

Planning Systems in Australian Tourist Attractions

A QUALITATIVE STUDY OF ATTRACTION OPERATORS

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Study Overview

Researching Planning in Tourist Attractions

Background

By all accounts, the future of tourism appears optimistic. The World Tourism Organisation (1998, 2003) predicts that international visitor arrivals will increase from 714 million in 2002 to 1.6 billion in 2020. Similarly, Cetron (2001) recognises that despite difficult challenges, the tourism industry has flourished, and will continue to do so.

This research is designed to assist tourism researchers, and potentially tourism operators, to think about the future of tourist attractions in Australia, with particular reference to planning and management. Tourist attractions are frequently described as the key components of a destination's tourism industry, yet they are under-researched and poorly understood (Gunn, 1994; Leiper, 1990; Pearce, 1991; Lew, 1994; Swarbrooke, 2002). Gunn (1988) describes attractions as the 'first power', 'lodestones for pleasure' and the real energiser of tourism in a destination. Pigram (1983) states bluntly that without attractions tourism as we know it would not exist. Additionally, several authors have supported the notion that attractions are the primary reason for the existence of the tourism system (Mill and Morrison 1985, Gunn 1988, Leiper 1990).

According to Gunn (1994) tourist attractions serve two key functions in the tourism system: 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 and Thomas, 1990). An Australian Bureau of Statistics (1990) study examined 1899 Australian attractions and concluded that they accounted for more than 16 000 employees and had a cumulative gross income of nearly \$630 million. However, anecdotal observations suggest that the Australian attraction sector consists largely of small businesses operated by volunteers or 'mum and dad' teams. If these attractions are indeed at the core of Australia's tourism industry it becomes increasingly important to understand their characteristics and what they are doing to prepare for the future.

The purpose of this study is to investigate the planning processes of Australian tourist attractions in the context of emerging trends. Good businesses prepare for the future by making plausible assessments of likely events and preparing plans to deal with them.

The Research

The research presented in this study focuses on how attractions plan for the future. The aims of the study are:

Aim 2.1: To explore the planning tasks, procedures and systems in tourist attractions in order to develop a framework of attraction planning.

Aim 2.2: To investigate how managers perceive trends that are relevant to the future operation of tourist attractions.

Data Collection

Pilot Study

The research consisted of a pilot study of managers in two tourist attractions in North Queensland, Australia, followed by twelve semi-structured interviews conducted with key personnel across a range of attractions along Australia's East Coast. The pilot study focused on the wording, clarity, order and format of the interview rather than respondent answers. Two attraction managers provided feedback that resulted in minor changes to some questions. While managers did provide answers, the aim of the pilot study was to test comprehension and to refine question prompts. Advice about how to approach and inform study participants was also sought from managers.

An interesting item that emerged from one of the participants in the pilot study was the capacity to use **tourism award entries** as a planning tool. Australia conducts an annual program of regional, state and national tourism awards. In order to participate in this activity, tourism businesses must prepare submission documents that summarise, among other things, their business plans, strategies and performance. The idea of using these documents as planning tools is intriguing, however it is mentioned here because it was not a theme that emerged from the findings of the study.

The Process

Semi-structured interviews were conducted with management personnel at 12 Australian tourist attractions. The process of selecting managers is outlined in the ensuing discussion of the study sample. It was assumed that these managers had an adequate understanding of planning at their attraction. Initial contact with potential interviewees was made using a mailed invitation that outlined the nature of the study. The invitation included a list of the interview questions, a fact sheet about the research and a summary report of findings from earlier chapters. Eight interviews were conducted in January 2002, while a further four were undertaken in April 2003. The duration of the interviews varied from one hour to two and a half hours.

The Sample

The sample of twelve attractions was selected using a non-random stratified sampling technique. The main purpose of in-depth interviews is to gain understanding and meaning rather than generalising findings. The focus is therefore on identifying managers who match a predetermined set of characteristics. This sampling approach for this study was designed to maintain diversity in the sample in terms of: size (visitor numbers); location

(regional or metropolitan); attraction type and planning. Of the twelve managers initially approached with an invitation, eight agreed to participate in the study. All of the managers were owners, CEOs or senior managers of attractions. *Table 1.3* summarises the characteristics of the attractions taking part in the qualitative study.

TABLE 1.1 – Characteristics of tourist attractions participating in the study

	Size (Visitor No.)	Type	Ownership	Location	Est.	Interviewee Background
SR1	10 000	Museum	Private	Regional	1970	Alternative Medicine; Farming, Archaeology
SR2	35 000	Nature-based	Private	Regional	1989	Tertiary Education
SR3	32 000	Nature-based	Private	Regional	1990	Farming
MR3	125 000	Agricultural	Private	Regional	1983	Engineering, Horticulture
MR1	400 000	Manufacturing	Private	Regional	1985	Hospitality
MR2	124 000	Aquarium	Statutory Authority	Regional	1987	Chemistry, Marine Biology
LR1	560 000	Australian Culture	NFP Company	Regional	1970	Public Sector Management
MM1	346 000	Museum	Statutory Authority	Metropolitan	1991	Design; Museum Administration
MM2	143 000	Science and Technology	Govt	Metropolitan	1989	Chemistry, education, public service
LM1	1 000 000	Gallery	Govt	Metropolitan	c1880	Sculpture, education
LM2	600 000	Museum	Govt	Metropolitan	1988	Art history
LM3	1 200 000	Aquarium	Private	Metropolitan	1988	Chemistry, education

To maintain confidentiality, attraction names have been substituted with alphanumeric respondent codes that are used throughout the remainder of this chapter. These codes are structured so that the reader can readily ascertain the size and location of the attraction. The first letter represents attraction size (**S**mall, **M**edium, **L**arge) while the second represents locality (**R**egional or **M**etropolitan). For example, SR1 is a *small* attraction in *regional* Australia.

The Interviews

The interview schedule consisted of 10 questions categorized into three broad topics.

TABLE 1.2 – Interview Questions

1.	I would like to start by asking you to tell me about your attraction...
2.	Tell me a bit about your own background?
3.	If you were to give a guest lecture about planning, how would you explain the concept to students?
4.	Can you give me an idea of the tasks that you think are most important when you plan for your attraction?
5.	Who is involved with planning at this attraction?
6.	Where do you look around for information and advice when you are planning for your attraction?
7.	What do you think are the most important or useful parts of your plan?
8.	A common thread in the research we have been doing is the fact that larger attractions are much more likely to plan. What are your thoughts on this?
9.	I imagine that during the planning process you would have given some thought to the future of your attraction and to the tourism industry in general. Would you like to share some of your thoughts about this future with me?
10.	How do you think attractions, and the way they are managed, will change in the next 20 years?

Data Analysis

The transcripts were analysed using an inductive thematic approach, which involves generating classes of general patterns or themes that emerge from within the data. The research therefore adopts a grounded theory approach to analysis that involves identifying theoretical categories that are derived from the data through the use of a continuous comparative method (Glaser and Strauss, 1967). The underlying philosophy of this qualitative approach was to allow the central themes to emerge from the data through an inductive process, rather than being forced to fit a preconceived theoretical framework. The process involved scanning for similar issues, ideas and concepts by reading the interview summaries numerous times. These were then labelled to establish an index of themes for each interview question. The themes are summarised in tables. Quotations are also presented throughout this report to illustrate different views. All quotations are presented in italics. Key words have been presented in bold in some quotations in order to highlight key themes and consistent threads.

Attraction and Management Background

Contextual influences on Planning in Tourist Attractions

Attraction Background

Question 1: *I would like to start by asking you to tell me about your attraction.*

The first question requested information about the history and background of the attraction. While a brief summary of the sample was provided in the methodology, it is useful to draw some distinctions between attractions based on their history. An examination of attraction histories provided by managers highlights two types of attraction development models:

1. 'Serendipitous' or accidental attractions that develop gradually, often with little formal planning in the initial stages (i.e. SR3, MR1, MR3)
2. 'Premeditated' attractions that are planned from the start

This distinction was also identified by two managers (SR2, LR1) during the interview process. It is an important distinction that will emerge on several occasions in the pages that follow.

Management Background

Question 2: *Tell me a bit about your own background?*

Two salient points about respondent background are relevant to the analysis of planning in tourist attractions. Firstly, it is useful to examine the background of managers in terms of early career roles and qualifications. Secondly, it is necessary to determine how managers have gained any knowledge about management and planning.

Responses to this question provide a good indication of the diversity of personnel in the Australian tourism industry (*Table 2.1*). The results show that only two of the managers (SR2, LR1) had a formal management background, with SR2 being an educator in this field. Only one respondent (MR1) had a hospitality and tourism background. Interestingly, education featured prominently in the background of four managers (SR1, MM2, LM1, LM3), while the sciences (chemistry, marine biology, horticulture) also appeared to be a popular pathway into the attraction sector.

TABLE 2.1 – Career background of interviewees.

	Attraction Type	Current Role	Interviewee Background
SR1	Museum	CEO; Director	Alternative Medicine; Farming, Archaeology
SR2	Nature-based	Director	Tertiary Education (Management)
SR3	Nature-based	Owner	Farming, public sector
MR3	Agricultural	General Manager	Engineering, Horticulture
MR1	Manufacturing	Tourism Manager	Hospitality
MR2	Aquarium	General Manager	Chemistry, Marine Biology
LR1	Australian Culture	Deputy Executive Director	Public sector management
MM1	Museum	Marketing Manager	Design; Museum Administration
MM2	Science / Technology	Director	Chemistry, education, public service
LM1	Gallery	Head of Public Programs	Sculpture, education
LM2	Museum	Education & Visitor Services Manager	Art history
LM3	Aquarium	Marketing Manager	Chemistry, education

Little comparative research about the career pathways of tourism operators exists in the tourism literature. Some studies have investigated career pathways in the hospitality sector, but other areas of tourism have been ignored. An Australian study by Ladkin (2002) found that the percentage of hotel managers with a vocational education was low in comparison with European studies. She suggested that this might be due to the relatively recent development of vocational hospitality education in Australia. It was further noted that only a small number of managers had obtained a postgraduate qualification in a hospitality course, despite the increasing number of institutions offering higher education hospitality courses. It is suggested that the recency of professional tourism qualifications in the Australian higher education is also a factor in this research. However, this explanation is not wholly satisfactory, as business and management courses have been established for a long time.

Research by Keep and Mayhew (1988) suggests that training and development can help to improve small business. From a planning perspective, the background of many managers would appear to indicate a lack of strategic management training. Managers were therefore prompted to indicate what factors contributed to their understanding of planning procedures. It was found that five managers developed a familiarity with planning through practical experience and on-the-job learning:

I grew into the current position (SR1).

Managerial and planning skills, including the ability to communicate with a large range of audiences, have evolved from a **long association** with the gallery (LM1).

Administrative and technical management skills have been developed through **practical experience** (MR2).

Planning is done by **experience**, adapting what has worked and rejecting what hasn't (LM3).

My planning and management skills have developed during 22 years of **experience** in local government and administration (LR1).

These excerpts indicate the importance many managers place on “on the job” learning.

LR1, LM1 and LM3 also noted that the CEOs of their respective organisations displayed exemplary leadership qualities and were excellent **mentors** in the planning process. In some cases, this role was also partly supported by boards of directors. It has been recognised by some authors that mentoring can complement various strategic organisational initiatives (Friday and Friday, 2002). In effect the mentoring role provides a 'safety net' in larger attractions, whereby superiors are able to guide planning decisions and correct planning inconsistencies. This function is not present in the smaller attractions in the sample, and managers have to rely instead on personal knowledge, or the expertise of outside consultants. In some small to medium attractions planning knowledge was supplemented with practical experience *as well as* additional external training (SR3, MR3). In the case of SR3, a lack of planning expertise was addressed by permanently employing external management consultants.

SR2 was the only respondent indicating that planning skills were gained through a formal knowledge of strategic management. A focus of this research has been to determine whether formal strategic planning, as taught by tertiary strategic planning courses and texts, plays a large role in attraction planning. With the exception of SR2, the results would indicate that this is not the case. In retrospect, it seems that an understanding of planning is gained directly through personal experience, supported in some cases by mentors or external consultants. This may be due to the fact that it is more difficult for employers and employees in small and medium enterprises to find the time to train (Stanworth, Purdy and Kirby, 1992). In addition, some businesses may be concerned that training will encourage turnover by making staff more attractive to other employers.

Management Perceptions of Planning

Views about the meaning and process of planning

The Meaning of Planning

Question 3: *If you were to give a guest lecture about planning, how would you explain the concept to students?*

The question above was primarily designed to evoke a concise response regarding perceptions of planning. Responses from managers typically included tasks or factors deemed to be essential for successful planning. Interview responses were evaluated by grouping these factors into broad themes, presented in *Table 3.1*

TABLE 3.1 – Themes identified from management perceptions of planning

Theme	Focus	Respondents	Count
Vision, mission, path, looking forward	Internal	MR1, SR2, SR1, LM1, MM2, MR2	6
Consider budget, resources, figures, projections	Int. / Ext.	MR3, LM2, SR2, SR3, MR2	5
Define identity, core business, concept	Internal	SR1, LM2, MR2, MR3	4
Customers, audience	External	LM1, LM2, SR2	3
Good management, staff	Internal	SR1, SR3	2
Entrepreneurship	Internal	SR1, MR3	2
SWOT, personal analysis, competitor analysis	Int. / Ext.	SR2, MR2	2
Setting goals, strategies	Internal	MR2, MM1	2
Logistics	Internal	MR3, SR3	2
Community	External	SR2	1

The table also indicates whether each theme has an internal focus or an external focus. Evans et al (2003) present a schematic of the strategic planning process in which planning tasks are clearly segmented into internal analysis and external analysis. It is thus useful to consider the themes through this framework. In doing so, it should be noted that *Table 3.1* indicates a predominance of planning tasks that are internal to the organisation. Each of the themes is discussed in greater detail in the ensuing text.

Vision

Table 3.1 shows that planning was frequently perceived as a tool for envisioning the future. Planning in this instance provides a framework for attraction managers to express an ideal end state for the business within a defined planning period. The following excerpts highlight the visionary component of planning:

Planning is about **looking forward**, not managing the business from day-to-day on an operational basis. (SR2)

A pilot in an aircraft has to have a flight plan. In the same way a manager of a business must have a **path to show where the business is going**. (MR1)

Planning is about deciding **where you want to be** and then working out how to get there. (MR2)

One manager (MM2) suggested that strategic vision was a “convenient filter” to guide managers when new opportunities arose. Another respondent viewed ‘vision’ as a mechanism for growth and progress:

It is important to have a long-term **vision** for the potential of the business. The **need to grow** - and that growth – is an important part. Unless there’s energy going into something all the time it **stagnates** and you don’t attract people. (SR1)

Budgets and resources

The allocation and management of resources was also viewed as a key aspect of planning. Five managers indicated that a consideration of budgets, resources and projections were an important part of planning. This theme can be observed across attractions of all size. These items were grouped together because they all essentially deal with the balancing of income with resource expenses.

One respondent stated that:

When **resources** are scarce you have to make sure you get maximum value out of what you are doing and the only way to do that is in the context of a very clear strategy about who and what you want the organisation to be. (MR2).

The manager of a small regional attraction that had been burdened in the past by over-inflated projections and expectations stated that:

It is important to **do your sums**, be realistic. Have your **figures** checked by knowledgeable people in the tourism industry and use local tourism networks. (SR3)

The ability of planning to facilitate resource allocation was identified by 58.7% of attractions as a reason for engaging in planning in Chapter 4. While budgeting and

resource allocation is chiefly an internally driven process, it should be recognised that some managers also include projections of external factors such as seasonality and visitor patterns. The need for accurate projections that support budgeting and resource allocation is discussed later in this chapter.

Identity and Core Business

Three managers said that planning should include a consideration of the core identity of an attraction. This planning element is wholly driven by internal competencies and perceptions of the role of the attraction. While it is closely related to the concept of a vision, an identity is rooted in the present, while the vision is a desired end state in the future. It is interesting to note that with the exception of MR2, the proponents of this approach are not among the attraction managers postulating that a vision is an essential ingredient in planning. The concept of an identity and vision is connected by MR2 in the following manner:

Planning lets us get a good handle on **who we are** and **what we would like to be** and working out the best way to get there. (MR2)

The development of an identity is also important from a marketing perspective as one respondent indicated:

It is necessary to develop an **identity** that can be used in terms of strategic planning and marketing. (SR1)

The notion of corporate identity has been recognised as an integral part of strategy, and is closely linked to the development of organisational competencies and the 'strengths and weaknesses' component of the SWOT framework (Gray and Smeltzer, 1985). Corporate identity has also been recognised by some authors as strategic resource and a source of competitive advantage (Melewar and Jenkins, 2002).

Within the tourism literature 'identity' has been discussed with regards to cultural identity (Ascher, 1985; Ashworth and Larkham, 1994; Palmer, 1999), and the identity of destinations (Morgan and Prichard, 1998; Meler and Ruzic, 1999). The latter appears to be synonymous with the more widely used expression of destination *image*. However, the marketing literature suggests some differences between the concepts of image and identity. Christensen and Askegaard (2001, p.296), in their semiotic analysis of corporate identity and image, propose that identity is the "sum of symbols and artefacts designed and managed in order to communicate the ideal self-perception of the organisation to its external publics". Image, on the other hand, refers to the "reception of these communication efforts by the external world". This perspective creates a clear distinction between the internally crafted 'identity' of an organisation and its externally perceived 'image'.

This relationship between identity and image is further clarified by the notion that the effective management of an organisation's *identity* will result in the acquisition of a positive corporate *image*, and over time, a favourable corporate *reputation* (Balmer and Wilson, 1998). Identity, in this sense, is the way that employees and managers identify with the organisation based on elements that are central, enduring and distinctive.

However, the role and formulation of identity in strategic planning is conspicuously absent from most studies dealing with strategic planning. It is suggested here that the diverse nature of the attraction sector may create a greater need for defining identity than may be the case in other more homogenous industries.

Customers and community

Given that the tourism industry, including the attraction sector, is a service industry it is somewhat surprising that only three managers included customers (or 'audiences') in their initial descriptions of planning. Two of the managers were large metropolitan attractions with a focus on exhibits, while the third was a small regional nature-based attraction. One respondent stated that:

It is important to identify **audiences** who are not visiting the facility, and to develop programs to attract these audiences (LM1).

The consideration of customers is concerned with the attraction's external environment. Consequently, a consideration of customers in a broader planning context may be challenging for attraction managers who do not have access to good information sources or sophisticated information management processes.

Despite the role and potential impacts of tourism in *communities*, particularly in a regional context, only one attraction (SR2) noted the need to include this aspect as part of the planning process.

Management and Entrepreneurship

In their analysis of successful planning, two managers (SR1, SR3) suggested that good management, board members and staff were essential. SR1 further suggested that an entrepreneurial approach was needed by management, a point that was supported by MR3:

Planning only takes place after an **entrepreneurial idea**. In turn, entrepreneurship only occurs through a combination of product and business knowledge and a willingness to have an open mind. (MR3)

Notably these comments stem from small and medium attractions in regional areas. Two of the three managers noted above can be classified as 'accidental' attractions (SR1, MR3). Herein lies an interesting pattern that emerges on several occasions throughout this chapter. The emergence of these attractions has an entrepreneurial flavour: an individual reacted to an opportunity to create a new tourist experience. This element is missing in larger attractions, particularly public attractions that are planned from inception to meet community or cultural needs.

SWOT analysis, strategies and goals

Some attraction managers chose to describe planning in terms of the outputs of the planning process, namely documented SWOT and competitor analyses, goals for the future, and strategies to attain these goals. Only one respondent referred to the SWOT analysis construct when describing planning:

Strategic planning is critical in terms of the **strengths and weaknesses** of the organisation and the **opportunities and threats** presented by the environment. (MR2)

This approach to planning is strongly advocated in strategic planning texts (cf. David, 2001; Wheelen and Hunger, 1995; Evans et al, 2003). A second respondent (SR2) described planning as a process involving competitor analysis, an aspect which is commonly included as part of an external analysis of opportunities and threats. Interestingly, SR2 also felt that planning should include a personal analysis:

Self-analysis should focus on **personal strengths and weaknesses** and reasons for entering into a business. There needs to be an assessment of what is required to start a business, run a business and make it successful. (SR2)

While the establishment of goals and strategies is a common outcome of the strategic planning process, only two managers noted these in their descriptions of planning:

The [planning] process involves setting **goals**, or a suite of things that have to be done by a particular time. Then you work back from there...what do I have to do to do that? (MR2)

Planning is a layered process, with a broad strategic plan guiding the organisation, while more detailed, shorter-term plans are used to assist in reaching the overall **goals and strategies**. (MM1)

Logistics

Two regional attraction managers highlighted a logistic element in their descriptions of planning:

Planning consists of an initial concept, **logistics** to develop the concept, and the ability of the concept to generate a return. (MR3)

When planning [for the attraction], a range of decisions and **logistics** had to be taken into account and unforeseen events could not be planned for. (SR3)

SR3 added that unforeseen events created a discrepancy between “textbook” planning and “real life”. The *Australian Concise Oxford Dictionary* lists logistics as “the detailed organisation and implementation of a plan or operation.” From this perspective, it would seem that a logistics component in planning is commensurate with the implementation task discussed in the literature review.

The Planning Process

Question 4: *Can you give me an idea of the tasks that you think are most important when you plan for your attraction?*

Question 4 was designed to evoke a description of the planning process within each attraction. A detailed set of prompts resulted in a rich set of descriptions of planning procedures. The discussion of these descriptions has been broken down into series of key themes, these being: key planning tasks, objectives and strategies, the setting of KPIs and evaluation of performance, environmental monitoring and analysis, the formality and timing of planning, planning meetings and idea generation, time devoted to planning tasks the flexibility and review of planning documents. These components are discussed in the following pages.

Key planning tasks

Some attraction managers provided a list, or a series of steps that were undertaken as part of the planning process, however, many spoke in general terms about various aspects of planning at their attraction. A thematic analysis of the responses provides a brief summary of tasks undertaken by each attraction. Planning tasks were grouped according to similarity into themes. This analysis deconstructs the planning process of individual attractions in order to look for consistency in tasks and processes. Tasks that were undertaken by more than one attraction are presented in *Table 3.2* These tasks are deliberately ordered to provide some sense of chronology. It should be noted here that the data is constrained by the ability of managers to recall planning tasks. Even after prompting, some managers may not have described all tasks undertaken by the organisation.

TABLE 3.2 – Key planning tasks mentioned by tourist attraction managers

Planning Task	SR1	SR2	SR3	MR1	MR2	MR3	LR1	MM1	MM2	LM1	LM2	LM3
Brainstorming / idea generation	✓					✓						
SWOT / SWOTCH Analysis		✓							✓			
Budgeting / Financials		✓			✓	✓	✓		✓			
Staff and Resources		✓			✓		✓		✓			
Planning meetings	✓	✓		✓		✓		✓	✓		✓	✓
Setting objectives	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓
Setting strategies	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓
Setting KPIs /targets	✓	✓	✓		✓			✓	✓	✓	✓	✓
Writing a formal plan				✓				✓	✓	✓	✓	
Review Plans		✓			✓		✓					✓
Monitoring of Environment	✓		✓		✓	✓	✓	✓		✓	✓	✓
Evaluation of Performance		✓	✓		✓	✓	✓		✓			✓

Objectives, strategies

It is clear from the summary presented in *Table 3.2* that attraction managers undertake a number of the key tasks identified by traditional models of strategic planning. In particular, most (11) attraction managers identified objectives and strategies for their business, although these were not always formalised in a planning document. MR3, was the only attraction that did not use a formal set of objectives and strategies in planning for the attraction. This attraction has focussed instead on developing yearly budgets and projects and identifying new markets and opportunities to increase visitor yield.

Setting KPIs and evaluating performance

Nine attraction managers identified the setting of key performance indicators (KPIs) in their planning efforts. These indicators are usually used to measure whether particular objectives have been achieved. Interestingly, of those attractions using KPIs, only five (5) managers noted that the evaluation of performance was an important task in the planning process. This does not mean that other attractions did not monitor performance, it simply indicates that only a few attractions explicitly recognised this as a key planning task. This creates a subset of attractions with performance-driven planning structures, as performance is both measured regularly and integrated into the planning process.

A focus on performance allowed management to make appropriate operational changes, sometimes on a daily basis (*Table 3.3*). LM3 stated that daily visitor targets were an important management tool. Daily visitor numbers at this attraction were compared with the same day the previous year (e.g. first Tuesday in May with the first Tuesday in May the previous year). This allowed attraction management to know exactly how it was performing in terms of visitor numbers as well as café/gift shop sales on a day-to-day basis. The organisation recorded basic demographic information, such as postcodes, from visitors when they entered the facility. Visitor demographics were compiled monthly in order to review how each market was performing compared with the same month the previous year. Year-to-date visitor statistics were also compiled.

TABLE 3.3 – Visitor-related performance
measures used by attractions in evaluating performance

Performance Measures	Respondents	Count
<i>Visitor Numbers</i>		
Daily	MR2, LM3	2
Weekly	SR3	1
Monthly	SR2, SR3, MR2, MM2, LM3	5
Quarterly	SR2, MM2	2
Yearly	SR2, MR2, LM3	3
Visitor satisfaction	LR1	1
Visitor yield	MR3, MM2	2
Merchandise/food sales	SR2	1

Where performance evaluations were not explicitly linked to the KPIs (MR3, LR1), the measurement of performance allowed management to monitor visitors. In the case of MR3, visitor yield was monitored. In this instance the manager was particularly interested in the profit generated per visitor. The manager noted that the attraction had a threshold of optimum visitor numbers. The attraction did not seek to increase visitor numbers beyond

this threshold but instead focussed on maximising the yield per visitor. Beyond the threshold the attraction had to employ additional staff and the yield per customer dropped, thus affecting net profit. The manager's philosophy is:

The more fun you have, the more money you spend. The more money you spend, the more fun you'll have. (MR3)

At LR1, management used key performance indicators as "measurables" but the intention was not to use these figures to guide the organisation. KPIs were not used in the organisation's planning document and the manager felt that they did not make the business any better; they simply allowed managers to *measure* the progress of the organisation.

In tourism it is really the visitor end of the market that drives the equation and if you're so rigid in the corporate plan that all you're looking at are achieving certain **benchmarks** and certain goals you can often be overlooking what the visitor is wanting. You've got to drive the business through **visitor evaluation** and constant **feedback**. (LR1)

Emphasis was thus placed on the measurement of both visitor numbers and *satisfaction*, which were measured daily and analysed for problems, concerns, complaints, issues and suggestions.

Managers at MM2 combined visitor performance measures with financial performance. Financial budgeting was conducted on a cash-flow basis and cross-referenced with visitor numbers on a monthly basis to identify variations in yield.

SR2 made use of a sophisticated suite of software products to manage performance. Some of these software products are commercially available under the *Maus* brand name. The use of technology allows this small attraction to access advanced analyses of a variety of performance statistics for any time frame (daily, weekly, monthly, yearly etc.). The software also facilitates broader planning tasks, including managing resources, generating planning documents and conducting financial analyses, competitor analyses, target market analyses and so forth. An accounting package provides management with an analysis of wages, expenses, budget projections and performance to date. A monthly and weekly breakdown of performance is based on 'cost centres' within the attraction. The software also assists planning by identifying how much of every item is sold at the attraction. The profitability of each item can be assessed and souvenirs and refreshments that are not profitable can be replaced. Information produced by the organisation's planning and accounting software is reviewed weekly and abnormalities are assessed over both monthly and seasonal periods. The software package allows management to compare exact values with anecdotal feedback from staff. The use of this software allows the attraction to optimise every aspect of its operations in order to maximise profitability.

To summarise, the discussion of performance indicators and measurement suggest that it is a key aspect of planning, and an important activity for many of the attractions in the sample. While there are a number of approaches to the measurement of performance, the analysis highlights one consistency: there is a strong focus on visitor numbers, which are most commonly reviewed on a monthly basis. Furthermore, the case of SR2 clearly

illustrates that even small regional attractions can achieve a detailed understanding of their performance through the use of technology.

Environmental analysis and monitoring

While conventional planning often separates the notion of environmental analysis and environmental monitoring, these appear to be conducted simultaneously in tourist attraction planning. Environmental monitoring was found to be either formal or informal. Only two attraction managers (SR2, MM2) acknowledged that they conducted a formal SWOT analysis. This framework typically considers external environmental factors by assessing external *opportunities* and *threats*, while *strengths* and *weaknesses* are concerned with the internal aspects of the organisation (Evans et al. 2003). MM2 extended the SWOT concept with a 'SWOTCH' framework, in which the additional components are an analysis of *challenges* and *helps*.

Another formal approach to assessing environmental factors was adopted by MM1 and LM2, both of which used 'evaluation divisions' within their organisation. The evaluation division in MM1 consisted of a full-time analyst employed to continuously and systematically monitor elements of the attraction's performance and external environment. A similar approach was used at LM2, which employed three full time staff in its evaluation department. A semi-structured approach to competitor analysis existed amongst a cluster of metropolitan attractions in the sample, many of which shared visitor and promotional data with competitors in a cooperative fashion.

Other attractions have adopted an approach that can best be described as informal. In most instances managers in these attractions collect information about competitors and the external environment on an *ad hoc* basis. This type of analysis is typically sporadic, with short bursts of activity such as competitor analysis, consultancy projects and periodic visitor studies. Some information appeared to be gleaned from the mass media, with managers typically mentioning events such as instability in the airline and tourism industries, economic and political developments (both in Australia and overseas), exchange rates, government policy and visitor patterns. SR1 stated that a major source of information about the attraction's environment included subscription to key international journals and attendance at major industry conferences.

In some cases information about the external environment was gained through anecdotal evidence. For example, MR1 specifically noted a trend toward people travelling in larger groups, and the tendency for older couples to travel in "4WD convoys" with friends. The retired market was a key target for the attraction. Consequently the impacts of fuel prices as well as the seasonal/climatic nature of visitation were important influences on the travel patterns of this group.

Formality and timing of planning

As noted in the review of literature, planning formality has been measured using a number of techniques, including the performance of routine planning tasks, the number of planning tasks and the presence or formality of planning documents. Earlier chapters examined formality in terms of the presence or absence of formal short or long term plans. This chapter examines the formality of planning documents and the time horizon typically employed by attractions. As shown in *Table 3.2*, five attractions explicitly recognised the writing of a formal plan as a key planning task. The same five attractions adopted conventional three-year and five-year time horizons (*Table 3.4*). It is noteworthy that small attractions are not among this group, and regional attractions appear to be under-

represented. This may be due to the fact that the larger metropolitan attractions typically report to a board of directors, with the strategic plan acting as a formal communiqué of management's intentions over a predetermined timeframe. A larger organisation also needs to communicate plans to staff and management across departments.

TABLE 3.4 – Time horizon and formality of written plans

Formality and Time Horizon	Respondents	Count (n=12)
Formal 3 year strategic plan	MM1, LM2	2
Formal 5 year strategic plan	LM1, MM2, MR1	3
Formal rolling plan /procedures manual	SR1, SR2, LR1	3
Marketing plan	LM3, MR2	2
Informal – no strategic plan	MR3, SR3	2

Three attractions updated their strategic plans frequently by using rolling plans or procedures manuals. LR1 maintained a detailed 5-year rolling plan that was revised roughly every 18 months. The manager commented on the inappropriateness of simply developing a 5-year plan and running with it. The LR1 plan contained a set of guiding principles, mission, key issues identified for the period, corporate goals and a series of divisional plans. The divisional plans detailed objectives and strategies for areas such as marketing, operations, product development and historical plans. These objectives and strategies were underpinned by the organisation's budgetary process.

The planning concept adopted by SR1 and SR2 was similar, but the core planning document consisted of a procedures manual which was updated when required. SR1 used a detailed procedures manual to guide every aspect of the business. The procedures manual contained operational procedures, 'ten commandments' of the business, induction checklist, safety procedures, training and development, guidelines for welcoming visitors and an overview of the business. Extracts of the business plan with the organisation's mission statement and goals was also included in the manual. Operational procedures included in the SR2 procedures manual are presented in *Table 3.5*.

TABLE 3.5 – Contents of SR2 Operational Procedures Manual

<i>Operational Procedures</i>	
<ul style="list-style-type: none"> ▪ General principles ▪ Creating quality image ▪ Stationery ▪ Signage ▪ Procedures for boardwalk guides ▪ Customer service expectations ▪ Exceeding customer service expectations ▪ Managing customer service ▪ Service excellence ▪ Dealing with difficult situations ▪ Personnel procedures ▪ Setting goals ▪ Workplace participation ▪ Motivation ▪ Recruitment and induction 	<ul style="list-style-type: none"> ▪ Work rosters ▪ Holidays and leave entitlements ▪ Staff meetings ▪ Industrial relations commission award wages ▪ Position descriptions broken down into key responsibilities ▪ Specific tasks ▪ Performance indicators ▪ Personal data ▪ 360 degree feedback ▪ Finance and EFTPOS procedures ▪ Wages ▪ Analysis of wages ▪ When staff started and left.

Four attractions did not have a formal strategic plan, however LM3 and MR2 used a marketing plan to guide their promotion. In the absence of a strategic plan, a marketing plan provided these organisations with targets in terms of visitor numbers, marketing expenditure and environmental monitoring. Clearly a marketing plan provides less emphasis on operational strategies, resource considerations and product development.

Planning Meetings and Idea Generation

A key task in the development and implementation of plans is the need to drive the planning process through collaboration. The prominence of meetings in some attractions led one respondent (LM2) to exclaim: “This place is big on meetings!”. The role of meetings as a means to disseminate information would suggest that the number and frequency of planning meetings held by an attraction is linked with the size of the attraction.

Planning meetings were held at various levels in the attractions interviewed, as shown in *Table 5.9*. Meeting frequency varied but many attractions commonly adopted a monthly meeting schedule. In some instances meetings were held irregularly, or when required.

TABLE 3.6 – Frequency of planning meetings at various organisational levels

Levels of Planning Meetings	Frequency*	Respondents	Count (N=12)
Board of Directors	<i>Monthly</i>	SR1, MR1, LM2, LM3	4
Management	6 Months, <i>monthly</i> , 2 weeks, weekly	SR1, SR2, MR1, LM1, LM2, MM2, LM3, MR3, SR3	9
Departmental	<i>Monthly</i> , 2 months	MM1, LM1, LM2, LM3, MR3	5
Cross-departmental committees	Monthly, 6 weeks, 2 months, 3 months	MM1, LM2	2
General Staff	Weekly, <i>monthly</i> , 3 months	SR2, MR1, LM1, LM2, MM2, MR3	6

* *Italics* indicate the most common frequency for meetings

Planning meetings in attractions appear to serve different purposes. *Management*-level planning meetings were used to *formulate* plans, or to *review* planning decisions and performance. SR1 and MR3 specifically recognised brainstorming and idea generation as important steps in the planning process (*Table 3.2*), with these tasks being undertaken at the management level.

Meetings conducted at the *staff* level typically allowed senior management to *communicate* plans and progress to employees. In the case of SR2, staff attended monthly meetings of 1½ to 2 hours, which allowed management to communicate planning issues at a staff level. The owners/managers usually conducted planning meetings prior to staff meetings to identify and prioritise key issues. For example, customer surveys were analysed and goals were reviewed by management before a summary was presented to staff for comment.

In larger attractions, *departmental* meetings occurred regularly to operationalise formal plans. Two of the larger metropolitan attractions (MM1, LM2) also conducted cross-departmental meetings in order to initiate and plan projects and exhibits. At MM1, cross-departmental committees established to oversee specific exhibitions initially met roughly every 3 weeks, before shifting to weekly meetings as exhibitions approached their launch date. An exhibition concept team met every 3 months while an exhibition development team met monthly. These meetings served the purpose of progressing plans at various levels in the organisation, while allowing staff to be involved in the planning process.

Time devoted to planning tasks

The time devoted to planning tasks is a further measure of the involvement of interviewees in the planning process. When prompted to provide an estimate, many attraction managers indicated that it was difficult to quantify the amount of time spent on planning tasks. *Table 3.7* indicates that four managers were unable to provide an estimate while eight managers estimated a range of values between 5 and 80%.

TABLE 3.7 – Estimates of the amount of time managers spent on planning tasks.

	Attraction Type	Current Role	Time Spent Planning
SR1	Museum	CEO; Director	50%
SR2	Nature-based	Director	75%
SR3	Nature-based	Owner	-
MR3	Agricultural	General Manager	-
MR1	Manufacturing	Tourism Manager	70%
MR2	Aquarium	General Manager	25-50%
LR1	Australian Culture	Deputy Executive Director	-
MM1	Museum	Marketing Manager	70%
MM2	Science / Technology	Director	8%
LM1	Gallery	Head of Public Programs	50%
LM2	Museum	Education & Visitor Services Manager	-
LM3	Aquarium	Marketing Manager	5-80%

A number of variables influenced estimates of the amount of time managers spent on planning tasks, including the management position within the attraction, the time of year, and individual perceptions of what constituted 'planning tasks'. LM3, for example, noted that at certain times of the year 80% of time was spent on planning each week, while at other times only 5-10% of time was used for planning tasks. It was also recognised that a great deal of planning took place at a subconscious level, a point noted by several other managers (SR2, MM2).

It was also difficult for some managers to separate planning activities from administration duties. The manager of SR3 was a board member of the regional tourism organisation as well as being actively involved in a number of tourism-related committees and organisations. These activities were considered to be part of the planning process due to the synergies gained from networking and involvement in local tourism. Time was spent on planning for the attraction whilst also ensuring that strategies were compatible with other tourism businesses in the local area.

From the values presented in *Table 3.7*, it would appear that based on the highest estimates, seven of the twelve managers spent 50% or more of their time on planning tasks. This highlights the importance placed by managers on planning.

Flexibility and Review

While the monitoring of environmental forces and internal performance is important, these tasks are less useful if the attraction is not able to respond to change. Objectives and strategies, therefore, need to be reviewed periodically to ensure that they continue to be relevant. In addition, strategic plans need to be sufficiently broad to allow some flexibility to respond to unexpected events (David, 1997).

Only four attractions (SR2, MR2, LR1, LM3) explicitly stated that plans were reviewed regularly, although it could be inferred that several other attractions reviewed their plans. SR2 frequently reviewed aspects of the plan, such as the analysis of competition and entry fees, however yearly budgets were never altered. Similarly, MM2 noted that:

Planning needs to be tight enough to frame a **budget** but it has to have enough **flexibility** to take into account events that are not visible at the time.

As described earlier, the rolling 5-year plan used by LR1 allows attraction management to review plans every 18 months, thus making the review a central and formal part of the planning process. Events such as the Asian financial crisis in 1998 and the collapse of Ansett Airlines in 2001 often required a departure from original strategies communicated in a business plan. The attraction has changed its strategies on some occasions to account for unexpected events.

The concept of flexibility varied between attractions in the sample. For example, the 2001 drought in Australia prompted managers at MM1 to change their marketing plans by reducing the amount of advertising in regional Australia. At LM3, monthly meetings were also held with the attraction's sales and marketing team to review strategies and plans. Respondent MM2 pointed out that exhibition-based attractions had the flexibility to be more responsive to changes in visitor numbers and key performance measures because unlike more permanent attractions, they had the ability to change and add new components, events or exhibitions relatively quickly.

SR2 placed a great deal of emphasis on flexibility, not just by reviewing strategic plans, but also by developing *contingency plans*. Contingency plans were considered in the design of the attraction's infrastructure and facilities to ensure maximum flexibility. This approach was intended to minimise the effects of business failure by ensuring that the capital investment would generate a return from alternate uses.

In contrast, the Education and Visitor Services Manager at LM2 noted that her attraction's planning process was highly structured and was not very responsive to unexpected changes, either negative or positive. This was partly due to the size of the organisation. Exhibitions at the attraction generally operate on a 6 months lead-time, with tightly planned schedules and it was difficult for plans to be cancelled or extended in response to unpredictable events. It was acknowledged that negative events such as the drought in regional Australia, terrorist attacks and outbreak of diseases such as SARS did impact on the attraction. Likewise the attraction sometimes had to deal with positive developments, such as being offered exhibitions that were outside the organisation's plans.

Planning Inputs

Participants and Information Sources in the Planning Process

Participation in Planning Activities

Question 5: *Who is involved with planning at the attraction?*

Strategic planning commentators frequently espouse the benefits of involving all employees in the organisation in planning efforts. It is argued that this involvement fosters employee empowerment, and creates a sense of ownership of the strategic plan, thus enhancing the prospects of implementation (Hamel, 1996). It is therefore useful to consider the involvement of various organisational players in the development of attraction plans. Table 4.1 summarises the involvement of staff at various levels in the attractions sampled.

The findings indicate that some attractions conduct their planning in a somewhat autocratic fashion, with little consultation with employees. However, a majority of the attraction managers involved employees in their planning efforts. MR2 was clearly unusual in also involving its membership base in the planning process. The attraction had a base of 6000-7000 members who were polled periodically to provide information for the planning process. It is suggested that while other attraction managers did not mention the role of customers in planning, many indirectly consider customer feedback when formulating objectives and strategies.

TABLE 4.1 – Involvement of staff and external stakeholders in planning activities.

Organisational Role	Respondents	Count (n=12)
Board of Directors / Trustees	SR1, MR1, LM2, LR1, LM3	5
Senior Management/Owners	SR1, SR2, MR1, MM1, LM1, LM2, MR2, MM2, LR1, LM3, MR3, SR3	12
General Staff	SR2, MR1, MM1, LM1, LM2, MM2, MR3, SR3	8
Volunteers (where applicable)	SR1, MR2	2
Customers / External	MR2, LM1, MR3, SR3	4

Board of Directors / Trustees

While five managers acknowledged the role of boards in the planning process, three stated unequivocally that board involvement should be minimal. Managers at SR1 stated that the role of the board was to evaluate and provide long term vision, as opposed to being involved in day-to-day operations. At this attraction the board was also involved in brainstorming exercises that provide valuable input for the planning process. LR1 utilised its board in a similar way by involving board members in strategic planning sessions, which included the use of evaluation data, marketing and research.

A particular planning challenge identified by MR1 was the fact that the attraction consisted of a manufacturing unit and tourism unit, with both units effectively competing for resources allocated by the Board of Directors. This was compounded by the view that members of the board were more oriented toward manufacturing and needed to be convinced of the need for attractions to add new components in order to avoid stagnation in visitor numbers. Similarly, the manager of LM3 felt that input from the attraction's board of directors was more negative than positive as a number of board members had little understanding of the tourism industry.

The issue of trustee boards was also raised in relation to public sector attractions. LM2 suggested that staff should be given more say in the election of the board members that effectively govern their organisation. The manager felt that board members should represent the attraction and community rather than being nominated by governments. These views suggest mixed feelings about the involvement of boards in the planning process. While boards are clearly able to offer broad, long-term strategic guidance and governance, the extent of board influence in the planning process was clearly an issue, particularly where there was a perception that the board had a poor understanding of operational procedures in the tourism industry.

Senior Management

Almost without exception senior management were the drivers of the planning process. In the larger attractions, planning initiatives were devised at the senior management level. The creation and dissemination of planning documents was typically the responsibility of upper management (i.e. CEO, executive director, or managing director). Implementation of strategies, however, generally appears to be the responsibility of middle to lower management and supervisory staff. For example, departmental heads in MM1, LR1, LM1, LM2 and LM3 were tasked with disseminating written plans to staff under their supervision, and for devising departmental operational plans that would support longer-term strategies. In this layered process, upper management is concerned with formulating, adjusting and overseeing the attraction's strategies.

In smaller attractions objectives and strategies were both developed and implemented by senior management, simply because the organisational structure and size of these attractions meant that there were few, if any middle to lower management staff. In these attractions senior management worked alongside general staff on a daily basis. The 'authors' of the strategic documents were often also the 'implementers' of strategies. Thus, as might be expected, the 'power distance' between the strategic and operational aspects of planning was greatly reduced in these attractions.

Employees and Volunteers

Ten of the attractions indicated that they included general staff and volunteers in the planning process. While most attractions noted that they had regular staff meetings to communicate developments and plans, there were a variety of views regarding the extent of employee involvement. These views are summarised in *Table 4.2*.

TABLE 4.2 – Involvement of general attraction staff in planning activities

	Attraction Type	No. Paid Staff	Comments
SR1	Museum	2	Staff provide suggestions but don't have the expertise to be involved in planning.
SR2	Nature-based	7	Staff are asked to generate ideas to increase sales three weeks prior to staff meetings. Staff are also required to set monthly personal goals. The goals of staff therefore drive the organisation forward. Management also reward staff with awards. It is intrinsically rewarding for staff to be involved in planning and the manager felt that an autocratic management style was inappropriate. The formal plan is written by the owners/managers but staff provide input and critique planning efforts.
SR3	Nature-based	33	Employees were continually consulted and employee feedback was sometimes used during the planning process.
MR3	Agricultural	48	The manager was enthusiastic about receiving staff input but it was felt that many of the staff are not suitably qualified to provide planning input past a certain level of sophistication.
MR1	Manufacturing	20	Employees were asked for advice and information during the planning process and the manager described planning in the organisation as a "team-effort".
MR2	Aquarium	42	Both full-time and volunteer staff provide information and ideas for the planning process.
LR1	Australian Culture	-	Staff provide input but are not involved in preparing plans.
MM1	Museum	110	At the branch level, staff involvement is facilitated through formal planning meetings and brainstorming sessions. Front office staff also provide important information for planning across the organisation. Plans are distributed to middle managers and it is up to them to determine how widely the information is communicated to staff within their area of responsibility.
MM2	Science / Technology	17	Staff were involved in the operational planning process and the structure was described as " top down, bottom up ". Formal mechanisms, such as staff meetings were in place to solicit advice from staff and the director felt it was rewarding for staff to be involved in the planning process.
LM1	Gallery	190	Employees are encouraged through an open door policy to share information and contribute to the attraction's planning decisions. Involvement in planning at the attraction increases staff morale and empowers staff while still ensuring that individuals stay within their roles.
LM2	Museum	400	Staff involvement occurs through a bottom-up approach, whereby staff views are communicated to managers at departmental meetings. Managers in turn communicate ideas to associate directors who are involved in the strategic planning process. Since the facility is a public sector attraction, planning documents are accessible to staff and the general public. Objectives, performance indicators and developments are formally communicated down to department managers. It is up to department managers to communicate this information to general staff.
LM3	Aquarium	80	The planning process was described as somewhat autocratic because the company had a small core team and it was not necessary to involve everyone in the planning process.

The findings suggest that in most attractions staff provide input for the planning process. This typically involves either formal or informal communication of staff observations and ideas. Staff comments are then integrated into planning documents where appropriate, and strategies are communicated back to management and staff for implementation. Staff are therefore not actively involved in the formulation of objectives and strategies and do not assist in the writing of planning documents.

Some disparities to this general approach are seen at MM1, where staff are formally involved in planning meetings and brainstorming sessions. In this attraction staff are also required to develop personal performance plans and goals. These goals are intended to further the operational objectives of the individual's respective department, which in turn, foster the strategic objectives of the whole organisation. The concept of staff performance

goals is also employed by SR2, where staff are required to set monthly goals which help to drive the organisation forward.

While three attractions recognised that it was rewarding and ‘empowering’ for staff to be involved with the planning process, some attractions also noted many staff did not have a suitable level of expertise to contribute significantly to the planning process. At LM3 general staff were not involved at all in the planning process, while the managers of SR1 and MR3 expressed reservations about the ability of staff to assist in the development of plans. LM1 indicated the need for staff to provide feedback while remaining within their defined functional roles. With regard to small attractions, the CEO of SR1 stated that:

In large organisations where you might have staff who are **professionals** you might seek advice as part of the planning process. In a situation like most small tourist attractions, it is not applicable because **staff don’t have the expertise** to be involved in planning. Staff give suggestions from their own **personal agendas** in terms of making their life easier, rather than what is actually going to benefit the museum as a whole in its development.

A further aspect of staff involvement in planning is the need to communicate plans to staff. While most attractions appear to inform staff of plans and developments in staff meetings, it was noted that in larger attractions such as MM1 and LM2 plans were communicated to departmental managers, who then had the responsibility of disseminating planning information to employees under their supervision. This results in greater organisational distance between the authors and users of organisational plans.

External Assistance

A number of attractions relied on external expertise during the planning process. Managers at MR3 and SR3 did not have a formal management background, and these attractions employed management consultants to assist with the planning process. SR3 outsourced a number of management tasks to an external management group, which was primarily responsible for monitoring performance and writing policies, documents and plans. LM1 was an exhibit-based attraction and input was sought from focus groups and community groups when planning different exhibits. This is similar to MR2, which used its membership base to gather information about various decisions.

Information Sources

Question 6: *Do you look around for information and advice when you are planning for your attraction? Where do you get most of your information from?*

As discussed previously, a number of attraction managers examined environmental forces during the planning process, however the formality and sources of information about trends and patterns varied. This information helps to support planning functions by allowing managers to make informed decisions. Table 4.3 indicates the most common sources of information for managers in the sample. It is reassuring to note that this inductive list of sources closely mirrors the items initially identified in the empirical research presented in the previous chapter.

TABLE 4.3 – Most common sources of information for planning decisions

Source	SR1	SR2	SR3	MR1	MR2	MR3	LR1	MM1	MM2	LM1	LM2	LM3
Own research	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ATC, DMOs, RTAs		✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
Museum / Tourism / industry networks	✓	✓	✓		✓	✓	✓	✓	✓	✓		
Education and scientific institutions			✓				✓	✓		✓	✓	✓
Competitors / collaboration / benchmarking				✓				✓	✓		✓	✓
Consultancies		✓	✓				✓					✓
Government Information	✓									✓		
Best practice / industry leaders		✓								✓		

Own Research

It is evident from the findings that all managers conducted their own research to assist with planning decisions. Further, when prompted to indicate which source of information was most important in assisting planning decisions, all managers identified their own research. However, the extent of this research varied. At a basic level, most attractions collected visitor statistics and information such as complaints and comments from visitors. Visitor statistics typically included visitor numbers, coach numbers, food and merchandise sales, visitor satisfaction and simple demographics, such as the visitor's postcode.

A more sophisticated approach adopted by some attractions (SR2, MR1, MR3) involved the calculation of 'conversion rates' or yield. MR1, for example, does not charge an entry fee and relies on merchandise and food sales for profitability. The cross-referencing of visitor numbers and sales on a daily basis supported operational decisions at the attraction.

As noted previously, MM1 and LM2 have adopted sophisticated formal evaluation procedures by employing evaluation officers. The evaluation officer at MM1 was specifically tasked with "evaluating visitor responses, markets and opportunities". Basic research at this attraction was also supported by visitor exit surveys and major quantitative studies conducted every few years.

Some attractions collected qualitative information through the use of focus groups, or less formal methods such as networking with hotel concierges and coach drivers. The Head of Public Programs at LM1 stated that anecdotal experiences and observations about visitors were valuable. The tourism manager of MR1 noted that she did not devote a great deal of resources to conducting visitor research, preferring instead to rely on employee feedback about visitors. This contrasts sharply with the view from the director of SR2, who noted that staff feedback was often different from the empirical research collected by the attraction. There is also some evidence in the tourism literature that staff feedback about customers is often not an accurate reflection of visitor experiences (Bejou, Edvardsson and Rakowski, 1996).

Tourism Industry Intelligence and Networking

A majority of attraction managers (10) indicated that tourism industry intelligence from organisations such as the Australian Tourist Commission, state marketing organisations and regional tourism associations were important sources of information. While this

information was seen as valuable, a number of managers lamented that it was often dated and inaccurate. MR2 and LM3 expressed concern about the accuracy of visitor arrival figures and noted that trends identified at a national or state level often failed to materialise at a business level. SR2 observed somewhat more candidly that businesses needed to be cautious about using statistics from tourism organisations because it was often too generic and created the potential for distorted expectations.

During the interview process it was also observed that large metropolitan attractions interviewed in Sydney were less perturbed by inconsistencies in visitor data. Given that Sydney is the international gateway to Australia one would expect that visitor demographics would be relatively undiluted, and that ATC data would more closely match the profile of visitors to these attractions. Regional attractions perhaps need to place more emphasis on their own research, which better reflects the visitor idiosyncrasies of more dispersed destinations.

Nine managers also recognised the importance of the tourism and museum industries, which provided information through reports, journals, conferences and networking opportunities. SR3 strongly highlighted the importance of “establishing a **network of knowledgeable people**”. The manager at MR1 noted that while these information sources were useful, there was still a lack of information specifically about tourist attractions.

Competitors, collaboration, benchmarking and best practice

A number of attractions, most notably in metropolitan areas, and within the museum sector, have established cooperative partnerships. These cooperative arrangements allow attractions to share visitor information and research and provide opportunities for benchmarking. A formal cooperative arrangement was not observed amongst regional attractions, although it must be conceded that some attractions informally share visitor statistics, often as a result of networks formed through their regional tourism authority.

Managers at SR2 and MR1 specifically noted that they used comparable overseas attractions as a source of ideas. This form of benchmarking was facilitated by personal travel to ‘best practice’ industry leaders in the United States, and by monitoring Internet sites. At a local level, information about direct competitors was also accessed informally using the Internet. Phillips and Appiah-Adu (1998) found that benchmarking of competitors and customer experiences was a useful tool in the strategic planning process of hotels. Sharing attendance data and participating in joint marketing was also identified as an emerging cooperative trend by Pearce (1998), who argued that this partly offset the trend for large companies to operate a suite of attractions.

Consultancies and Education Institutions

External research-oriented organisations were viewed as a useful information source. Six attractions noted that they had established good relationships with local educational institutions. LR1 and LM3 made use of university students taking part in practicums by developing research projects that produced useful outcomes. A further five attraction managers stated that consultants, or consultancy reports, provided good information for the planning process. Both large and small attractions had employed consultancy firms to conduct periodic market research projects and feasibility studies. LM3 employs a large national consultancy firm to poll 400 locals about the attraction every six months. This research is focussed on the community awareness of the attraction and allows managers to determine the effectiveness of marketing plans.

Importance of Planning

What is the most useful aspect of planning activities?

Six Key Outcomes of Planning

Question 7: *What do you think are the most important or useful parts of your plan?*

Question 7 was intended to provide a summary of the outcomes of the planning process. Summaries of the responses from each attraction are included in *Table 5.1*.

TABLE 5.1 – *Most useful aspects of planning identified by attraction managers.*

	Attraction Type	Comments
SR1	Museum	The most useful outcome of planning is its ability to foster brainstorming activities as well as providing a framework for collecting statistics that allows management to understand what is happening in the attraction and its environment.
SR2	Nature-based	The budget is viewed as the most important outcome of the organisation's planning efforts. An accurate budget and forecasting process is crucial to sustainability and growth.
SR3	Nature-based	A positive outcome of planning is the information produced as part of the planning process (eg. visitor profiles, budgets , marketing figure), particularly with respect to meeting key performance indicators. The ability of planning to increase visitor satisfaction and to maintain infrastructure is also beneficial. Planning has identified and changed the key target market .
MR3	Agricultural	Two key benefits of planning were defined as (1) a better, more attractive product that supported greater customer satisfaction and increased yield , and (2) the ability to identify high yield markets .
MR1	Manufacturing	The usefulness of planning depends on the purpose of the planning process.
MR2	Aquarium	Planning is a means for getting everyone in the organisation to agree . This has a positive impact on staff morale . Another benefit of planning is an increase in visitor numbers , because part of the planning process involves identifying what visitors don't like.
LR1	Australian Culture	One of the most beneficial outcomes of planning is the ability to develop new products . This allows managers to think about the future growth of the attraction and to consider new fields and product opportunities.
MM1	Museum	Marketing plans are the most useful aspect of the planning process. Planning provides a context for guiding day-to-day decisions .
MM2	Science / Technology	The key benefit for staff is the operationalisation of the organisation's broader strategic goals. For the director, the most useful aspect of planning is the identification of strategic domains and priority areas, which provide a benchmark for measuring progress.
LM1	Gallery	Planning provides staff with a unified focus . The planning process also assists in the delegation of tasks and contributes to the development of projects .
LM2	Museum	The most useful aspect of planning involves the development of the organisation's employees and collections .
LM3	Aquarium	The budgeting aspect of planning is most important. The task of setting visitor figures for each month is also a useful part of the planning process. Planning is also simply a useful tool for identifying goals because they " keep you focussed ".

Six key themes about the usefulness of planning emerge from the responses presented above. These are:

- 1) *The collection of visitor statistics.* Four attractions (SR1, SR3, MM2, LM3) found that one of the most useful aspects of planning was its ability to create a framework for collecting and analysing visitor statistics and benchmarking performance. MM2 summarised this theme well when stating that the most useful aspect of planning was its ability to provide “a yard stick whereby we can look at what we are doing and what we may be able to do...and see how it fits in the context of the plan.”
- 2) *Development of new products and markets.* Four attraction managers felt that planning allowed them to identify projects involving new products and target markets (SR3, MR3, LR1, LM1).
- 3) *Improvement of attraction, leading to higher visitor numbers, satisfaction or yield.* Three attractions stated that planning led to increased visitor numbers, satisfaction or yield (SR3, MR3, MR2).
- 4) *Creating a unified focus for the attraction.* LM3 found that the identification of goals during the planning process help to “keep you focussed”. Similarly, other managers expressed the following views:

“It is very important to focus on who you are doing it for... you have to make sure that you are soundly **focussed**”. (LM1)

“You can get **everyone to agree** on ‘this is what we want to do, this is how we are going to do it and this is how we are going to measure whether we succeed or not’.” (MR2)

The development of goals and strategies for the attraction created unity and a sense of direction. This is consistent with earlier comments regarding the creation of identity and vision.

- 5) *Supporting budgeting, marketing and human resource functions.* Less commonly identified outcomes of planning included the support of budgeting (SR2, SR3, LM3), marketing (MM1) and human resource (MR2, LM2) functions. The manager of MR2 found that planning resulted in higher employee morale, while LM2 stated that planning helped the organisation to develop its employees.
- 6) *Providing a context for operational decisions.* The ability for planning to provide a context for making ‘day-to-day’ or operational decisions was also noted (MM1, MM2).

Planning and Attraction Size

The links between business size and the extent of planning.

Large Attractions vs Small Attractions

Question 8: *A common thread in the research we have been doing is the fact that larger attractions are much more likely to plan. What are your thoughts on this?*

A consistent pattern between attraction size and planning was observed. Larger attractions (i.e. MM1, LR1, LM1, LM2 and LM3) typically developed a complex layered planning process. This process involved the formulation of 3-5 year objectives and strategies for the whole organisation. Below this level, individual departments within the attraction developed shorter-term operational plans to support the organisation's strategies. In some of the exhibit-based attractions a further layer included cross-departmental exhibition plans. In smaller attractions strategic planning and operational aspects appear to be much more closely linked. In some cases the key strategic planning documents prepared and used by the attraction were distinctly operational in nature (e.g. MR1, MR2, MR3). The use of procedures manuals by SR1 and SR2, represents a trade-off between a pure strategic document and an operational plan.

The difference between 'serendipitous' or 'accidental attractions' and 'premeditated attractions' has already been briefly discussed. A related issue, identified in earlier research, is the link between attraction size and planning. Question 8 was therefore formulated in an attempt to determine whether small attractions develop into larger attractions as a result of formal and deliberate planning efforts, or whether planning becomes a necessity once an attraction begins to attain a certain size. The responses were varied, but several managers provided some intriguing answers.

While some managers (i.e. SR3, LM3) felt that there was no clear answer on the issue some clearly felt that **planning produced growth**:

Success stems from planning...you cannot succeed if you don't plan. Planning allows an organisation to control the outcomes more efficiently and allows management to stabilise variables in order to achieve goals (LM1).

Organisations of every size need to plan. I think smaller organisations actually need to plan more because they have fewer resources and need to operate in an efficient manner (LM2).

Only through planning. It doesn't just happen because you're lucky. You don't just grow because you're lucky. Someone's planned, had an idea, and brought that to fruition. Tourism is too hard to just hit it on the head and say: 'they will come'. They never come, you've got to try to get them (MR3).

LM1 noted that the need for planning varied according to the **nature** of the attraction. As an example, it was suggested that planning in natural attractions probably occurred later in the organisation's development than in highly structured, built attractions. This is a view shared by MR1. The Deputy Executive Director of LR1 adds further detail to this notion by elaborating on the contrast between 'accidental' private attractions and planned government attractions:

Government attractions are often opposite to this development model. A team of thousands of consultants will want to **definitively plan** to the nth degree before developing a product, and then it is not accepted in the market place. In tourism...a lot of tourism product has to grow **spontaneously** to give it energy - an individual's passion or desire to see something that has always been in the back of their mind as being worth developing. The government sector will kill things with planning and don't see that the product had to be there in the first place.

The Director of SR2 felt that planning in larger attractions was driven by finance:

Planning comes about because it is a prerequisite for accessing money – both private and banking.

Larger attractions are planned because this formality is required to secure investment or government funding to construct these attractions. In contrast 'accidental' attractions develop gradually, often with no external investment and with little formal planning at the initial stages.

These observations should be considered against the backdrop of organisational life cycles. LM2, for example, is one of the largest attractions in Australia and is likely to be at a mature stage of development. Similarly LM1, LM2 are substantial attractions with an ingrained culture of planning. The views of the Deputy Executive Director at LR1 are interesting because the history of this attraction suggests that it originated as a small, albeit well planned, regional attraction.

In contrast to the views that planning is a necessity for attractions of all sizes, and that planning is required for growth, a second group of attractions felt that planning **evolves** as attractions grow. One interviewee (MM1) suggested that planning was evolutionary, and became more formalised in an organisation as issues became more apparent. The manager used the analogy of turning a ship around – a plan is needed to give direction to an organisation.

A series of more pragmatic responses to the issue of attraction growth and planning are provided by the following remarks:

In a **small attraction** it is usually adequate for the plan to be in someone's **head**. Plans are written down because it becomes necessary to communicate the direction of the organisation to other people. In a **larger** organisation it is not reliable for the plan to simply be in someone's head. The planner would end up with too much information in their head. It is not clear what the break point is, or where planning starts to pick up in terms of growing the business. (MR2)

If you were a **sole operator** planning is taking place in your **mind** and you know where you want to go. There is less pressure to put the plan on paper as a small operator than there is as a big operator. Once you get 3-4 people involved then you've got to start sharing that. You can still do that around the lunch table but **there comes a point where you have to put things in writing**. It is at that point that you clarify what it is that you are trying to achieve and how you go about doing that. (MM2)

The Director of SR1 stated that one of the difficulties in smaller attractions was the inability to fund sufficient paid staff to plan. He felt that smaller attractions needed at least one permanent employee to provide continuity and to encourage a longer-term view. Similar to MR2 and MM2, there was a strong belief that once a small attraction employs paid staff it becomes necessary for the attraction to be self-sustaining. Planning becomes necessary as a means of justifying the role and performance of the organisation.

SR1 believes that the change in attitude in favour of planning occurs when attraction owners realise that planning is necessary to maintain performance and income. Likewise, the tourism manager of MR1 suggested that as attractions grow they experience greater overheads and therefore need to be more mindful of costs. Mistakes and bad decisions have the potential to be more costly and this creates a need to research and plan.

In summary, the two core views are not totally disparate, and offer some answers to the "chicken and egg" relationship between planning and organisational growth. It should now be evident that attraction growth and planning are so intertwined that both views may be accurate for different types of attractions. Consequently, some attractions (large and small) are subjected to sophisticated formal planning approaches when they are conceptualised, and planning therefore becomes entrenched in the organisation's psyche. On the other hand, some attractions evolve accidentally and the sophistication of planning increases as the financial stakes rise.

There is some scope for these opposing attraction development models to be viewed along a continuum, since some attractions exhibit neither a highly formal planning character, nor a complete absence of planning. There are certainly small to medium attractions in Australia that were conceptualised by owners and managers with a high degree of foresight.

The Future of Australian Tourist Attractions

Views about future issues and challenges.

Key Themes

Question 9: *I imagine that during the planning process you would have given some thought to the future of your attraction and to the tourism industry in general. Would you like to share some of your thoughts about this future with me?*

Question 10: *How do you think attractions, and the way they are managed, will change in the next 20 years?*

Some managers chose to speak philosophically about the future of the tourism industry, while others related their answers specifically to their own attraction and the region in which it was embedded. A useful framework for summarising manager perceptions about the macro-environment is the STEEP framework. This framework allows for an analysis of the future in terms of *Socio-cultural*, *Technology*, *Economic*, *Environmental* and *Political* changes. In addition, the micro-environment is examined here by considering the *Tourism Industry* changes and *Market Trends* identified by managers. The results are presented in *Table 6.1*.

An examination of responses indicates that opinions varied widely. Most managers had some difficulty in initially formulating a response to the question, despite having received the questions several months prior to the interview. This highlights the challenges managers face in considering the complex and uncertain nature of the future.

Socio-cultural changes

The managers of SR1 and MR1 both indicated that increased leisure time would create new opportunities for attractions. The CEO of SR1 suggested that leisure activities that don't require much money and are within a convenient distance of travel would become important. LM1, a large metropolitan attraction, noted the increasing influence of Asian culture in Australia, and believed that Australia would continue to become more multi-cultural. The interviewee also expressed a need for greater interaction with the Asia Pacific region. At pragmatic level, this means that attractions need to deliver features that appeal to Asian audiences.

TABLE 6.1 – Themes of attraction manager perceptions of the future.

Key Future Themes	Respondents	Count
<i>Socio-cultural change</i>		
Increased leisure time	SR1, MR1	2
More multi-cultural / Asian society	LM1	1
People living longer	MM2	1
<i>Technological change</i>		
Online technologies	SR1, LM1, LM2, MM2, MR2	5
Technology and human interaction	SR1, MR3	2
Multi-media / multi-faceted exhibitions	LM1	1
Use of technology to measure and track visitors	MM1	1
<i>Economic change</i>		
Greater disposable income	MM2	1
<i>Environmental change</i>		
Manage impacts, biodiversity, natural assets	SR3, MR2	2
“Green factor” / natural attractions valued	LR1, MR2	2
<i>Political change</i>		
Government allocation of funding	SR1, SR2, LM2	3
Public liability insurance	LR1, SR2	2
Censorship	LM1	1
<i>Attraction trends</i>		
More professional management	SR1, SR2, MR1, MM1, LM1, MM2, MR3, SR3	8
Theming of attractions	SR1, LM2, LR1	3
More meaningful, immersive, engaging experiences	LM1, LR1, LM3	3
Need for cooperation / communication	MR2, SR3	2
More flexible staff structures and employment conditions	LM1, LM2	2
Simplistic attractions with mood and ambience	MR1	1
More stringent standards / accreditation	SR1	1
Takeovers, consolidation and amalgamation of attractions	LM3	1
<i>Market trends</i>		
More travel, shorter holidays	MR1, LR1	2
Visitors more sophisticated and demanding	MR2	1
Appetite for learning / life-long learning	MM2	1
Continued presence of international market	LR1	1
High-yield international visitors to regional Australia	MR3	1

Technological change

There was considerable concern from some attraction managers, notably in the museum sector, that the Internet had the potential to disrupt the operations of attractions. Managers at SR1 and LM2 were dismayed that members of the younger generation were increasingly staying at home to entertain themselves rather than seeking interactive activities. In response to this trend, SR1 indicated a need for attractions to increase their interface with the public through interactive displays, such as the creation of ‘living history’. Similarly, LM2 stated that museums would have to play a role in making sure that the younger generation understood that a real visit to an attraction could be supplemented by an online visit. There was a feeling that museums provided more opportunities for interaction with “real people and real objects”. The key question for museums was neatly summarised by MM2:

How do we use the web...in a way that gets the message out to as broad an audience as we can, raises their curiosity but does not satisfy a majority of people until they have actually visited the attraction?

A related concern was that attractions would need to make a trade off between technology and human interaction at the attraction itself (SR1, MR3). While the attraction could connect with visitors through the application of technology (such as the use of holograms), it was suggested that interaction with real people was also needed to provide visitors with an incentive to visit attractions. "People want people because it's part of our human culture (SR1)." Individual attractions would need to strike a balance between the use of cutting-edge interpretive technologies and personal interaction.

LM1 presented a view that contrasts with the general apprehension about technology. The manager at this attraction felt that attractions such as museums and art galleries were well placed for the information age, because these institutions were repositories of information-rich collections. He also predicted that while galleries and museums would continue to provide an escape for some segments of the market, they would also increasingly move toward multi-media / multifaceted exhibitions to engage the audience. The manager of MM1 envisaged another use of technology in attractions, stating that technological developments such as the use of smart cards could provide attractions with an opportunity to more accurately measure and track visitors.

Economic change

Economic variables did not feature prominently in conversations about the future of tourist attractions, however, MM2 did connect increased life expectancy with greater **disposable income** as two key demographic trends that would influence tourist attractions.

Environmental change

Two attractions, notably in regional Australia, mentioned that the nation's bio-diversity and natural assets provided enormous scope for nature-based tourism. The manager at LR1 believed that Australia's icons, the reef, the rock and Sydney would continue to be significant drivers but that the South Eastern parts of Australia would include a 'green factor'. Eco-products in Tasmania and Victoria were cited as examples. There was a strong recognition from SR3 and MR2 that the community would expect the nation's natural assets to be managed in a sustainable manner.

Political change

The role of government in the tourism industry continues to be a contentious issue for tourist attractions. SR2 and LM2 both expressed a belief that government funding for tourism projects was an important future issue. SR2 expressed concern about the allocation of funding to regional projects such as the *Heritage Trails* network. There was a feeling that the current funding models created some future structural problems for the attraction sector because they provided funding for the development of attractions but failed to fund ongoing maintenance. A residual impact was the dispersal of visitor numbers, causing some commercial attractions to receive fewer visitors. It was suggested that a better funding model might involve commercial attractions competing for a pooled government funding source. The manager of LM2 was more concerned that government

funding of public attractions would decrease, and that these attractions would need to become increasingly self-sufficient. This point was also raised by SR1.

Public liability insurance was noted as a problematic issue in the immediate future (SR2, LR1) while the manager of a prominent art gallery (LM1) was concerned about government censorship. The manager of LM1 that art galleries should provide a “safe environment for displaying unsafe ideas”. These points, however, are somewhat short-term and of less interest in the context of a 20-year time frame.

Attraction Trends

Many of the managers in the sample focussed on specific attraction sector trends that had the potential to influence tourist attractions in the next 20 years. The most common theme identified by managers was that attraction management would become more **professional**. Various reasons were provided to support this view. The director of SR2 stated that better educated managers, and an increased awareness of computerisation and software would improve professionalism within the industry. The manager at MR1 believed that the increasing costs and complexity of doing business would result in more professional attraction managers. MM2 suggested that more demanding clientele would lead to more professional approaches in attraction management. According to MM1, increased professionalism would create a greater reliance on research and information, and managers would need skills in conducting and interpreting research accurately.

Several attractions were also apprehensive about increased professionalism in the attraction sector. SR1 was concerned that smaller attractions may lose some of their character as their operations became increasingly dominated by regulation and financial control.

People create a space or energy or feel about an organisation because of their own experience so if you look at a museum or attraction and put it into the hands of someone who's focus is money and finance, then it changes the dynamic quality of the attraction. (SR1)

For some attractions the value is in the uniqueness of the experience and part of that has to do with the eccentric nature of the operator. The Crocodile Hunter is very, very smart, but also very, very eccentric and that's part of the attraction. Particularly out West there are a lot of attractions where the greater proportion of the attraction is the eccentricity of the owner/operator. (MM2)

While these concerns are valid, several managers also noted that there would always be ‘mum and dad’ attractions (SR2, MR3).

Continuing with the theme of increased professionalism, the director of SR1 predicted that attractions would need to operate under more stringent standards and accreditation requirements. Accreditation would become increasingly necessary for organisations needing to attract public funding. Higher standards would in turn create a need for more professional management. It was envisaged that accreditation requirements would make the environment tougher for small museums and attractions.

Table 6.1 indicates that the prevalence of **themed attractions**, and specifically the popularity of theme parks was identified as a trend by three museum managers. This is consistent with observations by Tourism News South Wales (1999). The CEO of SR1 felt

that in order to compete with other entertainment options, theme parks were increasingly becoming an acceptable face for museums. In sharp contrast, the manager of LM2 stated:

In trying to get the audience in we must never lose the **integrity**. We should not turn into a **theme park** in trying to attract audience

At LR1, an attraction that could arguably be described as a museum or a theme park, the manager suggested that theme parks were one style of tourism providing people with experiences, but that other approaches had become equally important. For example, dining and cultural aspects such as sports tourism were increasingly popular attractants for visitors who then took part in secondary activities while at the destination.

Some managers felt a growing sense of urgency to connect with visitors by offering meaningful, immersive and engaging experiences (LM1, LR1, LM3). This issue is related to the challenge of balancing the use of cutting-edge interpretive technologies and personal interaction. It is also linked with the need to satisfy more sophisticated and demanding visitors, as identified by MR2. Competition from other activities such as the Internet, computer games, arcades and theme parks is becoming more sophisticated. As a result customers continue to increase in sophistication. The marketing manager of LM3 perhaps highlighted the issue most clearly:

Visitors will be seeking a more **interactive, hands-on experience**. The days of a passive experience are fading.

Unfortunately a dilemma for this large attraction was that it faced capacity problems because it was receiving too many visitors to provide a truly interactive experience. A slightly different opinion was offered by the tourism manager at MR1, who felt that attraction infrastructure needed to be “more simplistic, creating mood and ambience”.

The need for greater cooperation was identified by MR2, who stated that visitor facilities needed to understand that they were working together and any destructive competition needed to be left behind. Similarly, SR3 recognised a need for greater communication between local communities, tourism operators and CRC's to work on “big picture” issues, such as managing visitor impacts.

Another less prominent theme identified by managers was the management of **employees**. LM1 and LM2 both envisaged a need for greater flexibility for staff. LM1 felt that more flexible staff structures and employment conditions would allow managers to respond to constraints and external conditions. On a slightly different tangent, LM2 discussed the role of technology in changing work processes. Technology now allows individuals to work from home and attractions needed to take advantage of these opportunities to create flexibility for staff as well as the organisation. An extension of staff flexibility was the need for staff to become more multi-skilled.

The marketing manager at LM3 raised an intriguing trend also identified in some of the tourism literature: a shift toward the consolidation of the attraction sector. The manager felt that there would be a lot of take-overs in the attraction sector in the next 20 years. Dominant tourism-based companies will acquire small attractions and will apply a broad-based management approach. LM3 reasoned that:

If there are a number of attractions or products in your portfolio your management structure can be a lot leaner. For example, you would have one salesman selling 10 products instead of ten salesmen selling one product.

She explained that examples of this trend were already evident in other sectors of the tourism industry, such as hotels, cruise companies and theme parks.

Market Trends

Two managers (MR1, LR1) highlighted that demographic changes resulted in more travel and shorter holidays. By example, LR1 stated that:

There is a trend towards **shorter-term experiential**-based holidays. In three days people want to do 2-3 really good things...a unique and enjoyable experience...Packaged products with mini experiences are what we are moving to.

Embedded in this view is the need for attractions to work together to create experiences for visitors, as discussed earlier.

It was somewhat surprising that only one attraction (MM2) was preoccupied with the role of attractions as facilitators of life-long learning. While this issue is allied with a need for attractions to provide more interactive experiences, it is a subtly different concept. The implications of life-long learning means that attractions are uniquely placed to satisfy the curiosity people have about the world:

Tourist attractions, by their nature, are educational experiences., whether they have a natural or historic basis. People go to attractions to be educated, to be awe-struck and because other people have gone. The future looks bright, particularly if you add value to it. (MM2)

When prompted to discuss the future of attractions, both LR1 and MR3 recognised the continuing influence of the international market on Australian attractions. MR3 observed that within the attraction's local area many coastal towns were experiencing a massive "Noosa-like" re-invention. Boutique towns were becoming accessible to tourism and a number of resort and marina developments were being planned. Quality accommodation in coastal towns had the potential to attract a larger share of high yield international visitors to regional Australia.

Conclusions

The findings provide a better understanding of planning issues at the business level of tourist attractions. The findings supported other research indicating that larger attractions had more elaborate planning systems than smaller attractions. However, the findings of this study provided a better understanding of the reasons behind this observation. Larger attractions typically developed a complex layered planning process. The writing of a formal plan also appeared to be associated with larger attractions, particularly those in metropolitan locations. In smaller attractions strategic planning and operational aspects appear to be much more closely linked. The findings also confirmed that most attractions do undertake common planning tasks such as setting objectives, developing strategies, determining key performance indicators, monitoring the environment and evaluating business performance. The monitoring of performance was viewed as being particularly crucial for tourist attractions, both as a planning function and a useful by-product of the planning process.

The study made an important distinction between serendipitous attractions and premeditated attractions. This distinction helps to partially explain some of the differences in planning approaches encountered in attractions. An early puzzle in previous research was the need to determine whether small attractions develop into larger attractions as a result of formal and deliberate planning efforts; or whether planning became a necessity once an attraction reached a certain size. This qualitative study appears to suggest that attraction growth and planning are so intertwined that both statements may be correct. Some attractions are subjected to sophisticated planning processes at the outset, while some attractions evolve accidentally and planning becomes more sophisticated as the financial stakes rise.

The last part of this report was concerned with the views of attraction managers regarding the future of Australian tourist attractions. The findings showed that management opinions varied considerably, with a large number of disparate comments and (in some cases) elaborate visions. However, there was a reasonably strong notion that the attraction sector would become more professional in the next 20 years.

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