 (54.2 percent) engaged in long-term planning (Table 4). It was encouraging to find that more than half of the attractions examined were actively involved in considering and planning for the future and that 42.9 percent of attractions were conducting both short-term and long-term planning.

Reasons for Planning

Central to examining the planning practices of visitor attractions, is an understanding of why attractions engage in long-term planning activities. Managers were asked to select the reasons for planning from a list of 15 items derived from previous studies (Kargar, 1996; Orpen, 1985; Ramanujam & Venkatraman, 1987; Wilson, 1994).

The desire to gain an understanding of the attraction's future seems to be a key motivator with 84.0 percent of long-term planners indicating that planning provides a clearer sense of vision. A common side-effect of planning is that the process of assessment and strategy formulation often results in new ideas that may not otherwise have surfaced (Powell, 1992). Stimulating new ideas was cited by 83.5 percent of managers as the second most common reason for planning. The intrinsic role of long-term planning as a tool for improving the long-term performance of attractions ensured that this reason was rated third by 82.0 percent of managers.

Interestingly, the improvement of an attraction's competitive position was only cited by 38.4 percent of attraction managers as a reason for planning. This would suggest that 61.6% of managers do not view long-term

Table 4   Planning Focus in Australian Visitor Attractions

	No Short-Term Planning		Short-Term Planning		Total	
	N	%	N	%	N	%
No long-term planning	99	24.2	88	21.6	187	45.8
Long-term planning	46	11.3	175	42.9	221	54.2
Total	145	35.5	263	64.5	408	100

Table 5   Reasons for Developing a Long-term Plan

Reasons for Planning	N	%
Provides a clearer sense of "vision"	173	84.0
Stimulates new ideas	170	82.5
Improves long-term performance	169	82.0
Allows us to identify key problem areas	159	77.2
Allows us to explore alternatives	139	67.5
Leads to efficient resource allocation	121	58.7
Improves short-term performance?	112	54.4
Helps to predict future trends	110	53.4
Reduces feeling of uncertainty	95	46.1
Facilitates faster decision-making	89	43.2
Increases employee commitment	88	42.7
Improves our competitive position	79	38.3
Reduces our vulnerability to surprises	71	34.5
Creates greater flexibility	69	33.5
Strengthens managerial control	61	29.6

*Multiple Response Format.

planning as a tool for outperforming competitors.

These findings support comments by some authors (Orpen, 1985; Powell, 1992; Shrader, Mulford & Blackburn, 1989) that while planning may not impact on performance, it is seen to have other benefits for an organisation.

Reasons for not Planning

Just as important as the reasons for planning, are the reasons why non-planners do not plan (see Table 6). The most common reason for not planning was: "lack of time for planning" (39.9 percent). This reinforces the view by Robinson & Pearce (1984) that managers have difficulties in allocating time for planning activities in the face of ongoing day-to-day

problems. The second most commonly cited reason for not planning was that "the attraction is too small" (36.2 percent). This reinforces the enduring belief that planning is an activity that is only appropriate for larger organizations.

The third most common reason was shared between "planning is not appropriate for the attraction" (30.4 percent), and a lack of skills for planning (30.4 percent). Once again, this finding supports Robinson & Pearce (1984). 25.4 percent of attractions also had the perception that planning was too expensive. This is often not the case, as attraction managers have access to government resources and assistance at little or no cost. Shrader et al. (1989) also found that perceived cost can be a barrier to planning. However, the findings do not support a suggestion by Shrader et al. that an unpredictable

Table 6   Reasons for Not Developing a Long-term Plan

Reasons for not Planning	N	%
Lack of time for planning	55	39.9
The attraction is too small	50	36.2
We don't have the skills or expertise for planning	42	30.4
Planning is not appropriate for the attraction	42	30.4
The boss has a mental plan or "mud map"	41	29.7
Too expensive to do properly	35	25.4
Too difficult to co-ordinate the planning process	22	15.9
Too difficult to obtain trustworthy data	16	11.6
The business environment is too unpredictable	13	9.4
The attraction is a volunteer organization	11	8.0
Currently under development	8	5.8
Lack of commitment from employees	7	5.1
The future is uncertain	5	3.6
The attraction is being sold	2	1.4
Other reasons	31	22.5

*Multiple Response Format.

business environment is a major impediment to planning.

The Planning Process

The planning process is concerned with the strategic decision processes and factors that impact on the formulation of strategies. The planning process in Australian visitor attractions was examined by exploring the planning horizon, the delegation of planning responsibility, the availability of planning documents, the information sources used during the planning process and the assistance provided by external entities. A summary of the planning process characteristics for attractions engaged in long-term planning is provided in Table 7.

The median long-term planning period was five years, with the mean being 4.9 years (s.d. = 4.2). The minimum planning period for a long-term plan was one year and maximum was 50 years. The results reflect the common practice of developing long-term plans of either three or five years as part of the strategic planning process.

Research by Shrader *et al.* (1989) indicated that top managers tended to complete planning tasks without the assistance of employees. Kargar (1996) suggests that the involvement of key personnel in the planning process is an important contributor to planning effectiveness in small firms. Such involvement builds a planning climate and planning culture. Some authors maintain that the support, skills and knowledge of an organization's employees are the most important resource for planning (Marsden, 1998; Rhodes, 1988). Peters & Waterman (1982) have also recognized the importance of empowering and involving employees in the planning process.

Table 7 Planning Process Characteristics for Attractions Engaged in Long-Term Planning

Planning Process Characteristics	N	%
Planning horizon		
1 year	5	2.4
2 years	15	7.1
3 years	63	29.7
4 years	5	2.4
5 years	102	48.1
6 years	2	0.9
7 years	1	0.5
10 years	15	7.1
More than 10 years	4	1.9
Planning involvement		
All employees	87	39.9
Manager	86	39.4
Planning unit	45	20.6
Planning availability*		
Management	197	89.5
Employees	151	68.3
Stakeholders	72	33.6
General public	55	24.9
Information sources*		
Own research	175	82.5
Industry intelligence	156	73.6
Competition	144	67.9
Mass media	128	60.4
Government	107	50.5
Educational institutions	65	30.7
Consultants	57	26.9
Internet	8	3.8
Customers	5	2.4
Museum authorities	4	1.9
Other	3	1.4
Planning assistance		
Consultancy firms	58	26.8
Marketing firms	31	14.2
Accountants	23	10.6
Educational institutions	22	10.1
Lawyers	4	1.8
Other	14	6.4

*Multiple Response Format.

Attraction managers were asked to indicate who was responsible for long-term planning efforts within the organization. The findings indicate that 39.9 percent of operators delegate planning to all employees. A further 39.5 percent of planning is undertaken solely by managers, while 20.6 percent have a planning unit that is responsible for planning.

Attraction operators were asked about the availability of their business plan to determine whether it was being used solely by management or by other individuals who have an interest in the attraction. Of the 221 operators that engaged in long-term planning, 197 (89.1 percent) made their planning document available to managers. Business plans were available to employees at 151 attractions (68.3 percent); to other stakeholders at 72 attractions (33.6 percent); and to the general public at 55 attractions (24.9 percent). 10.9 percent of attractions did not select any categories, indicating that they either did not make their plans available or that they declined to answer the question.

The sources used by managers to obtain information for the strategic planning process plays an important role. Research investigating the information needs of British visitor attractions found that operators were looking for a range of data, including visitor trends and characteristics, visitor spending, promotional budgets and effectiveness, staffing levels and costs and the profitability of different activities (Martin & Mason, 1990). However, research in the strategic planning literature has found that managers value informal personal information more than formal impersonal information. In their analysis of environmental scanning in small firms, Smeltzer, Fann & Nikolaisen (1988) found that managers tend not to consider traditional sources of business information or advice from outsiders as being particularly valuable and appear to seek social and psychological support rather than objective information.

Smeltzer et al. (1988) also found that managers tended to focus on information about the marketplace and ignored competitors as an important source of information. Brouthers, Andriessen & Nicolaes (1998) found that small-firm managers used non-quantitative analytical techniques and relied in their intuition when gathering information about the environment. The sources of information used by managers during the planning process were assessed. The results presented in Table 7 highlight the importance of primary research, with 82.5 percent of attractions undertaking their own research for planning purposes. Primary research undertaken by the attraction operator has the benefit of being relatively cost-effective and provides the manager with a greater degree of control and customization.

There was also heavy reliance on tourism industry intelligence. Interestingly, competitor information, such as annual reports and promotional material was used by 67.9 percent of attractions. This appears at odds with the findings for plan content (presented below), which indicate that many attractions do not include competitor trends in their business plan. Many attraction managers are using information from competitors as a consideration in the planning process, but are not identifying competitor trends in their business plans.

Educational institutions (30.7 percent) and consultants (26.9 percent) were the least common sources of information during the planning process. Information sources such as industry intelligence, competition, mass media and government information are freely available. Information from education institutions and consultants is more difficult to access and in the case of consultants, information may be too costly for smaller attractions.

The mode for the number of information sources selected was three, indicating that attractions commonly use this number of information sources when searching for information about competitors, customers and the general environment.

It must be appreciated that due to their size, small firms are often unable to afford the strategic planning staff and personnel that larger firms possess. Robinson (1982) undertook a study which sought to address the perceived shortcomings of small-business planners by investigating the impact that "outsiders" such as consultants, lawyers, accountants, bankers and boards of directors had on the performance outcomes of strategic planning. Robinson found that outside planners contributed significantly to improvements in small-business profitability, sales growth, employment and productivity. It was suggested that outsiders are important for three reasons: they compensate for a lack of full-time planning staff; they improve the quality of decision-making and the likelihood of continued, systematic planning; and they make up for a lack of formal planning skills.

The level of outside assistance in the planning process can impact on the outcome of planning strategies and the quality of the business plan. It is therefore pertinent to assess whether assistance was received during the planning process, as well as the source of any assistance. The results indicated that 98 attractions (45.0 percent) received outside assistance during the planning process, while seven managers (3.2 percent) indicated that they were not sure whether they received assistance.

Table 7 indicates that consultants were by far the most common source of assistance. Unlike some of the other entities shown in the table, consultants have the capability to assist with every aspect of the planning process. A relevant example is the Undara Experience,

a nature-based attraction centered on a series of underground lava tubes in outback Queensland. Consultants are involved in the development of this attraction's strategic plans, as well as the ongoing monitoring of various key performance indicators. The reliance on consultants suggests that some attraction managers have found a way to compensate for a general lack of planning expertise. The "other" category included a variety of sources, including government assistance, small-business development units and museum agencies.

Plan Content

A cursory assessment of plan content was conducted by questioning operators about the strategies and environmental forces detailed in their plans. Table 8 provides a summary of the strategic focus and environmental forces considered by managers in their planning documents.

Strategic Focus

Strategy content options included operational strategies, budgets and financial strategies, sales and marketing strategies, research and product development strategies, and human resource strategies. As Table 8 indicates, operational strategies featured prominently in 86.6 percent of business plans. This indicates a focus on the day-to-day operations of the attraction. Financial and marketing strategies were also prominent in attraction business plans. A disturbing aspect is the fact that just over half (56.2 percent) of attractions included human resources strategies in their business plans. It was expected that human resource strategies would rate more highly to counter the prevalence of high turnover in the tourism industry.

Table 8 Planning Content Characteristics for Attractions Engaged in Long-Term Planning

Planning Content Characteristics	N	%
Strategic focus		
Operational activities	188	86.6
Budgets and financial	180	83.0
Sales and marketing	179	82.5
Research and product development	127	58.5
Human resources	122	56.2
Consideration of environmental forces		
Market forces	160	77.3
Social and cultural forces	158	76.3
Economic and political forces	117	56.5
Technological forces	89	43.0
Competitor trends	76	36.7

*Multiple Response Format.

The results are consistent with findings by Check-Teck, Grinyer & McKiernan (1992) in their study of strategic planning in the ASEAN region. They reported that marketing, financial and operational aspects were most commonly covered in written strategic plans while product development and personnel were of less interest. The findings also generally support and earlier study by Orpen (1985). These comparisons indicate that the lack of strategies relating to product development and human resources are not unique to the tourism industry or attractions. The mode for the number of strategy content options selected was five, suggesting that attractions most commonly include all items in their long-term plan.

Consideration of Environmental Forces

An assessment of environmental forces and their impact on the attraction commonly feature in the business plan (David, 2004). The questionnaire assessed the presence of five distinct environmental forces: market trends, social and cultural trends, economic and political trends, technological trends and competitor trends. Market trends and social/cultural trends both rated highly and were included in 77.3 percent and 76.3 percent of plans respectively. Technological and competitor trends were included in comparatively few plans. It is unfortunate that 57.0 percent of Australian attractions are not assessing the opportunities offered by new advances in technology. Furthermore, it was somewhat surprising that 63.3 percent of attractions did not examine competitor trends in their business plans. The mode for the number of environmental forces selected by attractions was two, suggesting that there is scope to optimize long-term plans by considering the impact of additional environmental forces.

Planning Sophistication

Planning sophistication was measured by investigating the planning actions undertaken by attractions during the planning process. These actions were adapted from items used by Matthews & Scott (1995), Powell (1992) and Lindsay & Rue (1980). The results are summarised in Table 9.

The results indicate that most attraction managers establish a mission or vision and a set of long- and short-term goals as part of the long-term planning process. It was interesting to note that less than half (48.9 percent) of all long-term attraction planners stated that management actions were based on formal plans rather than on intuition. It could be inferred that 51.1 percent of managers are guided by intuition rather than their business plan when undertaking management tasks.

Planning activities were further investigated by developing a scale of planning sophistication based on the responses provided by managers. The scale was developed by assigning one point to an attraction for each planning action that was selected in Table 9. The assumption is that attraction managers who undertake a greater number of the planning activities listed are more sophisticated in their planning approach. Managers who undertook short-term planning were also assigned one point. A score of nil was assigned to those attractions that did not have a short- or long-term plan. This resulted in a 12-point scale of planning sophistication. The findings are presented in Table 10.

While a large number of attractions are grouped towards the lower part of the scale, the findings do suggest a bipolar distribution.

Table 9   Execution of Specific Planning Activities by Attraction Managers.

Planning Action	N	%
The attraction has a mission and/or vision	214	96.8
Long-term goals & objectives (more than one year) have been established for the attraction	211	95.5
Short-term goals & objectives (one year or less) have been established for the attraction	199	90.0
We hold regular meetings to discuss strategies	174	78.7
Procedures for assessing the attraction's strengths & weaknesses have been established	159	72.0
We search frequently for information about our markets and customers	146	66.0
Our planning outlook is more long-term than short-term	140	63.4
We search systematically for new products, acquisitions and investments	117	52.9
Management actions are based more on formal plans than on intuition	108	48.9
We search frequently for information about our competitors	100	45.3
We use computer software as planning aids	97	43.9

*Multiple Response Format.

Table 10   Planning Sophistication Scale for Australian Visitor Attractions

Planning Sophistication	N	%
0	98	24.2
1	89	21.9
2	2	0.5
3	4	1
4	6	1.5
5	10	2.5
6	20	5
7	28	7
8	43	10.5
9	31	7.5
10	42	10.2
11	14	3.5
12	19	4.7
Total	407	100

0 = low sophistication; 12 = high sophistication.

The median level of planning sophistication for all attractions taking part in the study was 5 ($\bar{x} = 4.72$). While the percentage of attractions at level five is quite small, the median is heavily influenced by the large percentage (24.2 percent) of attractions that did not have a short- or long-term plan. Attractions that did undertake planning (ie: a sophistication score of 1 to 12), had a combined median score of 7 ($\bar{x} = 6.22$). These findings suggest that while the Australian attraction sector as a whole is not sophisticated in its approach to planning, those attractions that do plan are reasonably sophisticated.

Conclusions

The purpose of this study was to conduct a preliminary overview of the nature of strategic planning in the attractions sector. This was achieved by presenting the findings of a visitor attractions planning questionnaire that was completed by over 400 managers. While the geographical context for this study offers a broad overview of Australian visitor attractions, it is anticipated that the results may stimulate further research on attraction planning in other contexts, particularly within the Asia-Pacific region. It is argued here that in the context of a rapidly changing social and economic environment, appropriate planning systems will assist in the development and management of visitor attractions in the region.

The findings indicate that attraction managers that do engage in planning can improve their planning activities in some areas. For instance, competitors act as sources of information during the planning phase, but many attractions failed to include the activities of competitors when describing environmental forces that may impact on the attraction. There is also a perception amongst attraction

managers that don't plan that planning is expensive and not appropriate for small businesses. This is often not the case and indicates a level of ignorance or misunderstanding regarding the planning process and its benefits. Reasons dealing with lack of time and expertise are perhaps more valid and need to be addressed by the tourism industry.

Shrader *et al.* (1989) suggest that small businesses do not benefit from strategic plans primarily because they do not take the time or effort to formulate them. However, Robinson & Pearce (1984) argue that if planning enhances small firm effectiveness but is too complex, or time-consuming, then there is a need to design a planning process more appropriate to the needs of small firms. Following this logic, an exploratory study of visitor attraction planning characteristics creates a foundation for a detailed analysis of successful planning models in visitor attractions. The study also provides a benchmark for the comparison of planning efforts between visitor attractions at an international level. Parallel studies in destinations where the scale of tourism is similar (e.g. New Zealand, Canada, South Africa, Scotland) might offer fruitful bases of comparison. Cross-sector comparisons (e.g. specialty accommodation, tourism retail, etc.) are also possible, allowing researchers to assess the strategic planning efforts of various parts of the tourism industry.

References

Athiyaman, A. (1995). The interface of tourism and strategy research: An analysis. *Tourism Management*, 16(6), 447–453.

Athiyaman, A. & Robertson, R. W. (1995). Strategic planning in large tourism firms: An empirical analysis. *Tourism Management*, 16(3), 199–205.

Boekstein, M., Bennett, A. & Uken, E. (1991). How well tourists know their own attractions. *Annals of Tourism Research*, 18(3), 504–508.

Braun, B. M. & Soskin, M. D. (1999). Theme park competitive strategies. *Annals of Tourism Research*, 26(2), 438–442.

Brouthers, K. D., Andriessen, F. & Nicolaes, I. (1998). Driving blind: Strategic Decision-making in small companies. *Long Range Planning*, 31(1), 130–138.

Bryson, J. M. (1995). *Strategic Planning for Public and Nonprofit Organizations: A guide to strengthening and sustaining organizational achievement*. San Francisco: Jossey-Bass.

Check-Teck, F., Grinyer, P. H. & McKiernan, P. (1992). Strategic planning in the ASEAN region. *Long Range Planning*, 25(5), 80–90.

Chon, K. S. & Olsen, M. D. (1990). Applying the strategic management process in the management of tourism organizations. *Tourism Management*, 11(3), 206–213.

Cummings, S. (1993). Brief case: The first strategists. *Long Range Planning*, 26(3), 133–135.

David, F. R. (2004). *Strategic Management: Concepts and cases* (8th edn). New Jersey: Prentice-Hall.

Davies, A. & Prentice, R. (1995). Conceptualizing the latent visitor to heritage attractions. *Tourism Management*, 16(7), 491–500.

Deery, M. A., Jago, L. K. & Shaw, R. N. (1997). Profiling satisfied volunteers at a tourist attraction. *The Journal of Tourism Studies*, 8(2), 18–25.

Dillman, D. A. (1978). *Mail and Telephone Surveys: The total design method*. New York: John Wiley & Sons.

Dimmock, K. (1999). Management style and competitive strategies among tourism firms in the Northern Rivers. *Tourism Management*, 20(3), 323–339.

Evans, N., Campbell, D. & Stonehouse, G. (2003). *Strategic Management for Travel and Tourism*. Oxford: Butterworth-Heinemann.

Faulkner, H. W. (1994). Towards a strategic approach to tourism development: the Australian experience. In W. F. Theobald, (ed.). *Global Tourism: The next decade* (297–316). Oxford: Butterworth-Heinemann.

Fodness, D. (1990). Consumer perceptions of tourist attractions. *Journal of Travel Research*, 28(4), 3–9.

Garrod, B., Fyall, A. & Leask, A. (2002). Scottish visitor attractions: managing visitor impacts. *Tourism Management*, 23(3), 265–279.

Gilbert, D. C. & Kapur, R. (1990). Strategic marketing planning and the hotel industry. *International Journal of Hospitality Management*, 9(1), 27–43.

Gunn, C. A. (1988). *Vacationscape: Designing tourist regions* (2nd edn). New York: Van Nostrand Reinhold.

Gunn, C. A. (1994). *Tourism Planning: Basics, concepts, cases* (3rd edn). Washington, DC: Taylor & Francis.

Hall, C. M. (2000). *Tourism Planning: Policies, processes and relationships*. Harlow: Prentice Hall.

Henderson, J. C. (1999). Managing the Asian financial crisis: Tourist attractions in Singapore. *Journal of Travel Research*, 38(2), 177–181.

Jago, L. K. & Shaw, R. (1997). Tourist attraction and event patronage: an exploratory study of value system segmentation. In Bureau of Tourism Research. *National Tourism and Hospitality Research Conference 1997*. Proceedings presented at the Australian Tourism and Hospitality Research Conference, Sydney.

Jennings, P. & Beaver, G. (1997). The performance and competitive advantage of small firms: A management perspective. *International Small Business Journal*, 15(2), 63–75.

Johnson, P. & Thomas, B. (1991). The comparative analysis of tourist attractions. In C. P. Cooper (ed.), *Progress in Tourism, Recreation and Hospitality Management: Vol. 3* (114–129). London: Belhaven Press.

Jurowski, C. & Olsen, M. D. (1995). Scanning the environment of tourism attractions: A content analysis approach. *Journal of Travel and Tourism Marketing*, 4(1), 71–96.

Kargar, J. (1996). Strategic planning system characteristics and planning effectiveness in small mature firms. *The Mid-Atlantic Journal of Business*, 32(1), 19–35.

Kemp, S. & Dwyer, L. (2003). Mission statements of international airlines: a content analysis. *Tourism Management*, 24(6), 635–653.

Kotler, P., Brown, L., Adam, S. & Armstrong, G. (2001). *Marketing* (5th edn). Frenchs Forest, Australia: Prentice Hall.

Law, J., Pearce, P. L. & Woods, B. A. (1995). Stress and coping in tourist attraction employees. *Tourism Management*, 16(4), 277–284.

Leiper, N. (1990). Tourist attraction systems. *Annals of Tourism Research*, 17(3), 367–384.

Leiper, N. (1997). Big success, big mistake, at big banana: Marketing strategies in road-side attractions and theme parks. *Journal of Travel and Tourism Marketing*, 6(3/4), 103–122.

Lew, A. A. (1994). A Framework of Tourist Attraction Research. In Brent J. R. B. Ritchie & C. R. Goeldner (eds). *Travel, Tourism, and Hospitality Research: A handbook for managers and researchers* (2nd edn, 291–304). New York: John Wiley & Sons.

Lindsay, W. M. & Rue, L. W. (1980). Impact of the organization environment on the long-range planning process: A contingency view. *Academy of Management Journal*, 23(3), 385–404.

Marsden, A. (1998). Strategic management: Which way to competitive advantage? *Management Accounting*, 76(1), 32–37.

Martin, B. & Mason, S. (1990). What makes a successful attraction? *Insights*, 2, A35–37.

Matthews, C. H. & Scott, S. G. (1995). Uncertainty and planning in small and entrepreneurial firms: an empirical assessment. *Journal of Small Business Management*, 33(4), 34–52.

McClung, G. W. (1991). Theme park selection: factors influencing attendance. *Tourism Management*, 12(2), 132–140.

Milliken, F. J. (1987). Three types of perceived uncertainty about the environment: State, effect, and response uncertainty. *The Academy of Management Review*, 12(1), 133–143.

Milman, A. (2001). The future of the theme park and attraction industry: A management perspective. *Journal of Travel Research*, 40(2), 139–147.

Mintzberg, H. (1990). Strategy formation: Schools of thought. In J. W. Frederickson (ed.). *Perspectives on Strategic Management* (105–137). Boston: Ballinger.

Moscardo, G. (1999). *Making Visitors Mindful: principles for creating quality sustainable visitor experiences through effective communication*. Champaign, IL: Sagamore.

Moscardo, G. & Woods, B. (1998). Managing tourism in the wet tropics world heritage area: Interpretation and the experience of visitors on skyrail. In E. Laws, H. W. Faulkner, & G. Moscardo (eds). *Embracing and Managing Change in Tourism: International case studies* (307–323). London: Routledge.

Moutinho, L. (1988). Amusement park visitor behaviour – Scottish attitudes. *Tourism Management*, 9(4), 291–300.

Moutinho, L. (ed.). (2000). *Strategic Management in Tourism*. Wallingford: CABI. Olsen, M. D., West, J. J. & Tse, E. C. Y. (1998). *Strategic Management in the Hospitality Industry* (2nd edn). New York: John Wiley.

Orpen, C. (1985). The effects of long-range planning on small business performance: a further examination. *Journal of Small Business Management*, 23(1), 16–23.

Patterson, R. A. (1986). Strategic planning for small businesses. In J. R. Gardner, R. Rachlin & A. Sweeny (eds). *Handbook of Strategic Planning* (24.1–24.20). New York: John Wiley.

Pearce, J. A. & Robinson, R. B. (2005). *Strategic Management: Formulation, implementation, and control* (9th edn). Boston: McGraw Hill.

Pearce, P. (1998/1999). Marketing and management trends in tourist attractions. *Asia Pacific Journal of Tourism Research*, 3(1), 1–8.

Pearce, P. L. (1989). Towards the better management of tourist queues. *Tourism Management*, 10(4), 279–284.

Pearce, P. L. (1991). Analysing tourist attractions. *The Journal of Tourism Studies*, 2(1), 46–55.

Peters, T. J. & Waterman, R. H., Jr (1982). *In Search of Excellence: Lessons from America's best-run companies*. Cambridge: Harper & Row.

Phillips, P. & Appiah-Adu, K. (1998). Benchmarking to improve the strategic planning process in the hotel sector. *The Service Industries Journal*, 18(1), 1–17.

Phillips, P. A. & Moutinho, L. (2000). The strategic planning index: A tool for measuring strategic planning effectiveness. *Journal of Travel Research*, 38(4), 369–379.

Poon, A. (1993). *Tourism, Technology and Competitive Strategies*. Oxon: C.A.B. International.

Powell, T. C. (1992). Strategic planning as competitive advantage. *Strategic Management Journal*, 13(7), 551–559.

Quinn, J. B. (1980). *Strategies for Change: Logical Incrementalism*. Homewood, IL: Irwin.

Ramanujam, V. & Venkatraman, N. (1987). Planning system characteristics and planning effectiveness. *Strategic Management Journal*, 8(5), 453–468.

Rhodes, D. W. (1988). Can HR respond to corporate strategy? *The Journal of Business Strategy*, 9(2), 57–58.

Richards, G. (2002). Tourism attraction systems: Exploring cultural behavior, *Annals of Tourism Research*, 29(4), 1048–1064.

Robinson, R. B., Jr. (1982). The importance of 'outsiders' in small firm strategic planning. *Academy of Management Journal*, 25(1), 80–93.

Robinson, R. B. & Pearce, J. A., Jr II. (1984). Research thrusts in small firm strategic planning. *The Academy of Management Review*, 9(1), 128–137.

Rovelstad, J. M. & Blazer, S. R. (1983). Research and strategic marketing in tourism: A status report. *Journal of Travel Research*, 22(2), 2–7.

Sexton, D. L. & Van Auken, P. (1985). A longitudinal study of small business strategic planning. *Journal of Small Business Management*, 23(1), 7–15.

Shrader, C. B., Mulford, C. L. & Blackburn, V. L. (1989). Strategic and operational planning, uncertainty, and performance in small firms. *Journal of Small Business Management*, 27(4), 45–61.

Smeltzer, L. R., Fann, G. L. & Nikolaisen, V. N. (1988). Environmental scanning practices in small business. *Journal of Small Business Management*, 26(3), 55–62.

Soteriou, E. C. & Roberts, C. (1998). The strategic planning process in national tourism organizations. *Journal of Travel Research*, 37(1), 21–29.

Sun, L. & Uysal, M. (1994). The role of theme parks in tourism. *FIU Hospitality Review*, 12(1), 71–80.

Teare, R. & Boer, A. (1991). *Strategic Hospitality Management: Theory and practice for the 1990s*. London: Cassell Educational.

Tourism New South Wales (1999). *Attractions Development Strategy for Regional New South Wales: Towards a successful New South Wales attractions sector*. Sydney: Author.

Tribe, J. (1997). *Corporate Strategy for Tourism*. London: International Thomson Business Press.

Waalewijn, P. & Segaar, P. (1993). Strategic management: the key to profitability in small companies. *Long Range Planning*, 26(2), 24–30.

Wheelen, T. L. & Hunger, J. D. (1998). *Strategic Management and Business Policy: Entering 21st century global society* (6th ed.). Reading, MA: Addison-Wesley.

Wilson, I. (1994). Strategic planning isn't dead – it changed. *Long Range Planning*, 27(4), 12–24.

World Tourism Organization (1999). *Tourism, 2020 Vision: Executive summary updated*. Madrid, Spain: Author.

World Tourism Organization (2002). *Tourism Highlights Edition 2002*. Madrid, Spain: Author.