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# Cultural Tourism in Australia

Characteristics  
and motivations

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# Foreword

Cultural tourism is attracting considerable attention worldwide. As an increasing number of travellers seek destinations which offer distinctive cultural experiences, managers, marketers, policy makers and planners need to build their knowledge of this market segment.

Understanding the characteristics of the cultural tourism market, including travellers' motivations and travel behaviour is fundamental. To this end, the then Department of Communications and the Arts commissioned the Bureau of Tourism Research to undertake a series of studies on motivations of visitors participating in cultural activities.

This report brings together broad ranging discussion to form an operational definition of cultural tourism and analyses primary data on this segment, collected through a survey supplementary to the International Visitor Survey (IVS) conducted by the Bureau of Tourism Research. The IVS is an invaluable vehicle for collecting information at this detailed level.

The paper aims to contribute to a fuller understanding of this important growth segment within Australia's inbound tourism market.

Peter Robins  
Director  
Bureau of Tourism Research

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# Glossary of acronyms

ABS	Australian Bureau of Statistics
BTR	Bureau of Tourism Research
DOCA	Department of Communications and the Arts
IVS	International Visitor Survey
UK	United Kingdom
USA	United States of America
VFR	Visiting friends and relatives
WTO	World Tourism Organisation

# Summary

Australia is increasingly being recognised as an exciting, unique, diverse, and sophisticated tourist destination which has much to interest visitors beyond its world-renowned natural attractions. Australia has a wide range of cultural assets including museums, art galleries, historic and indigenous sites, performing arts and live concerts designed to enrich, educate and entertain visitors.

Many tourists are keen to learn about and experience the culture of the places they visit. Some plan attendance at cultural events, others seek to meet the local people. Understanding the phenomenon of cultural tourism is increasingly necessary as more and more tourists seek authentic, high quality, interactive tourism experiences.

Australia is only one of many destinations worldwide which offer cultural experiences. It is therefore important to understand what motivates people to seek cultural experiences and, in particular, what aspects of Australian culture overseas tourists are attracted to. By understanding this, planners and policy makers can make informed decisions in the management of Australia's cultural resources.

An essential requirement for research into cultural tourism is an agreed definition. The term 'cultural tourism' has been defined in different ways depending on the purpose in question. Some definitions attempt to focus on travellers' experiences, goals or activities. In contrast, where the need is to measure visits to cultural attractions, narrower definitions are generally employed.

For the purpose of this paper, cultural tourism is defined in terms of inbound visitors' attendances at a range of cultural attractions in Australia including: historic or heritage buildings, sites or monuments; Aboriginal sites and cultural displays; art or craft workshops or studios; festivals or fairs; performing arts or concerts; and museums or art galleries. This reflects data collected through the *International Visitor Survey* conducted by the Bureau of Tourism Research. Specifically, a cultural visitor is defined as an inbound visitor who attends at least one of the above cultural attractions during his or her stay in Australia.

The study of tourist motivation is one of the most complex areas of tourism research. In short, there are a combination of factors that lead people to travel. These include the individual's own needs and wants – push factors – and destination specific features – pull factors. The opportunity to experience culture may be either a primary or a lesser motivation. Although the factors influencing visitors' decisions are not mutually exclusive, the importance attached to each motivator can be used to determine whether a cultural visitor is a 'specific' or 'general' cultural visitor. Studies show that a majority of inbound visitors are 'general' cultural visitors, that is, they seek cultural experiences as part of their travel itinerary, rather than as their main reason for travel.

During the survey period visitors to cultural attractions represented approximately 60 per cent of all visitors to Australia. Forty five per cent of international visitors to cultural attractions in Australia were from Asia, 27 per cent from Europe, 15 per cent from New Zealand and 10 per cent from North America. While visitors from Asia made up the largest group of visitors to cultural attractions, a higher proportion of visitors from Europe and North America undertook cultural activities while in Australia.

Compared with the average international visitor, inbound visitors to cultural attractions tend to be younger, are more likely to be on holiday, stay longer and have higher expenditure. A visit to a cultural attraction in Australia is often made on impulse, with little or no planning made in advance. What has emerged from this study is the importance of networks in obtaining up-to-date information on cultural events and attractions. While more than one in three inbound visitors to cultural attractions obtained information from travel agents or travel brochures, a similarly high proportion sought information through their own networks of family, friends and business or study colleagues.

For many, cultural sites and performances provided an opportunity to experience something Australian, new or educational during their stay. For some, a visit to a cultural attraction was made as a component of a package tour or because of a specific desire to visit a certain attraction.

Throughout this paper a number of opportunities have been identified where there is potential for the cultural industry to broaden its participation in inbound tourism. For example, it has been noted that while business visitors make up a small proportion of international visitors to Australia, and an even smaller proportion of international visitors who seek cultural experiences during their stay, those who do have the opportunity to take time from their schedule to visit cultural attractions or participate in cultural activities have their interest in Australian culture aroused significantly. The challenge is for the cultural industry to meet the needs of this group thereby stimulating their interest and possible future visits to cultural attractions.

A number of research needs have also been identified throughout this paper. In the interests of marketers and planners it is necessary to understand the timing of visitors' planning. Although this study examined whether inbound visitors to cultural attractions planned their visit to the attraction or not, it did not determine 'when' this occurred. It is not possible therefore to know whether visitors sought information on cultural attractions before they travelled to Australia or following their arrival in the country, or both.

It is also desirable to build from this study and others by examining the degree of importance visitors place on certain motivations. This study sought information on the motivations that led inbound visitors to seek cultural experiences in Australia but did not expressly ask respondents to rate or rank their motivations according to the level of importance they

place on them. In an attempt to explore differences between inbound visitors to cultural attractions, respondents were divided into those who indicated that they had a special desire to experience culture in Australia and those who displayed what was termed a 'general' interest. This analysis pointed to the importance of word of mouth recommendations from social networks in influencing visitors' decisions to seek cultural experiences. It was found that visitors from New Zealand were the national group most likely to have formed a specific interest in visiting a particular site or event. A similar tendency applied to visitors who were in Australia for longer periods of time or visiting their friends and relatives. It is evident that these visitors have the time or connections to learn what is available in Australia.

The results of this study also revealed the economic significance of the cultural industry to tourism. On average, visitors who went to cultural attractions spent more in Australia than did other inbound visitors. Further, as 28 per cent of those surveyed (or 17 per cent of all inbound visitors to Australia) had formed a specific desire to visit a particular cultural attraction during their stay it could be argued, that had these opportunities not been available, some of these visitors may have chosen to visit other countries that better satisfy their travel goals.

# 1 Introduction

Like ecotourism and adventure tourism, cultural tourism is attracting worldwide interest. Indeed, its popularity has been acknowledged over the last 10 years or so, and interest in cultural tourism appears likely to continue. Cultural tourism's importance to the Australian tourism industry is already substantial. In 1996 more than 2 million or approximately one in two international visitors to Australia sought at least one cultural experience during their stay.

Australia has a unique culture with a range of assets that enrich, educate and entertain its visitors. It is however, only one of many destinations worldwide with cultural tourism potential from which travellers can choose. For this reason it is important to understand what motivates people to seek cultural experiences and, in particular, what aspects of Australian culture are attractive to overseas visitors.

To this end, the then Commonwealth Department of Communications and the Arts (DOCA) (now the Department of Communications, Information Technology and the Arts) commissioned the Bureau of Tourism Research (BTR) to undertake a series of studies funded through DOCA's Cultural Development Program.

The three studies aimed to:

- collect and analyse data on shopping patterns and expenditure of inbound visitors on cultural products, in particular visual arts and crafts;
- collect and analyse reputable secondary source data to explore the motivations and attitudes of inbound visitors towards Australia's cultural attractions, events and other products; and
- collect and analyse data on inbound visitors' attitudes and motivations relating to cultural activities and events.

The research presented in this report represents the results of the last two of these studies. Research regarding the first component was published by DOCA in *Cultural Tourism in Australia: Visual art & craft shopping by inbound visitors*.

## 1.1 Outline

Within the tourism literature there is no consensus on a single definition of cultural tourism. A discussion is entered into in this chapter on the difficulties involved in arriving at an appropriate definition. The definition to be used throughout the remainder of the paper is established, as a definition in clear, quantitative terms is important in order to develop a statistical basis for policy development, planning and marketing.

Chapter 2 explores relevant literature, including theories on tourists' motivations to

travel, particularly the factors leading tourists to participate in cultural activities. Studies of visitors' motivations regarding participation in Australia's cultural attractions and events are also examined.

Chapter 3 sets the scene for cultural experiences in Australia through a discussion of Australia's cultural resources, both physical and human and Chapter 4 follows with a description of the methodology applied to collect the data for the purposes of this study.

Information from a survey supplementary to the International Visitor Survey (IVS) is then analysed in detail. This supplementary survey focuses specifically on cultural tourism. Chapter 5 concentrates on the characteristics of inbound visitors to cultural attractions and draws comparisons, where appropriate, with visitors who do not seek cultural experiences in Australia. Demographic data are drawn from the core IVS data items to form a profile of cultural visitors. Characteristics described include visitors' country or region of residence, main purpose of visit, age, gender, and occupation.

Chapter 6 analyses the factors that influence overseas visitors' decisions to participate in cultural activities and leads to Chapter 7 which includes an examination of the information collection and planning processes involved in converting an interest in a cultural attraction or event into actual attendance. Satisfaction of inbound visitors is explored in Chapter 8 through a review of their interest levels prior to and after participating in cultural activities and their willingness to engage in cultural activities in the future.

Recognising that cultural visitors constitute a large group and in fact make up a majority of all inbound visitors to Australia, it is beneficial to explore differences within this segment. Chapter 9 begins to do this by exploring differences in cultural tourists according to their motivation. A summary of the main findings from the supplementary survey is provided in Chapter 10.

## **1.2 Defining cultural tourism**

In order to provide a profile of the cultural tourism market it is necessary to establish a definition that is valid and operational. Varying definitions of cultural tourism have been proposed by researchers reflecting the diverse goals of studies related to this field. In general, definitions have centred on visitor experiences, activities or goals. For example, Richards (1996) focused on the intellectual, spiritual and aesthetic needs of the visitor while Hughes (1996) suggested that a typology of cultural tourism could be built on a matrix of cultural intent – primary, incidental, or accidental; and the nature of cultural interest – specific or non-specific.

Some definitions however reach so far as to include the movement of all persons as “they satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters” (WTO, 1985, p. 6).

Defining cultural tourism becomes more complex by the fact that cultural tourism is generally held to comprise various forms of tourism, such as heritage tourism, historical tourism and ethnic tourism. Heritage tourism can be described as an encounter with or an experience of being part of the history of a place through visiting historic sites, monuments, and landscapes. Heritage tourism tends to focus on learning and includes the experience of local traditions, social customs, religious practices and cultural celebrations (Zeppel and Hall 1992). Historical tourism is a form of heritage tourism: its main focus is to stress the experiences of the past. Ethnic tourism entails some form of first-hand, face-to-face experience with local people, either by visiting their land or observing or participating in local customs, rituals and other traditional activities (Harron and Weiler 1992).

Unfortunately most definitions of cultural tourism have been too broad to be useful as a basis for statistical collection (examples of the diversity of existing definitions of cultural tourism are at Appendix A). For the purposes of this study therefore an operational definition of cultural tourism was derived through the definition of tourism itself. The United Nations and the World Tourism Organisation define tourism as comprising:

the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

(WTO, 1994, p. 5)

If tourism, as a whole, is defined according to the activities of visitors, it follows that cultural tourism can be defined according to the cultural activities of visitors.

The United Nations and World Tourism Organisation define a visitor as:

any person travelling to a place other than that of his/her usual environment for less than twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

(WTO, 1994, p. 7)

The question remaining, therefore, is what makes an activity ‘cultural’ or, to rephrase, when are visitors participating in cultural activities? Events and attractions which provide visitors with an opportunity to experience particular lifestyles and practices, or to view works of artistic expression are often held to be cultural in nature. However, precisely what constitutes a cultural experience is open to interpretation. For example, live entertainments (such as comedy, magic, pop concerts, folk music and circuses) are not generally considered to be part of cultural tourism because they are not “the works and practices of intellectual,

spiritual and aesthetic development” (Williams, cited in Hughes 1996, p. 708). However, to many visitors and service providers, live entertainment plays an important role in the demonstration of culture (Hughes 1996).

To overcome these obstacles the Department of Communications and the Arts, which commissioned this study, suggests that cultural tourism be defined in terms of visitors’ activities. This is consistent with the practice of the World Tourism Organisation as previously mentioned. Cultural tourism therefore is defined according to visitors’ attendance at:

- festivals or fairs (music, dance, comedy, visual arts, multi-arts and heritage);
- performing arts or concerts (theatre, opera, ballet, and classical and contemporary music);
- museums or art galleries;
- historic or heritage buildings, sites, monuments;
- art or craft workshops or studios; and
- Aboriginal sites and cultural displays.

This approach to defining cultural tourism focuses on actual behaviour and has the advantage of being made operational through existing or additional data, which can be readily collected. It relates closely to data collected in the Bureau of Tourism Research’s IVS. While the behaviour may have been triggered by social, psychological or other motivating factors, such factors are difficult to measure through existing data sources.

For the purpose of this paper, therefore, cultural visitors are defined as inbound visitors who attend at least one of the cultural attractions listed above during their visit to Australia.

This definition is compatible with the concepts and definitions of both the National Culture-Leisure Industry Statistical Framework and the Framework for the Collection and Publication of Tourism Statistics (ABS, undated; ABS, 1997c).

## 2 Background

Cultural tourism is tourism that focuses on a destination's culture – the lifestyle, heritage, arts industries and leisure pursuits of the local population. As inquisitive beings, humans have long been interested in the pursuits of others. Pearce (1982) notes that as far back as the time of the Roman Empire people sought souvenirs from distant places. Through time this interest has evolved. With the decline of the Roman Empire attitudes towards leisure travel changed. In the 1300s people began to travel again – this time with a purpose (Dickman, 1989). Pilgrimages were made to places of religious significance. Trips were not necessarily pleasurable but designed to benefit, at least spiritually, the individual (Pearce, 1982).

People have continued to travel in search of education and individual development. In the Elizabethan era of the late 16<sup>th</sup> century wealthy young gentlemen would travel to the European continent on what became known as 'The Grand Tour'.

The young man would visit the museums, learn languages, and acquire some of the finer skills, such as painting and music.

(Dickman, 1989, p. 7)

Political and technological developments since then have led to the acceptance of travel for reasons other than religion or education (for a concise history of developments see Pearce, 1982). People continue to travel to experience and learn about different cultures. However, today's 'Grand Tourists' need no longer be members of a social elite.

Although the objectives of travel are as diverse as people are numerous it can be argued that, given the nature of travel, most tourism remains 'cultural'. As people travel from one place to another they will usually be involved in some way with aspects of the 'other' culture. Pearce points to this when he states that cultural tourism "is concerned with the social and physical structures of the past and present and in its broadest sense may be taken to mean everything about a place and its people" (Pearce, 1988, p. 114).

Most people do not, however, travel with the pursuit of culture as their sole motive, but participate in cultural activities as a component of their travel itinerary or if opportunities arise. Although culture may not be the only, or even main, reason for travel, it is seen as a "powerful factor in selecting one destination over another and in extending length of stay" (South Australian Tourism Commission and the Department for the Arts and Cultural Development 1996 p. 1.2).

A study commissioned by the South Australian Tourism Commission and the Department for the Arts and Cultural Development (1996) noted that between 70 and 80 per cent of tourists are 'general' cultural visitors. That is, they seek cultural experiences as a component of their visit rather than as their primary purpose of travel. This finding is, in part, supported by research by the European Association for Tourism and Leisure Education (ATLAS).

ATLAS reported that only 9 per cent of all tourists had travelled specifically to visit cultural attractions and that these attractions provided an ‘important’ or ‘very important’ motivation for their choice of destination (Richards 1996).

## **2.1 Motivation**

Studies of visitor motivation are essentially about why people travel. Motivation “acts as a trigger that sets off all the events in travel” (Parrinello, cited in Sharpley 1994, p. 96). Hence, it is widely recognised as one of the most fundamental and essential elements of tourism studies (Sharpley 1994). Studies which have examined motivation in tourism settings, for the purpose of this paper, can be grouped into those which explore the motivations of all tourists and those that look particularly at the motivations of tourists who seek cultural experiences.

### **2.2.1 Tourist motivation**

Many factors motivate people to travel. These include a personal need to escape from daily routines, a desire to learn about other cultures, meet new people, visit friends and relatives and to improve one’s education, knowledge, awareness or esteem. People may also travel because they are attracted to the unique scenery or experience of particular locations. A variety of disciplines have been employed to analyse these factors, including psychology, sociology, physiology and economics.

To understand an individual’s motivation to travel it is necessary to examine their desires, needs, experience and preferences and social, economic and demographic circumstances. In addition, it is necessary to explore the prevailing social norms and customs that influence an individual’s motivation. For example, Sharpley (1994) found that a religious pilgrimage is a significant purpose of journey within countries with an Islamic culture.

An individual’s motivation is recognised as changing over time. Using a hierarchy of basic human needs (based on Maslow’s analysis of needs developed in the 1950s) Pearce and others developed the notion that tourists may be thought of as having a motivational career (Pearce, 1993). They describe five different levels of motivation and argue that people have a career in their tourist behaviour. The five levels that form a ladder are, at the bottom, a concern with biological needs; moving up the ladder to safety and security needs; relationship development and extension needs; special interest and self-development needs; and finally at the top of the ladder, fulfilment or self-actualisation needs. Their subsequent research found that people tend to climb the ladder as they become older and more experienced tourists (Pearce, 1993).

Like a career at work people may start at different levels, they are likely to change levels during their life-cycle and they can be prevented from moving by money, health and other people. They may also retire from their travel career or not take holidays at all and therefore not be a part of the system.

(Pearce, 1993, p. 125)

Other tourist motivation theories argue that motivations are developed as a result of ‘push’ and ‘pull’ factors. Push factors relate to the needs and wants of individuals that lead them to ‘buy’ particular holidays. For cultural tourism and tourism as a whole, they include the desire for social interaction and relaxation, the need to escape, to experience something different and to learn about themselves and the places they visit. Some researchers have also suggested, as a push factor, the need to experience and to be involved in and stimulated by cultural activities: “all tourists desire this deeper involvement with society and culture to some degree; it is a basic component of their motivation to travel” (MacCannell, 1976 p10).

Pull factors relate to the characteristics or attractions of a travel destination. For cultural tourists, they include renowned historical sites and monuments and celebrated art exhibitions (Zeppel and Hall 1991). Cultural attractions such as the Sydney Opera House and Aboriginal sites are examples of pull factors that motivate people to visit Australia.

Although there is a large amount of literature on what motivates people to undertake travel and tourism, the quantity of research into cultural tourist motivation is limited. In particular, there are few studies or surveys exploring the motivation of inbound visitors to Australia’s cultural attractions, events and products, despite considerable interest in the Australian cultural tourism industry and the underlying motivations of visitors to the country.

### **2.2.2 Cultural tourist motivation**

What are the factors which motivate visitors to participate in cultural activities? Are there particular factors which lead some people to travel with culture as the primary motive and others to travel with culture as a lesser motive?

Crompton (1979) identified novelty and education as the main motives for participating in cultural activities. Other researchers have identified more specific motivations associated with special cultural interests. Museum visits provide the opportunity for social interaction with family and friends, for learning, discovering, emotional and spiritual enrichment, self-awareness and personal fulfilment, and social status (Zeppel and Hall 1991). There may also be desires to experience something new, authentic and unique. Similarly, art galleries attract visitors who want to experience something authentic, unique and beautiful, as well as to be educated (Hall and Weiler 1992).

Visitors to historic theme parks are motivated by an interest in history and desire to learn and discover how people lived in the past. Perceived authenticity, as well as the 'atmosphere' associated with historic buildings, are also important motives (Moscardo and Pearce, 1986).

Visitors who attend performing arts events are often motivated by a special interest in music, dance, theatre, or opera. Attendance at these events can also be prompted by reasons of prestige, social display and status (DiMaggio and Useem, and Hughes, cited in Zeppel and Hall 1991). Finally, for those who attend arts and community festivals, there are needs for 'escape' and to experience something authentic (Hall and Weiler 1992).

Social customs, as noted earlier, influence tourists' motivations. The concept of social class, for example, can be used to group individuals with similar values, lifestyles and behaviour. A study of the European heritage tourist market suggests that visitors from different social classes have different motives for visiting heritage sites. Middle-class visitors have stronger prior interests in history and more specific and purposeful intent (which may include a wish to learn about the past) compared with blue-collar or manual workers, who seem to use the sites for more general recreation (Light and Prentice 1994).

As suggested above, there are a combination of factors which lead people to travel with culture as either a primary or secondary motive. Motivating factors are not mutually exclusive. That is, most individuals are led to seek cultural experiences by a multiplicity of motives. However, the level of importance attached to each factor is a way to identify those visitors who have a specific interest in culture and those who travel to cultural sites for other reasons. The concepts of specific and general cultural visitors are developed further in Chapter 9 of this report.

### **2.2.3 Australian cultural tourist motivation**

Studies of visitor motivations at cultural attractions in Australia are limited and often focus on experiences with Aboriginal culture rather than Australian culture as a whole. Some Australian studies did not seek the motivation of visitors attending Australian arts and cultural venues but assumed that the large number of attendances at such venues was an indication of growing interest in Australia's cultural attractions and events (Akers and the Industries Assistance Commission, as cited by Zeppel and Hall, 1992).

Two surveys investigating the motivations (and the frequency of attendance) of inbound visitors at Australia's cultural venues showed that the dominant motives for visiting galleries and museums were a general or special interest in art, culture or history and a desire to see some examples of Australian art and culture. The surveys also indicated that visitors from English speaking countries (such as the United States, and the United Kingdom and Ireland) were more likely to have an interest in Australian art, culture or history than those from non-English speaking countries such as Japan (Australia Council, 1990a and 1991).

There were however a number of differences found between the two studies. For example, in 1989 visitors from New Zealand were the group most likely to have attended galleries and museums because they wanted to see particular exhibitions or artists' work and visitors from Canada were more likely than other overseas visitors to have attended cultural venues because they were taken by friends and relatives or their visits were organised through conventions they were attending. In 1990, however, New Zealanders were no longer as motivated to see particular galleries or museums, as previously found. Rather, people in the category 'Other countries' (visitors other than Europeans, North Americans, New Zealanders and Asians) became the group most likely to visit those particular venues or seek particular artists' work. In addition, a higher proportion of visitors from Asia were visiting cultural venues because friends and relatives took them or the visits were organised through conventions they were attending (Australia Council, 1990a and 1991).

The two surveys also investigated the dominant motives for attending live theatre and music performances. In the 1989 survey, the dominant motive was a general or special interest in arts or entertainment; while in the 1990 survey, visitors were largely motivated by a desire to see particular plays or artists.

The Australia Council sponsored another three surveys in 1990, 1993, and 1996 to measure inbound visitors' interest in Aboriginal arts and culture. In all three surveys close to one half of all visitors to Australia were either 'very interested' or 'fairly interested' in seeing and learning about Aboriginal arts and culture. However, the proportions recording a strong and moderate interest had changed, with the share of those expressing strong interest falling from 23 per cent in 1990 to 17 per cent in 1993 and 14 per cent in 1996 (Australia Council 1990b, 1993, 1996).

All three surveys found that visitors from the United States, Canada and Europe had the greatest interest in Aboriginal arts and culture, and visitors from New Zealand had the lowest level of interest (Australia Council 1990b, 1993, 1996). In a separate survey conducted for Geelong Otway Tourism (1995), all visitors expressed a 'strong' desire to learn more about Aboriginal history and culture as it represents a unique form of Australian culture.

In a survey of visual art and craft shopping conducted by the Bureau of Tourism Research in 1995 for DOCA, 20 per cent of visitors were interested in Aboriginal art and craft. Notably, visitors from Europe were more than twice as likely as visitors from Asia to be interested in such artefacts. For example, 53 per cent of German visitors had an interest in Aboriginal items, compared with 13 per cent of Japanese visitors. Visitors' interest in Aboriginal art and craft differed depending on the places visited: over 50 per cent of travellers to the Northern Territory had an interest in Aboriginal art and craft, compared with 9 per cent of travellers to Tasmania. Interest was highest among younger age groups: over 20 per cent of visitors aged between 15 and 34 years had an interest in Aboriginal art and craft products, including 30 per cent of those aged 20 to 24 years (DOCA, 1996).

However, the level of interest in cultural activities appears to be influenced by the availability of alternative activities, particularly among the young. According to the Geelong Otway Tourism survey (1995), young visitors (aged under 30) were unlikely to participate in cultural activities if nature-related activities were available. On the other hand, visitors aged 30 and over were more likely to engage in cultural activities.

In a study of the differences between visitors and residents and the implications of this for the management of interpretative settings, Moscardo (1992) found that many overseas visitors went to the Australian War Memorial because it was a tourist activity or part of a tour. This indicates that a high proportion of inbound visitors to this attraction were 'general' cultural visitors or that culture was not their primary motivation.

## 3 Supply characteristics

The aim of this chapter is to ‘set the scene’. That is, to provide an overview of the range of cultural resources and products available in Australia designed to enrich, educate and entertain visitors. It has been argued elsewhere that although a range of factors, including income and education levels, have led to an increasing interest in cultural tourism, there has also been a significant “supply-induced element of demand” (Richards, 1996). That is, visitors are more likely to seek cultural experiences when those experiences become more readily available and accessible.

Clearly cultural assets in Australia include both the physical resources – the museums, art galleries or amphitheatres – and the human resources – the dancers, tour guides or artists. Discussion therefore considers both categories.

### 3.1 Physical resources

Australia’s physical cultural tourism resources can be further grouped into arts centres and museums, including centres for performing arts; historic and heritage sites and buildings, including both original construction and replicas; Aboriginal sites; and venues with links to non-indigenous ethnic groups.

#### 3.1.1 Museums, Art Museums and Galleries

In 1993 there were 1,765 museums operating in Australia (ABS and DOCA, 1997). Victoria and New South Wales had the greatest numbers of museums while Tasmania had the greatest number of museums per head of population. The majority of these museums (1,103) are classified as general museums, displaying items of cultural, historic or scientific interest and being responsible for storing and conserving the items. The category of general museums also includes museums covering a specific topic such as transport or militaria. Other types of museum include those located at historic sites such as Captain Cook’s landing place at Botany Bay, and house museums – a restored or reconstructed building displaying items relating to the period of the building, for example, Old Government House in Brisbane.

In 1993, there were 124 art museums, that is museums which display visual art or craft objects for their aesthetic rather than historical value. The main art museums are the National Gallery of Australia in Canberra and the State-supported art galleries in all other Australian capital cities. There is also a network of regional galleries. There were 67 public exhibiting galleries. These include art spaces and non-profit galleries operated by artists. Public exhibition galleries borrow visual art or craft objects for display and unlike art museums, are not responsible for storing and conserving the objects (ABS and DOCA 1997).

### **3.1.2 Performing arts and festivals**

There were 881 employing businesses providing live theatrical or musical presentations including popular music, drama, musical production, symphony orchestras, dance and opera in 1997 (ABS, 1997). Examples of such organisations include the Sydney Theatre Company, the Australian Ballet, Opera Australia and the Melbourne Symphony Orchestra. During 1996–97 12.1 million people paid to attend 65,408 performances by these organisations.

The diversity of Australia, from its multicultural roots to its artistic interests, is vibrantly expressed through the many arts and cultural festivals ranging from youth and music festivals to folk dancing festivals. Australian States and Territories hold regular arts festivals, for example, in South Australia, the biennial Adelaide Festival. Regional and country areas also host regular festivals. An estimated 2.9 million Australians aged 18 years and over attended at least one art and cultural festival in a twelve month period, with a total of 4.1 million attendances. Interstate festivals were attended by 320,000 people and, of these, 125,000 indicated the main reason for interstate travel was to attend the festival (DOCA, 1997).

### **3.1.3 Historic, heritage and Aboriginal sites**

At 30 June 1997 there were 9,124 historic places on the Register of the National Estate. These include houses, parks gardens and trees, cemeteries and burial sites and shipwrecks. Almost 30 per cent of these historic places were houses and of these, the majority were located in new South Wales, Tasmania and Victoria (ABS and DOCA, 1997).

There were 888 Aboriginal places in the Register of the National Estate at 30 June 1997. Most of these places encompassed a number of Aboriginal sites. New South Wales, Queensland and South Australia had the largest number of Aboriginal places listed in the National Register. Of the 888 places listed, 207 (23.3 per cent) were art sites. There are also State registers of places (ABS and DOCA, 1997).

## **3.2 Human resources**

There is a diverse range of human resources involved in providing cultural activities and products in Australia. These include art gallery curators, multilingual tour guides, opera singers, and people who present and interpret Aboriginal culture and heritage. Some sectors of the cultural industries, such as museums, are characterised by large numbers of voluntary workers. In others, particularly in the performing arts and visual arts and crafts, workers move in and out of the industries as work opportunities present themselves.

The Australian Bureau of Statistics estimates that, in the 12 months ending March 1997, 877,000 Australians were employed in the cultural industries, with an additional 1.3 million having a work involvement in an unpaid or voluntary capacity (ABS, 1997b). This includes workers in museums, art galleries and heritage organisations, libraries or archives, radio

and television, cinema and video, design, writing and publishing, music and performing arts and those involved in teaching cultural activities. Females had a higher participation rate in paid cultural activities than males.

Table 1 indicates the number of people who received and did not receive some form of payment for work in selected culture and leisure activities in the 12 months ending March 1997. It should be noted that it is difficult to determine how many of these jobs are specifically tourism-related.

Table 1      People involved in selected culture/leisure activities  
(Twelve months ending March 1997)

Type of activity	Number of people (‘000)
Heritage organisations	46.5
Museums	39.5
Art galleries	34.4
Arts organisations and agencies	41.1
Art and craft show organising	144.8
Fete and festival organising	581.5
Art and craft activities:	
Drawing	130.3
Painting	129.4
Sculpture	38.5
Photography	116.7
Print-making	34.8
Electronic art	64.2
Pottery and ceramics	68.6
Textiles	76.2
Jewellery	21.6
Furniture-making and wood crafts	88.5
Glass crafts	21.2
Other art and crafts	108.7
Music:	
Live performer	208.8
No involvement as live performer	51.5
Performing arts:	
Performer	145.8
No involvement as performer	67.1
Writing and publishing	656.5
Teaching cultural activities:	
Secondary school teachers	71.4
Other teachers	208.7

Source: (ABS, 1997b)

## **4 Cultural motivations – supplementary survey**

To determine overseas visitors' attitudes and motivations toward cultural attractions in Australia, a survey supplementary to the IVS was conducted in the second half of 1996. The supplementary survey, known as the Cultural Motivations Survey, forms the basis for the remainder of this paper.

### **4.1 Aim**

The aim of the Cultural Motivations Survey was to explore inbound visitors' attitudes and motivations towards Australia's cultural activities. During the survey period approximately 60 per cent of all inbound visitors to Australia visited a cultural attraction or cultural performance during their stay. Little is understood, however, of the factors that motivate these visitors to spend some of their time in Australia attending cultural sites or performances and how or what influenced their decisions to do so.

This empirical analysis therefore adds value to the current literature by moving beyond simple characteristics to an exploration of the psychological features of cultural visitors – that is, what motivates them and influences their decision-making process. For example, what kind of information do visitors to cultural attractions value and how interested do they need to be in a particular experience before they visit a cultural site.

Since cultural visitors make up the majority of inbound visitors, it is also important to examine differences within this large group. For example, who visits an historical site as opposed to a festival? Is the decision to visit a particular site based on receiving information prior to travel? If so, what form of information is valued by visitors? These questions are also explored in this paper.

### **4.2 Methodology**

The IVS is the major source of information on the personal characteristics, travel behaviour and expenditure patterns of inbound visitors to Australia aged 15 and over. Interviews take place at Australia's major inbound airport departure lounges at Sydney, Melbourne, Cairns, Perth, Adelaide and Darwin.

Inbound visitors were selected to respond to the supplementary survey if they participated in at least one of the cultural attractions or activities listed in the 1996 IVS. Respondents who satisfied this criterion thus provided a sample of cultural visitors, which is used as the basis for the following analysis. The questions asked in the supplementary survey are provided in Appendix B.

The fieldwork was undertaken by AC Nielsen on behalf of the BTR between July and December 1996.

### 4.3 Sample

Between 1 July and 31 December 1996, 5,841 overseas visitors were interviewed at Australia’s major international airports. Of these visitors, 3,550 visited or attended one or more cultural sites or events. From this group, 1,221 visitors (34 per cent) were not surveyed or were unable to complete the supplementary questionnaire as they were about to board an aircraft — leaving a sample of 2,329 cultural visitors who responded to the supplementary survey. The following analysis includes estimates for those visitors who were unable to answer the supplementary survey.

The survey results have been weighted to ABS figures of international visitor traffic for the same period. The variables used in weighting the data were country of residence, purpose of journey, airport of departure and sex of visitor.

When individual respondents are weighted to their respective total visitor numbers, the sample of 3,550 cultural visitors represents 1,203,200 visitors over the September and December quarters 1996. Hence, it is estimated that 1,203,200 inbound visitors took time to participate in at least one cultural activity during their stay in Australia. This is equivalent to approximately 60 per cent of all inbound visitors over the same period (Table 2).

**Table 2: Sample size (weighted cases)**

Respondents cent of all inbound visitors	Number	Per
Visited at least one cultural attraction		
– represented by those answering supplementary survey	750 000	37.5
– represented by those unable to answer supplementary survey	453 200	22.7
<b>Total – All inbound cultural visitors</b>	<b>1 203 200</b>	<b>60.2</b>
Did not visit any cultural attractions	794 000	39.8
<b>Total – all inbound visitors</b>	<b>1 997 200</b>	<b>100</b>

Source: BTR IVS (1996) and BTR Cultural Motivations Survey

Table 3 shows the number of visits actually made to cultural attractions during the 6 month survey period. It is estimated that these 1,203,200 overseas visitors made a total of 2,134,700 visits to cultural attractions or, on average, close to two cultural visits per visitor during their stay in Australia. Visits to historic or heritage buildings, sites and monuments represent one third of all visits, while visits to museums or art galleries make up around another quarter.

**Table 3: Number of visits by inbound visitors to cultural attractions**

Type of cultural activity	Number of visits	Per cent of visits
Visiting historic or heritage buildings, sites, monuments	640 900	30
Visiting museums or art galleries	585 800	27
Visiting Aboriginal sites and cultural displays	319 100	15
Attending performing arts or concerts	245 100	12
Visiting art or craft workshops or studios	237 600	11
Attending festivals or fairs	106 200	5
<b>Total</b>	<b>2 134 700</b>	<b>100</b>

Source: BTR IVS (1996)

Given that there is more opportunity to visit an historic site than an art gallery or Aboriginal site (as discussed in Chapter 3), it is difficult to infer from these figures that inbound visitors seek these particular types of experiences more than others. The figures do however, clearly indicate the patronage of these sites by overseas visitors.

## 5 The characteristics of cultural visitors

By definition, cultural visitors are international visitors to Australia who attend any of the following sites or attractions during their stay:

- Aboriginal sites and cultural displays;
- art or craft workshops or studios;
- festivals or fairs;
- performing arts or concerts;
- museums or art galleries; and
- historic or heritage buildings, sites, monuments.

Respondents who said they had visited one or more cultural attractions during their stay were asked questions on **one** of the attractions they had visited. The interviewer randomly selected the attraction used for the supplementary survey. The number of visitors represented by those responding for each type of cultural attraction is shown in Table 4. The proportion visiting each type of cultural site closely reflects the actual level of visitation to those sites as discussed in the previous chapter (Table 3).

**Table 4: Cultural activities undertaken by inbound visitors**

Type of cultural activity	Number	Per cent of all cultural visitors
Visiting museums or art galleries	371 900	31
Visiting historic or heritage buildings, sites, monuments	325 200	27
Attending performing arts or concerts	176 500	15
Visiting Aboriginal sites and cultural displays	175 700	15
Visiting art or craft workshops or studios	103 800	9
Attending festivals or fairs	50 200	4
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

Source: BTR Cultural Motivations Survey

A necessary precursor to understanding the reasons why international visitors to Australia seek cultural experiences, the aim of this study, is an understanding of the type of inbound visitor who seeks these experiences. That is, an understanding of their characteristics such as age, gender, occupation, how long they stay in Australia, and so on.

The demographic characteristics of cultural visitors identified in the cultural motivations survey can be extrapolated using data from the IVS. Thus, it is possible to describe the set of inbound visitors who visit cultural attractions in Australia.

## 5.1 Country of residence

Forty-five per cent of inbound visitors who said they visited a cultural attraction in Australia were from Asia, 16 per cent from continental Europe and 15 per cent from New Zealand (Table 5).

Although the distribution of cultural visitors is reasonably consistent with the distribution of all inbound visitors for the year 1996 (BTR, 1996) a higher proportion of visitors from Europe (including the UK) and North America are likely to visit cultural attractions in Australia than are visitors from Asia (including Japan) and New Zealand.

**Table 5: Country of residence of cultural visitors**

Country of residence	Number	Per cent of all cultural visitors
USA/Canada	114 900	10
Europe		
United Kingdom	133 000	11
Germany	54 900	5
Other Europe	138 900	12
Asia		
Japan	222 100	19
Korea	82 600	7
Other Asia	238 700	20
New Zealand	177 800	15
Other countries	38 300	3
Don't know/not stated	1 900	0
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

## 5.2 Age

The average age of cultural visitors is slightly lower than that for all inbound visitors to Australia. For example, 35 per cent of inbound visitors who said they attended a cultural attraction in Australia were below the age of 30 years (Table 6). This compares to approximately 30 per cent of all inbound visitors in the same age group (unpublished IVS data).

**Table 6: Age of cultural visitors**

Age	Number	Per cent of all cultural visitors
15–19	53 700	4
20–29	378 400	31
30–39	214 500	18
40–49	229 900	19
50–59	167 000	14
60+		159 400
13		
Don't know/not stated	300	0
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

### 5.3 Gender

Female visitors were more likely than male visitors to visit cultural attractions. During the survey period female visitors made up 55 per cent of inbound visitors who said they visited a cultural site in Australia, though they made up only 50 per cent of all inbound visitors to Australia (Table 7) (BTR, 1996).

**Table 7: Gender of cultural visitors**

Gender	Number	Per cent of all cultural visitors
Male	546 400	45
Female	656 800	55
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

### 5.4 Occupation

The distribution of cultural visitors according to their occupation is also similar to that of all inbound visitors to Australia. Having said that, it is evident that teachers, lecturers and students are more likely than other visitors to visit cultural attractions. Teachers/lecturers constitute 10 per cent of inbound visitors to cultural attractions but only 7 per cent of all inbound visitors; students constitute 13 per cent of inbound visitors to cultural attractions but only 10 per cent of all inbound visitors (Table 8) (BTR, 1996). Conversely, visitors who

hold executive or managerial positions are less likely than other inbound visitors to visit cultural attractions. This is likely to be due to time constraints in their travel itineraries, particularly if their major reason for travel is business. Visitor occupations are grouped in accordance with the Australian Standard Classification of Occupations (Appendix C).

**Table 8: Occupation of cultural visitors**

Occupation	Number	Per cent of all cultural visitors
Professional		
Executive or managerial	162 400	13
Teacher, lecturer	122 100	10
Other professional	238 900	20
Skilled		
Technical	74 400	6
Skilled tradesperson	34 700	3
Semi-skilled		
Clerical staff	116 600	10
Salesperson and personal service worker	72 400	6
Drivers and plant/machine operators	1 100	0
Student (15 and over)	157 600	13
Other (employed)		
Labourer or related worker	11 700	1
Farmer, grazier	7 700	1
Other (not employed)		
Independent means/pensioner/retired	124 500	10
Home duties	62 400	5
Not employed	14 600	1
Don't know/didn't say	2 100	0
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

## 5.5 Main purpose of visit

Cultural visitors were also asked to indicate their main reason for visiting Australia. Table 9 demonstrates that 63 per cent of cultural visitors came to Australia as holidaymakers, 20 per cent came to visit friends or relatives and 5 per cent came for business purposes. Again these findings are consistent with those for all inbound visitors to Australia with the exception of business travellers (BTR, 1996). While business travellers make up 9 per cent of all inbound visitors to Australia, they make up only 5 per cent of those who said they visited a cultural attraction. This finding supports the suggestion above that inbound business travellers are less likely than others to take time out of their travel itinerary to seek cultural experiences in Australia.

**Table 9: Main purpose of visit of cultural visitors**

	Number	Per cent of all cultural visitors
Holiday	752 300	63
Visiting friends and relatives	243 000	20
Education	69 900	6
Business	60 200	5
Convention, conference, seminar, trade fair	38 300	3
Employment	14 900	1
Other reasons	24 500	2
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

## 5.6 Duration of stay

Inbound visitors who indicated that they visited a cultural attraction or attended a cultural performance while in Australia tend to stay longer than other inbound visitors (BTR, 1996). During the survey period cultural tourists stayed for an average of 32 nights in Australia compared with 24 nights for all inbound visitors. As is usually the case, the median stay in Australia (the length of time for which half the visitors stay longer and half stay less) for cultural visitors was much less than the average, reflecting the influence of a small number of relatively long staying visitors. Nevertheless, the median stay of cultural visitors (13 nights) was notably higher than that of all inbound visitors (9 nights) for the same period (BTR unpublished data). Table 10 shows the duration of stay of cultural visitors.

**Table 10: Duration of stay of cultural visitors**

Nights spent in Australia	Number	Per cent of all cultural visitors
1-7 nights	401 300	33
1-2 weeks	283 400	24
2-3 weeks	153 000	13
3-4 weeks	83 700	7
4-6 weeks	96 600	8
6-12 weeks	63 000	5
12-24 weeks	102 700	9
>24 weeks	19 200	2
<b>Total</b>	<b>1 203 200</b>	<b>100</b>

## **5.7 First and return visits**

Visitors to cultural attractions were more likely than other visitors to be on their first trip to Australia. While close to 60 per cent of visitors to cultural attractions, during the survey period, were on their first visit to Australia, this was the case for only 52 per cent of all inbound visitors (BTR, 1996). Of the visitors to cultural attractions who had been to Australia before: 14 per cent had visited once; 8 per cent twice; 5 per cent three times; 3 per cent four times; and 12 per cent five or more times.

## **5.8 Expenditure**

Inbound visitors who indicated that they visited a cultural attraction or attended a cultural performance while in Australia were more likely to spend more in Australia than other inbound visitors (BTR, 1996). During the survey period, cultural visitors spent a total of \$2.6 billion or 70 per cent of total expenditure by international visitors to Australia (excluding expenditure on prepaid international airfares and fully inclusive prepaid package tours).

On average, cultural visitors spent \$2,230 during their stay in Australia. This is approximately 20 per cent more than the average expenditure for all inbound visitors (\$1,920). On a per night basis however, cultural visitors spent slightly less (\$70 per night) than the average for all international visitors (\$79 per night).

## **5.9 Conclusions**

As cultural visitors make up 60 per cent of all inbound visitors to Australia, it could be expected that their demographic characteristics follow similar patterns. This was generally the case. Nevertheless, it is evident from the previous analysis that cultural visitors have some distinguishing features. For example, visitors from Europe and North America are more likely to seek cultural experiences in Australia than visitors from other markets. Visitors to cultural attractions also tend to be younger than the average inbound tourist and stay longer in Australia.

Emerging from this analysis is the importance of time and awareness in determining the type of visitor likely to visit a cultural attraction in Australia. It is clear that visitors who are in Australia on short, perhaps business, trips may not have discretionary time to seek cultural experiences. In contrast, inbound visitors who are on holiday or in Australia for an extended period of time are more likely to take part in cultural activities or visit cultural attractions during their stay.

Further, visitors from Europe or North America are more likely to visit cultural attractions than those from Asia or New Zealand. This may be a reflection of a number of separate factors or a combination of factors. For example, it is possible that visitors from Europe

and North America seek cultural experiences in Australia because they are conscious of the product available or have the capacity – language, contacts, past experience and so on – to become aware of the product. Again, this may be the result of a combination of influences including the maturity of the market, historic or existing links with Australia, or the marketing approach taken by Australia in their home country.

Low visitation rates by visitors from Asia and New Zealand may be the result of similar influencing factors which, because of the nature of the markets being discussed, result in very different outcomes. For example, it could be argued that some visitors from the Asian continent, particularly those from emerging markets, may not be as aware of the range of cultural attractions and activities available in Australia or may have language or other difficulties in finding or attending such sites. In contrast, visitors from New Zealand may be ‘too familiar’ with cultural activities in Australia given that many are on return visits (BTR, 1996) and may have sought cultural experiences previously or possibly believe that the two cultures, Australian and New Zealand, are very similar, also leading to low cultural visitation rates. The factors that lead to the level of visitor consciousness are again varied and difficult to deduce from this data alone.

This Chapter also begins to illustrate the significance of the cultural industry to tourism and tourism earnings. In fact, cultural visitors were found to spend approximately 20 per cent more than the average international visitor to Australia. Further, while inbound visitors who sought cultural experiences in Australia represent 60 per cent of all visitors to Australia, they represent 70 per cent of all visitor expenditure.

## 6 Motivation of cultural visitors

As previously discussed visitors travel for a variety of reasons. Individuals first need to form a desire to travel, and this is usually influenced by their own human needs such as the need for rest and relaxation, for personal development or to spend time with others. These factors that ‘push’ an individual to travel are usually combined with factors that ‘pull’ from the opposite direction – features that make a destination attractive including, for example, cultural or architectural icons, price, indigenous culture or weather. Recognising such influences, it is the aim of this chapter to explore the factors that influence an inbound visitor’s decision to visit a cultural attraction in Australia.

To obtain detailed information on the reasons why inbound tourists visit particular cultural attractions in Australia, the supplementary survey asked visitors to identify factors which may have influenced their decision to visit the attraction on which they were surveyed. Factors included in the questionnaire were derived from travel motivation theories discussed earlier.

### 6.1 Motivating factors

Respondents were presented with a card that contained 15 possible motivating factors. Recognising the multi-motivational nature of travel, respondents could select more than one response and were offered the opportunity to do so. Respondents were not asked to rate the motivation by degree of importance to their decision-making process. They were given the opportunity to indicate if there were other factors that led to their decision to visit a cultural site.

The possible motivations for attending or visiting the cultural activity or attraction included in the survey were:

- artist or professional in industry;
- specifically wanted to attend or visit;
- attended or visited only because friends or relatives visited – not personally interested in activity or attraction;
- activity or attraction was part of tour package;
- a break from normal schedule;
- to make new friends or industry contacts;
- activity or attraction provided an educational experience;
- to experience something Australian;
- interested in activity or attraction and wanted to spend time with friends or relatives;

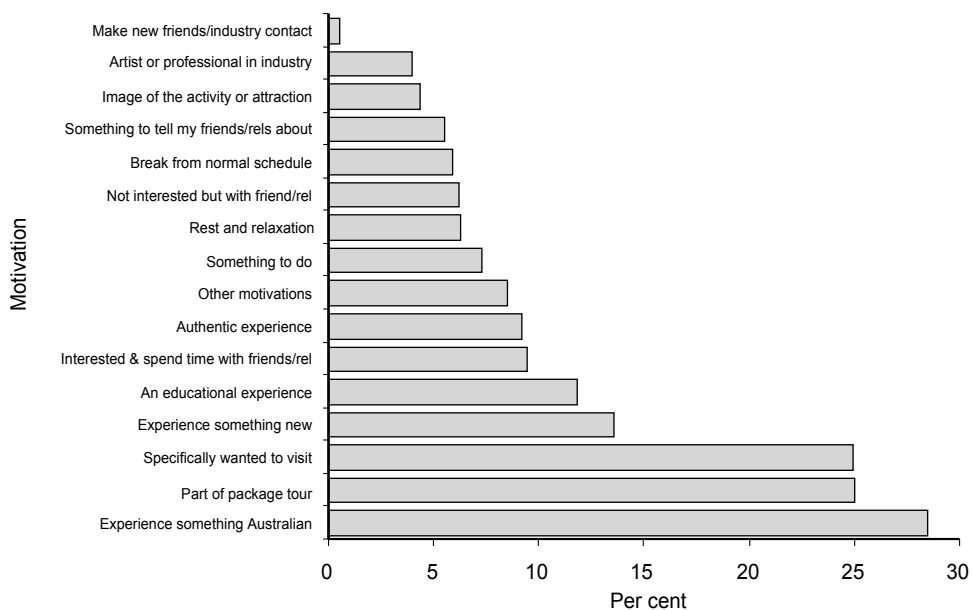
- to experience something new;
- just wanted something to do;
- image of the activity or attraction;
- for rest and relaxation;
- something to tell my friends or relatives about;
- to experience something authentic
- other.

On average cultural visitors gave 1.7 responses when they were asked to identify factors that motivated them to attend a particular cultural site. Some respondents (8.5 per cent) gave reasons for visiting the attraction other than those listed above. These are discussed further in Section 6.1.1.

The most frequent response from inbound visitors regarding their motivation to visit a cultural site was the desire ‘to experience something Australian’. Twenty-eight per cent of all cultural visitors said that this factor had influenced their decision.

Twenty-five per cent of cultural visitors indicated that they had ‘specifically wanted to attend or visit’ a particular cultural activity and a further 25 per cent attended as a ‘part of a tour package’. Factors that were least likely to influence visitors were the desire to meet new friends (0.5 per cent), being an industry member (4 per cent) or the visitor’s prior image of the attraction (4.4 per cent). Figure 1 shows the proportion of all cultural visitors influenced by the motivational factors included in the supplementary survey.

Figure 1: Cultural visitors’ motivations



### **6.1.1 Factors other than those included in the survey**

To draw a complete picture of the reasons why inbound visitors might visit a cultural attraction in Australia it is necessary to understand if there are factors other than those listed in the survey that might have influenced visitors' decisions. As indicated in Figure 1 above, 8.5 per cent of respondents representing 102,300 visitors indicated that factors other than those listed in the survey influenced their decision to visit a cultural attraction. Twenty-five per cent of these said that they visited the cultural attraction to shop while a further 13 per cent were attracted to the site or activity by the restaurants or pubs in the area. Others indicated that the attraction had been recommended to them (8 per cent), they had been influenced by promotional material reaching them through a variety of mediums including guide books, brochures, television advertising and promotion on public transport (7 per cent) or that they had previously visited the site (6 per cent).

## **6.2 Impact of demographic features on cultural visitors' motivation**

As cultural visitors represent a large group it is useful to explore differences in visitors based on their motivations. For example, are cultural visitors from Asia influenced by the same factors as visitors from Europe? Are younger visitors more likely to visit a cultural attraction to experience something new or because of a specific desire to visit a site or performance? Differences in motivation according to visitor characteristics are discussed below.

This is followed by an exploration into the factors that influence visitors to travel to particular cultural attractions. That is, what factors motivate an inbound visitor to attend an Aboriginal performance, a museum or an art gallery and do these differ depending on the attraction?

It is evident from Table 11 that visitors from Europe and North America are most likely to visit a cultural attraction because they desire to have an Australian experience. Visitors from Asian countries (particularly Japan), on the other hand, are likely to visit a cultural attraction as a component of their package tour, and visitors from New Zealand are likely to be motivated by a specific desire to attend an attraction or performance.

While no clear relationship was identified between cultural visitors' motivations and their age, older visitors tend to be more likely to seek an authentic experience. Conversely, younger visitors seek new experiences.

Male visitors are more likely than female visitors to see cultural attractions as an opportunity to experience something authentic or simply for something to do. Female visitors, on the other hand, are more likely than males to visit cultural attractions as a means of spending time with their friends or relatives, regardless of whether they are interested in the attraction.

**Table 11: Motivation of cultural visitors based on their demographic characteristics**

Per cent	Country of residence										Age				Gender		Return visit	
	USA & Canada					Other					New Zealand				Male	Female	First visit	Return visit
	UK	Other Europe	Japan	Other Asia	Other	15-19	20-29	30-39	40-49	50-59	60+							
Artist or professional in industry	2	3	5	2	4	7	6	3	2	5	4	7	3	5	4	4	4	
Specifically wanted to visit	29	32	32	8	20	41	21	27	22	24	25	25	31	24	26	18	35	
Not interested but with friend/rel	7	6	5	6	6	5	14	6	7	8	4	4	7	5	7	6	7	
Part of package tour	19	12	12	57	32	6	4	11	26	29	23	24	28	26	24	33	14	
Break from normal schedule	5	9	5	3	5	11	1	4	5	6	11	3	5	7	5	5	8	
Make new friends/industry contact	0	0	1	0	1	0	3	0	0	1	0	1	1	1	0	0	1	
An educational experience	17	18	14	8	8	13	10	15	13	12	9	14	11	12	12	12	12	
Experience something Australian	30	39	47	23	24	14	31	28	29	33	25	32	22	28	29	34	20	
Interested and wanted to spend time with friends/relatives	7	14	9	1	10	16	16	15	7	9	11	6	15	8	11	8	12	
Experience something new	17	22	20	4	11	13	24	20	17	14	12	10	9	13	14	16	9	
Something to do	9	10	6	4	8	8	11	7	7	10	4	13	3	10	5	7	8	
Image of the activity or attraction	8	5	6	3	3	4	4	4	5	5	5	4	3	5	4	5	4	
Rest and relaxation	5	4	9	2	11	4	6	5	5	7	7	7	7	6	6	5	8	
Something to tell my friends/relatives about	8	10	9	1	4	5	4	7	5	8	5	4	6	5	6	7	4	
Authentic experience	13	18	13	5	6	9	6	7	8	9	9	16	7	12	7	10	8	
Other motivations	11	7	5	15	6	10	7	6	10	10	8	6	9	9	8	7	11	
Not stated	0	0	1	0	0	2	0	1	1	0	1	0	0	0	0	0	1	
<b>Total</b>	114,900	133,000	193,800	222,100	321,300	177,800	38,300	53,700	378,400	214,500	229,900	167,000	159,400	546,400	656,800	707,100	496,100	

Source: BTR Cultural Motivation Survey

Note: Other Europe includes Germany and Other Asia includes Korea

Table 11: Motivation of cultural visitors based on their demographic characteristics (continued)

Per cent	Nights in Australia				Main purpose of visit				Occupation						
	1-7 nt.	1-2 wks	2-4 wks	>4 wks	Hol	VFR*	Bus/ Conf**	Emp/ Edu**	Other	Profess- ional	Skilled	Semi- skilled	Student	Other (emp)	Other (not emp)
Artist or professional in industry	3	4	6	4	3	6	8	4	7	6	4	1	5	0	4
Specifically wanted to visit	16	25	28	35	21	35	27	29	12	26	26	18	25	21	28
Not interested but with friend/rel	3	9	8	6	5	12	5	5	1	7	3	9	5	4	6
Part of package tour	45	21	16	9	36	5	11	9	13	22	30	43	14	10	25
Break from normal schedule	6	7	6	5	4	5	19	9	4	6	11	3	6	17	4
Make new friends/industry contact	0	1	1	1	0	1	1	0	3	1	1	0	0	0	0
An educational experience	7	12	17	15	11	10	14	26	9	13	9	8	15	23	11
Experience something Australian	18	30	38	33	29	27	29	29	27	30	26	28	30	7	30
Interested and wanted to spend time with friends/ relatives	5	10	10	15	6	21	6	11	11	7	8	7	12	21	17
Experience something new	7	13	15	22	13	12	11	23	22	13	12	14	20	2	12
Something to do	7	8	6	9	7	7	13	7	9	8	11	6	9	1	3
Image of the activity or attraction	4	4	5	5	5	4	5	3	3	5	4	3	6	2	5
Rest and relaxation	5	6	4	10	5	7	13	10	4	8	5	4	7	1	5
Something to tell others about	3	5	7	9	5	8	5	6	8	5	7	3	8	0	7
Authentic experience	6	9	14	11	10	11	5	7	6	11	15	5	9	1	7
Other motivations	13	6	6	7	7	9	11	12	20	10	11	8	9	1	4
Not stated	1	1	0	0	1	0	0	0	1						

Total 401 300 283 400 236 700 281 700 752 300 243 000 98 500 84 800 24 500 523 400 109 100 190 100 157 600 19 400 201 500

\* VFR – Visiting friends and relatives; Bus/Conf – Business and conference; Emp/Edu – Employment and education.  
 Source: BTR Cultural Motivations Survey

First-time visitors to Australia often participated in cultural activities to experience something Australian or because the activity was included on their package tour itinerary. In contrast, return visitors to Australia took time to see cultural attractions because they had a strong desire to do so.

The factors that influence inbound visitors to visit a cultural site in Australia appear to change according to the amount of time they spend in the country. Clearly, visitors who are in Australia for some time are able to discover particular attractions or sites they would like to visit specifically that they may not have been aware of prior to their arrival or during the earlier part of their stay. Similarly, as the time spent in Australia increases, visitors are more likely to seek new experiences. While visitors who spent between 2 and 4 weeks in Australia were the most likely to seek an educational or authentic and Australian experience, it is evident that as time in Australia increased, the desire to attain these goals waned somewhat.

For some motivations, however, there was little relationship with the visitors' length of time in Australia. For example, some sites were attractive to visitors, regardless of the amount of time they spent in Australia, simply for something to do.

Visitors on short stays were most likely to engage in cultural activities as part of a package tour.

Visitors' motivations to visit cultural sites in Australia also changed according to the primary reason a visitor travelled to Australia. For example, as might be expected, visitors whose main purpose of visit was to visit friends or relatives were the most likely group to indicate that they were motivated to visit a cultural site by the opportunity to spend time with those friends or relatives. It must be said however, that this was more likely to be the case if the visitors themselves were interested in the attraction.

Visitors who came to Australia on holiday were likely to visit a cultural attraction as a component of their package tour or in search of an Australian experience. Similarly, those visitors on business who did take time to visit a cultural attraction often did so to experience Australian culture or as a means to break up their schedule or relax.

## **6.3 Conclusion**

Only through an understanding of what motivates a tourist to seek a cultural experience can appropriate strategies be developed to optimise the value of this market. To this end, it appears that inbound visitors often visited cultural attractions or performances because they sought to experience something Australian. This was particularly the case for visitors from North America and Europe. The desire 'to experience something Australian' can be interpreted as a 'pull factor'. That is, overseas visitors were captivated by Australia's unique

culture and sought to experience it. This is an important finding for the Australian tourism industry as it indicates a strong desire for an ‘Australian experience’ by overseas tourists – an experience that cannot be reproduced by other destinations.

It was further demonstrated that visitors on package tours represent approximately one in four overseas visitors to cultural attractions in Australia. It is not possible, however, from this study to determine whether visitors chose a particular package tour because it provided a cultural component or for other reasons.

Some visitors were also drawn to Australia’s cultural activities by ‘push factors’ – that is, their needs and wants, as suggested by those wanting an authentic or educational experience, a break from their normal routine or rest and relaxation.

The results of the Cultural Motivations Survey provide testimony to the belief that travel to a site, cultural or otherwise, is generally inspired by a number of motives and that these motives vary according to the type of visitor concerned.

It was found that visitors from Europe and North America, older visitors and visitors who stayed in Australia for a longer period of time were more likely than others to seek an educational, authentic or Australian experience. On the other hand, visitors from New Zealand tended to have a specific interest in visiting a particular site and visitors on short stays and visitors from Asia (particularly Japan) were likely to be on a package tour.

## Motivating factors at cultural sites\*

### **Aboriginal sites and cultural displays**

A visit to an Aboriginal site is an experience sought after by cultural visitors rather than one used to fill in time. Very few cultural visitors said that they visited an Aboriginal site simply for something to do (2 per cent) or for rest and relaxation (2 per cent). Alternatively, many said that they were seeking an Australian experience (42 per cent) or had specifically wanted to visit a particular Aboriginal site or display (31 per cent).

Close to one half of inbound visitors to Aboriginal sites and cultural displays said that they had visited the site as part of their package tour. Interestingly, 32 per cent of those who were on a package tour also indicated that they were seeking an Australian experience. In addition, 12 per cent of visitors to Aboriginal sites on package tours said they were seeking an authentic experience.

### **Art or craft workshops or studios**

Only 9 per cent of all cultural visitors went to an art or craft workshop in Australia. Like inbound visitors to other cultural attractions, inbound visitors to art or craft workshops were most likely to be seeking an Australian experience (39 per cent), had a specific interest in the workshop or studio (30 per cent) or wanted an authentic experience (14 per cent). Inbound visitors to art or craft studios were however, more likely than visitors to other cultural attractions to want to experience something new (19 per cent) and be a member of the arts industry (9 per cent).

### **Festivals or fairs**

It is evident from the data that while cultural visitors go to festivals or fairs seeking an Australian experience, they do so on impulse. Cultural visitors to festivals and fairs were the group most likely to say that they had gone as a break from their normal schedule (26 per cent) and were less likely than most to say that they had a specific desire to visit this type of event (17 per cent). Visitors to festivals and fairs appear also to be attracted by the social dimension of the experience. Visitors to these sites were more likely than others to indicate that the opportunity to spend time with their friends or relatives influenced their decision. Very few however, sought an authentic experience and even less visited as a part of a package tour.

\* see Appendix D

## Motivating factors at cultural sites\*

### **Performing arts or concerts**

More than half of inbound visitors who attended the theatre or a concert in Australia said that they had a specific desire to do so. Others attended as a part of their package tour (15 per cent), for rest and relaxation (11 per cent) or to experience something Australian (11 per cent). Like visitors to festivals, the social aspect of the experience influenced visitors to performing arts. It is clear however that in this instance the cultural visitor also had to be interested in the performance.

### **Museums or galleries**

Thirty one per cent of cultural tourists surveyed visited a museum or an art gallery. Close to one third of these visitors wanted to experience something Australian, 21 per cent had a specific desire to do so and 20 per cent did so as part of a package tour. Other motivations included education (14 per cent) and the opportunity to experience something new (12 per cent). Very few cultural visitors said that they wanted to visit a museum or an art gallery because of their prior image of that site.

### **Historic or heritage buildings, sites or monuments**

Thirty two per cent of cultural visitors to historic or heritage building, sites or monuments visited as a component of their tour package. Others sought an Australian experience (23 per cent) or to experience something new (15 per cent). Like visitors to museums, visitors to heritage sites in Australia were unlikely to be influenced

\* see Appendix D

## 7 Planning and information

Not all interest in a destination, or motivation to travel is fulfilled. Literature on the travel decision-making process of tourists suggests that it is at the planning stage that information is collected and alternatives are considered (Mansfield, 1992). Through a process of elimination and assessment of alternatives, the individual can move to destination choice and finally to actual travel. The same decision-making process is applicable to tourists choosing to visit a cultural site. The planning and information steps are therefore important factors to consider in the context of this paper.

This chapter aims to address the following questions:

- do inbound visitors to cultural sites plan their visit ahead, and if so,
- what sources of information do they use?

To address these questions, a brief discussion is entered into on the type of visitor who plans their visit to a cultural site ahead of travel. This will be followed by an exploration of the information sources that visitors use in the planning stage.

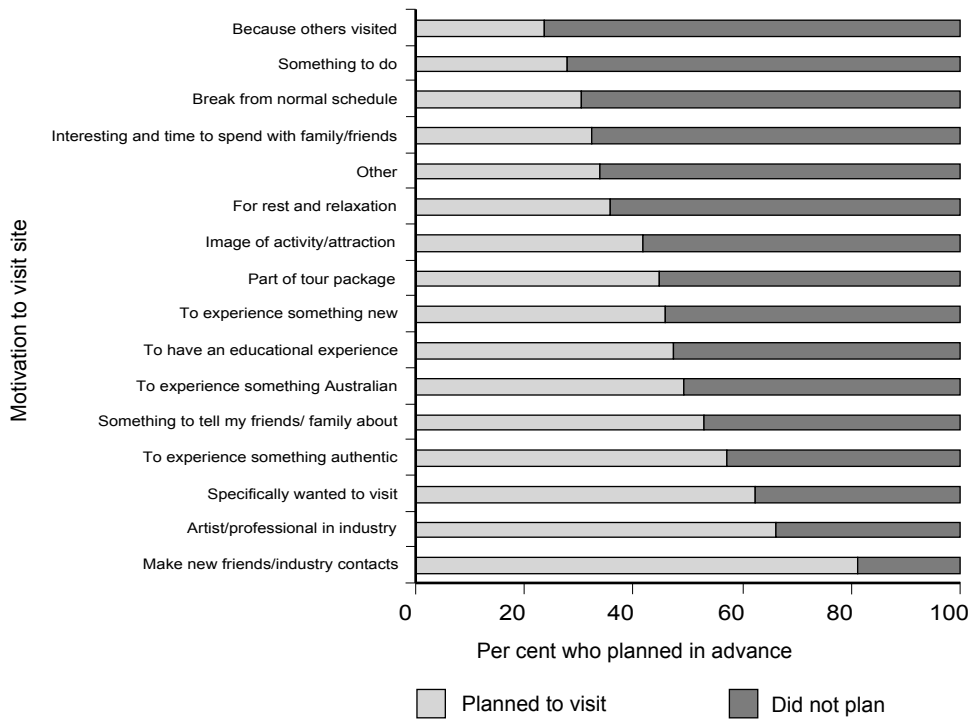
### 7.1 Planning

The Cultural Motivations Survey asked visitors if they planned to visit the cultural site on which they were surveyed. Interpretation of the term ‘plan’ was left to the respondent. Therefore it is not clear from the study results when a respondent made the decision to visit the site, only that the decision was made some time before actual travel.

Forty one per cent of cultural visitors, representing 497,400 visitors, planned their cultural activities in advance. Figure 2 shows that cultural visitors who wanted to establish industry contacts or were professionals in the cultural industry were more likely than most to plan their attendance to cultural sites in advance. This was also the case for respondents who had a desire to visit a specific cultural attraction, sought an authentic or Australian experience or wanted to have an experience worth telling their family and friends about.

The majority (59 per cent) of inbound visitors who said they attended a cultural site during their visit in Australia, however, did not plan their visit in advance. It is apparent from this survey that many respondents took time during their stay to visit a cultural attraction simply for something to do or because other family members or friends wanted to visit the site.

Figure 2: Motivation of cultural visitors who planned



A review of the demographic profile of visitors (Table 12 below) reveals that inbound visitors who planned to visit a cultural attraction in Australia tend to be younger and were more likely to be from continental Europe, on holidays, or in Australia for employment or education purposes. Visitors who indicate that their main reason for travel to Australia is to visit their friends or relatives are the group least likely to plan their trip to a cultural site. This supports previous findings that these visitors often visit the attraction as a way of spending time with their friends rather than having a particular interest or desire to be at the site.

Table 12: Information sources used by inbound visitors to cultural attractions

Per cent	Country of residence										Age					Gender		Return visit	
	USA & Canada	UK	Other Europe	Japan	Asia		Other	15-19	20-29	30-39	40-49	50-59	60+	Male	Female	First visit	Return visit		
					Other	Zealand													
Planned	44	32	50	48	34	44	32	49	43	40	38	47	35	39	43	42	40		
Did not plan	56	68	50	52	66	56	68	51	57	60	62	53	65	61	57	58	60		
<b>Source of information</b>																			
Films and documentaries	9	8	18	4	5	4	5	13	6	10	6	13	7	11	6	10	6		
Guidebooks and travel magazines	32	36	51	35	19	14	22	17	38	35	20	32	24	32	29	37	21		
Travel brochures/ travel agencies	28	26	47	56	31	33	6	15	36	55	42	31	37	42	36	45	28		
Recommended by friends/ relatives/ other visitors	35	42	33	33	28	43	78	41	35	34	38	29	40	34	37	34	38		
Advertising	13	24	11	1	11	37	15	21	20	12	15	5	11	12	17	10	20		
Books and other literature	10	12	20	5	21	8	11	1	8	17	8	32	6	12	14	13	13		
Clubs and societies	3	0	0	1	1	2	0	35	0	1	1	3	2	2	1	1	2		
Other influences	27	13	10	15	19	17	13	5	14	9	20	12	27	15	18	12	22		
<b>Total</b>	50 300	43 000	96 400	107 400	109 800	78 300	12 200	26 300	163 100	86 500	87 300	78 900	55 100	214 900	282 500	299 500	197 500		
Mean number of information sources used	1.61	1.63	1.94	1.50	1.36	1.57	1.48	1.55	1.57	1.72	1.52	1.59	1.55	1.6	1.57	1.65	1.50		

Note: Other Europe includes Germany and Other Asia includes Korea

Table 12: Information sources used by inbound visitors to cultural attractions (continued)

Per cent (emp)	Nights in Australia				Main purpose of visit					Occupation					
	1-7 nights	1-2 wks	2-4 wks	> 4 wks	Hol	VFR*	Bus/Conf*	Emp/Edu*	Other	Professional	Skilled	Semi-skilled	Student	Other (emp)	Other (not emp)
Planned	41	40	44	41	44	33	40	46	42	38	43	54	43	39	35
Did not plan	59	60	56	59	56	67	60	54	58	62	57	46	57	56	65
<b>Source of information</b>															
Films and documentaries	3	8	13	11	8	9	4	10	2	10	12	4	9	0	6
Guidebooks and travel magazines	21	34	37	36	35	26	19	21	18	29	42	27	33	55	27
Travel brochures/Travel agencies	43	45	37	27	47	22	35	13	11	42	35	44	22	18	39
Recommended by friends/relatives/ other visitors	22	38	47	42	30	58	31	40	37	37	24	31	38	32	44
Advertising	9	17	9	24	12	14	20	30	30	11	34	7	27	0	9
Books and other literature	13	13	17	10	13	12	15	14	13	17	13	11	11	11	7
Clubs and societies	1	2	2	0	1	2	1	0	13	2	1	0	1	0	2
Other influences	20	15	15	14	16	27	24	32	14	2	19	20	11	24	
<b>Total</b>	164 200	114 600	103 400	115 200	329 300	79 700	39 300	38 900	10 300	200 600	47 000	103 000	67 700	7 400	70 400
Mean number of information sources used	1.33	1.73	1.78	1.66	1.60	1.59	1.54	1.52	1.57	1.64	1.64	1.44	1.64	1.23	1.60

\* VFR – Visiting friends and relatives; Bus/Conf – Business and conference; Emp/Edu – Employment and education

## **7.2 Source of information**

As indicated previously, 41 per cent or 497,400 cultural visitors planned their visit to a cultural attraction in Australia beforehand. These visitors were asked to identify the information sources they used for planning purposes. Respondents were able to give multiple responses, indicating that visitors may obtain information from more than one source. The information sources included in the survey were:

- films and documentaries;
- guidebooks and travel magazines;
- travel brochures and travel agencies;
- recommendations from friends, relatives and other visitors;
- advertising;
- books and other literature; and
- clubs and societies.

Respondents were also given the opportunity to detail other sources of information they may have used.

### **7.2.1 Number of information sources used**

As indicated in Table 13 the majority of visitors found their information through only one source. However, on average, visitors who planned their visit to the cultural attraction on which they were surveyed used 1.6 sources of information in doing so. Table 12 above illustrates the type of visitor who was likely to seek more information than others, namely visitors from continental Europe, those who are aged in their 30s and those who stay in Australia between 2 to 4 weeks.

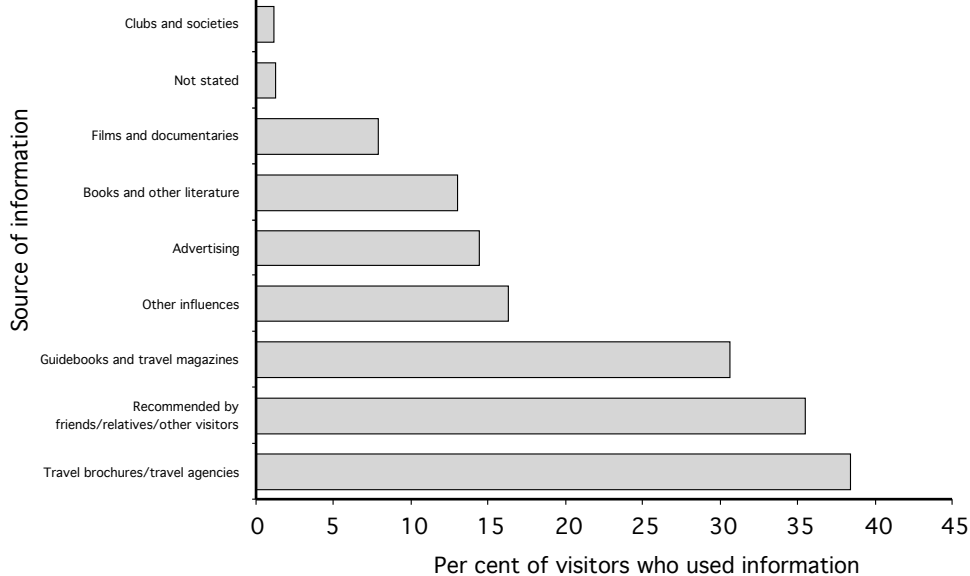
### **7.2.2 Type of information source used**

As shown in Figure 3, the most popular means through which visitors gathered information about cultural attractions and events was through the use of travel brochures and travel agencies (38 per cent of those who sought information), followed by recommendations from friends, relatives or other visitors (36 per cent), and guidebooks and travel magazines (31 per cent). These results are similar to the findings reported in the 1996 IVS, where the most common information sources used by all visitors for their trips to Australia were travel agents (45 per cent) and travel books or guides (37 per cent). It is evident, however, that friends and relatives have a far greater influence on visitors' decisions to visit cultural attractions than they have on visitors' decisions to visit Australia.

**Table 13: Number of information sources used by cultural visitors**

information	No. of information sources used	No. of respondents	Per cent of cultural visitors who used
	1	287 100	58
	2	138 100	28
	3	48 300	10
	4	10 400	2
	5	4 900	1
	6	500	0
	Mean		1.587
	Median		1
	Mode		1

**Figure 3: Source of information used by cultural visitors**



### 7.2.3 Sources other than those in the survey

Approximately 16 per cent of those visitors who sought information on cultural attractions before visiting them said that they used information from sources other than those listed in the Cultural Motivations Survey. When asked the source of information they used, close to one in three visitors who indicated that they used information sources other than those

included in the questionnaire said they learned about and visited the site from the tour they were on (as either the guide or participant). A further 20 per cent said that they knew of the attraction from a previous visit either to Australia or to the attraction itself. A small number of visitors (3 per cent of those who used other information sources) indicated that they had used the internet as a source of information.

### **7.3 Impact of demographic features on visitors' use of information sources**

From Table 12 it appears that the type of information visitors used in making their decision to visit a cultural attraction in Australia depends on their country of origin and the personal contacts that they might have in Australia. For example, recommendations from friends or relatives were an important source of information to visitors from New Zealand and the United Kingdom and to the visitors who said they were in Australia to visit their friends or relatives or for employment or education purposes. These visitors are more likely than others to have contact with Australians or expatriates who are able to provide them with advice on cultural events based on their own knowledge, previous experience or anecdotal evidence. Given that word of mouth was the major source of information for these visitors it could be suggested that they are likely to have planned their attendance at a cultural attraction or performance following their arrival in Australia.

Visitors who are on short stays, travelling for holiday or business, or from Japan, were more dependent on travel agents and brochures as a source of information prior to their visit to a cultural attraction. This is also true of visitors aged between 30 and 39, and on their first visit to Australia. Visitors from continental Europe used a range of travel literature and visitors from North America used a variety of information sources including, in some cases, information gathered from clubs and societies to make their decision. Given the sources of information used by these visitors it would appear that this group would be more likely than others to have planned their visit to particular cultural attractions some time before they actually travelled to Australia.

Younger visitors were more likely than others to use travel guidebooks, magazines and advertising while visitors over the age of 30 were more likely to use other forms of literature.

Inbound visitors who were on their first visit to Australia sought information from travel brochures, travel agencies, guidebooks and travel magazines; while those on return visits tended to use advertising material and 'other' sources of information.

## 7.4 Conclusions

It is evident that the majority of inbound visitors to cultural attractions in Australia do not plan their visit. Further, the two out of five visitors who do plan are likely to have collected information from only one source which is generally advice from travel agents or friends or relatives.

It has been found in this study, as with others, that prior knowledge, either personal or obtained from other sources, can change visitors' search activity (Ryan, 1995). Certainly in the current study the use of different information sources appears to depend on the availability of information from established or new networks. Those visitors who can draw from personal information sources such as friends or relatives are less likely to depend on other material when they collect information on cultural attractions. They include visitors from New Zealand and the United Kingdom and those who are visiting friends or relatives in Australia or who are able to make contacts through work or study.

Visitors who do not have such affiliations readily available to them turn to other sources of information, most particularly travel agents and guidebooks. It is apparent that visitors over the age of 30 use a range of literature to gather information on cultural activities, while younger visitors seem to use an even wider range of material including guidebooks and advertising. This may be a reflection of the recent proliferation of guidebooks aimed at younger travellers.

Although data on visitors' tendency to plan was collected in this study it would have been useful to include a time frame to explore **when** visitors planned. Although some assumptions can be made based on the type of information a visitor used it is not clear whether a visitor planned to visit a particular cultural attraction in Australia before they left home, or if they planned their visit after their arrival in Australia. Such data, combined with the data collected on information sources, would be valuable in the distribution of promotion and marketing materials and should be collected in future surveys.

## Planning and information at cultural sites\*

### **Aboriginal sites and cultural displays**

The majority of inbound visitors who sought to experience Aboriginal culture in Australia (60 per cent) planned their visit to an Aboriginal site or performance some time before their actual attendance. This is likely to be a reflection of the remote nature of many performances or restrictions, perceived or otherwise, on access to displays of Aboriginal culture. The majority of inbound visitors who planned their visit to an Aboriginal site collected information through travel-related sources (travel agents 62 per cent and guidebooks and travel magazines 54 per cent). Inbound visitors to Aboriginal sites or cultural displays were the most likely to be influenced by media including films and documentaries (19 per cent) and books and other literature (16 per cent) yet were the least likely to be influenced by recommendations from other visitors or their friends and relatives (31 per cent). Very few inbound visitors (4 per cent) who sought Aboriginal experiences noted advertising as a source of information.

### **Art or craft workshops or studios**

Approximately one in three inbound visitors (36 per cent) who went to an art or craft workshop while in Australia planned their visit ahead of time. Exposure to workshops of this kind was most likely to be through word of mouth (36 per cent), information gathered from travel brochures or travel agents (35 per cent) or other sources (29 per cent). Very few people were influenced by advertising (11 per cent) or books (12 per cent) featuring such sites.

### **Festivals or fairs**

Results from question 5 of this survey support the previous finding that inbound visitors who take time during their stay in Australia to visit a festival or fair are likely to do so on impulse. In fact, only one in four visitors who attended a festival or fair indicated that they had planned to do so (25 per cent).

It is evident however that those visitors who did plan their visit were most likely to be influenced by passive sources of information (ie. information that comes to them) including word of mouth (46 per cent) or advertising (40 per cent). This group were also more likely than others to use clubs and societies as an information source (12 per cent).

\* see Appendix D

## **Planning and information at cultural sites\***

### **Performing arts or concerts**

Like inbound visitors to Aboriginal sites, the majority of inbound visitors to the performing arts in Australia (54 per cent) planned their attendance prior to their visit. This is presumably a function of ticketing procedures required for most performances or concerts.

In discovering activities that were available during their stay visitors drew on sources that would contain up-to-date information. That is, visitors were more likely to be exposed to events through word of mouth (46 per cent) or advertising (43 per cent) than guidebooks (6 per cent) or other forms of literature (1 per cent) which would have been published well beforehand. Visitors to performing arts also collected information through travel agents and travel brochures (30 per cent).

### **Museums or galleries**

Thirty-six per cent of inbound visitors who went to a museum or gallery in Australia planned their visit. Like visitors to the performing arts, visitors who planned to visit a museum or gallery gathered information from a variety of sources. Notably, they were the group most likely to use books and literature as a source of information (26 per cent). Visitors to museums and galleries also valued word of mouth (32 per cent) and information from travel agents (30 per cent).

### **Historic or heritage buildings, sites or monuments**

Approximately one in three inbound visitors to heritage sites in Australia planned their visit. Visitors used no single source of information in planning their visit. Rather, visitors collected information from travel agents (35 per cent) guidebooks (34 per cent) and other visitors or their friends and relatives who may have had previous experiences at these sites (33 per cent). Very few, however, used the media, including films and documentaries (6 per cent) and advertising (4 per cent) as an information source.

\* see Appendix D

## 8 Satisfaction

The Cultural Motivations Survey also sought to measure cultural visitors' satisfaction through examining interest prior to visiting a cultural attraction in Australia and measuring change in level of interest as a result of actually visiting the attraction. Additionally, visitors were asked if they intended to return to Australia, and if so, would they visit the same site or an alternative cultural activity or attraction.

In this analysis therefore, satisfaction is assumed when an individual's level of interest in a particular activity increases as a result of experiencing that activity. Similarly, satisfaction is postulated if an individual chooses to seek an experience again, after having already participated in the same or similar activities.

By providing broad visitor satisfaction levels in this manner, it is possible to identify development opportunities available to the cultural industry to harness and optimise the benefits available through being involved in inbound tourism. As a nationwide survey, it is not practical to provide 'micro-level' analysis of individual attractions but it is possible to provide broad indicative trends of overseas visitor satisfaction at Australia's cultural tourist attractions.

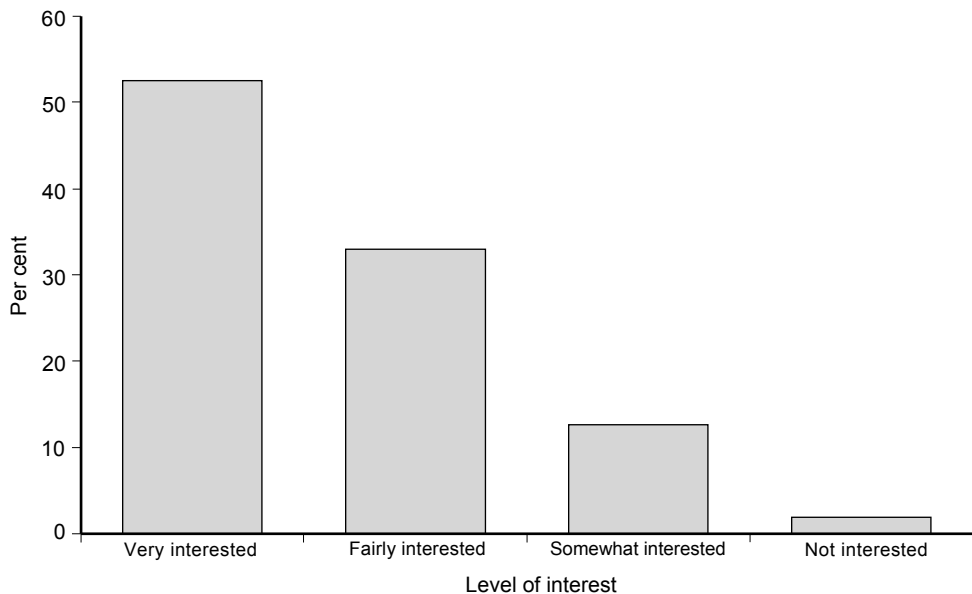
### 8.1 Levels of interest prior to participating in cultural activities

Of the 1,203,200 cultural visitors to Australia, 53 per cent said they were 'very interested' in the cultural activity on which they were surveyed prior to their participation, 33 per cent were 'fairly interested' and 13 per cent were 'somewhat interested'. Only 2 per cent of cultural visitors were 'not interested' in the cultural activity prior to participation. Figure 4 represents the pattern of interest of visitors in cultural activities prior to their participation.

Visitors from all source countries displayed the same general pattern of prior interest in cultural activities as that of all cultural visitors – that is, a high proportion of visitors 'very interested' trailing off to a very low proportion of visitors 'not interested'. While visitors from North America, continental Europe and New Zealand constitute fewer visitors (in absolute numbers) to cultural attractions in Australia, those who visit a cultural site demonstrate a high level of interest in doing so. Visitors from the United Kingdom and Asia (other than Japan) were less likely to say they were very interested in visiting the cultural activity or attraction on which they were surveyed.

The interest patterns of cultural visitors by country or region of residence are shown in Table 14.

Figure 4: Interest levels of cultural visitors prior to their participation in a cultural activity



Source: BTR IVS Cultural Motivations Survey

It is evident also from the data in Table 14 that while the majority of respondents indicated that they were very interested in the cultural activity or attraction on which they were surveyed, visitors over the age of 40, female visitors, and visitors on return visits to Australia displayed a higher level of interest than others. The eight per cent of cultural visitors who were in Australia for business or to attend a conference were the least likely to be very interested in the activity they visited. It is apparent that a visit to a cultural attraction for these visitors is of less importance than their primary reason for travelling to Australia.

## 8.2 Levels of interest after participating in cultural activities

Visitors were also asked to indicate whether their level of interest changed following their attendance or visit to the cultural attraction or activity on which they were surveyed. Fifty-five per cent of cultural visitors indicated their level of interest had increased, 43 per cent said their interest level remained unchanged and only 1 per cent felt their interest level decreased as a result of their visit (Figure 5). Combined with the information on prior interest in cultural activities prior to participation, this suggests that, in a general sense, cultural visitors were very satisfied with their Australian cultural experience.

Table 14: Level of interest in cultural attraction prior to and after visit

Per cent	Country of residence				Age						Gender		Return visit				
	USA & Canada	UK	Other Europe	Japan	Other Asia	New Zealand	Other	15-19	20-29	30-39	40-49	50-59	60+	Male	Female	First visit	Return visit
<b>Interest prior to visit</b>																	
Very interested	56	46	61	58	45	56	39	49	46	51	61	56	54	50	55	50	56
Fairly interested	32	39	27	28	38	28	50	38	38	34	24	28	36	33	33	34	31
Somewhat interested	9	15	9	12	14	15	9	12	13	14	12	15	8	15	11	14	11
Not interested	3	1	3	1	3	1	2	1	3	1	3	1	2	3	1	2	2
<b>Interest following visit</b>																	
Increased level of interest	60	54	56	60	51	56	44	70	48	56	58	65	53	57	54	55	56
Decreased level of interest	5	0	2	1	0	1	3	0	2	2	1	0	3	1	2	1	2
Interest unchanged	36	45	41	39	48	43	54	30	50	42	41	35	44	42	44	44	42
Total	114,900	133,000	193,800	222,100	321,300	177,800	38,300	53,700	378,400	214,500	229,900	167,000	159,400	546,400	656,800	707,100	496,100

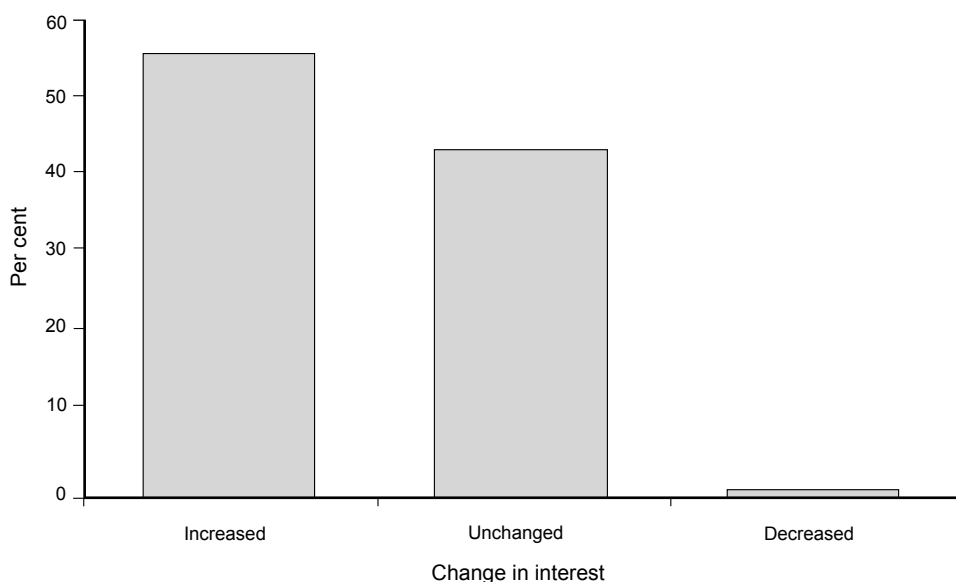
Per cent	Nights in Australia				Main purpose of visit						Occupation					
	1-7 nights	1-2 wks	2-4 wks	>4 wks	Hol	VFR*	Bus/Conf**	Emp/Edu*	Other	Prof	Skilled	Semi-skilled	Student	Other (emp)	Other (not emp)	
<b>Interest prior to visit</b>																
Very interested	51	58	55	52	52	56	47	48	61	76	71	62	71	85	82	
Fairly interested	36	27	33	33	33	30	35	40	20	20	22	29	25	13	14	
Somewhat interested	12	13	10	13	13	11	16	11	18	4	6	7	4	3	3	
Not interested	3	1	2	2	2	2	2	2	1	0	1	2	0	0	2	
<b>Interest following visit</b>																
Increased interest	51	53	58	53	53	52	70	68	51	68	71	52	78	65	65	
Decreased interest	3	2	1	2	2	1	0	1	0	1	2	1	1	0	0	
Interest unchanged	46	45	40	45	45	47	30	31	48	32	27	48	21	35	35	
Total	401,300	283,400	236,700	281,700	752,300	243,000	98,500	84,800	24,500	523,400	109,100	190,100	157,600	194,000	201,500	

\* VFR – Visiting friends and relatives; Bus/Conf – Business and conference; Emp/Edu – Employment and education.

Source: BTR Cultural Motivations Survey

Note: Other Europe includes Germany and Other Asia includes Korea

Figure 5: Change in interest following visit to cultural attraction



Interestingly, visitors who had indicated that they were ‘very’ interested in an activity prior to their visit were more likely than others to indicate that their interest had increased as a result of their visit (Table 15). The majority of visitors in other groups said that their interest level had remained unchanged following their visit.

Table 15: Interest levels before and after visit to cultural attraction

Change after visit	Increased per cent	Unchanged per cent	Decreased per cent
<b>Prior interest</b>			
Very interested	69	30	1
Fairly interested	38	59	2
Somewhat interested	46	53	1
<b>Not interested</b>	32	63	5

The majority of cultural visitors from all countries and regions, (except visitors from those countries grouped under ‘other countries’), recorded an increase in their level of interest in cultural activities as a result of participating in those activities (Table 14). While this remains the case for visitors from Asia (other than Japan) and the United Kingdom it is evident from the data that these visitors are less likely than others to say that their level of interest had increased as a result of their visit. This may be cause for further consideration given that these visitors attended the sites with the lowest level of interest in the first instance. Further cause for concern is in the number of visitors from the United States and Canada who experienced a decrease in their level of interest following a visit to a cultural attraction

in Australia. Close to 5 per cent of inbound visitors from North America over the 6 month period indicated that this was the case.

While only a small proportion of visitors overall reported a decline in interest levels, there was a large number (43 per cent) who did not experience a change in their level of interest in cultural activities as a result of their experience (Figure 5). By providing for an experience that reflects the factors influencing inbound visitors to seek cultural experiences, as discussed in Chapter 6, the cultural industry has an opportunity to stimulate a higher level of interest and boost satisfaction and thus attendances, particularly through repeat visitation, at cultural attractions.

Particular attention in this area could be directed toward visitors from the 'Other Asia' region who made up the largest proportion of cultural visitors (27 per cent) yet had the lowest level of prior interest in visiting a cultural attraction and made up the largest proportion of those whose interest levels in culture remained unchanged (30 per cent) as a result of their experience. As discussed in Chapter 6, 25 per cent of visitors from this region visited cultural attractions as a component of a package tour. Further investigation needs to be undertaken to determine if cultural experiences were a stimulus in the purchase of a particular package tour or if the packages were purchased for alternative reasons.

With the exception of cultural visitors aged in their 20s, most cultural visitors in other age groups gained a higher level of interest in culture following their participation in cultural activities. In particular, 70 per cent of cultural visitors aged between 15 and 19 years old reported a rise in interest levels, followed by 65 per cent of cultural visitors aged in their 50s. Less than 50 per cent of cultural visitors aged between 20 and 29 years old indicated an increase in interest levels.

The data in Table 14 also demonstrates that business visitors were most likely to have their interest in Australian culture aroused as a result of visiting a cultural performance or attraction. This was closely followed by visitors who came to Australia for employment or education.

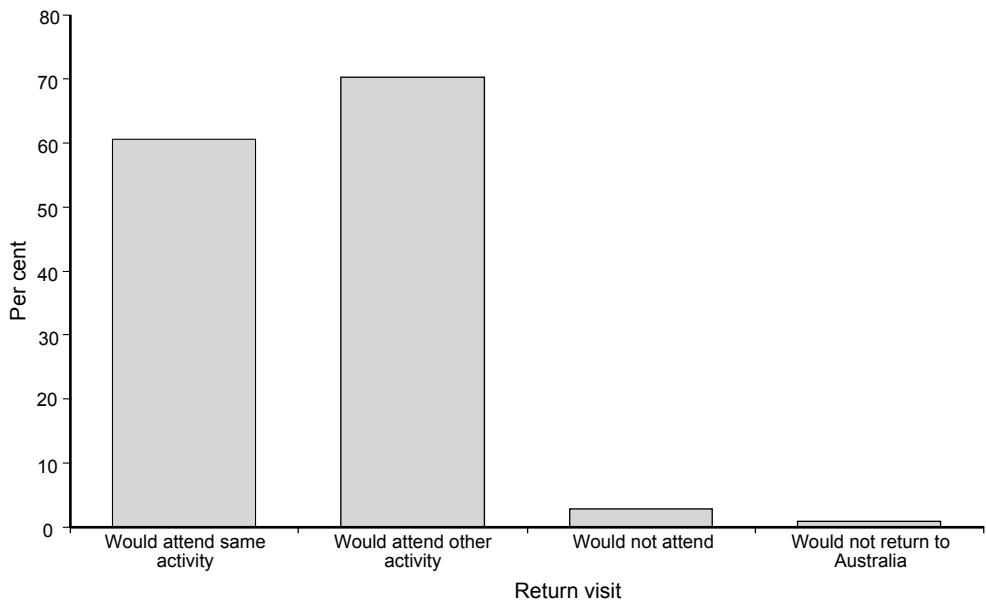
### **8.3 Repeat visit**

The health of the tourist industry in Australia is related to the number of visitors arriving in the country. It is thus of fundamental importance to inspire visitors to return to Australia in the future or to recommend Australia as a desirable destination to others. To discover the likelihood of visitors returning for a cultural experience in Australia, visitors were asked whether they would attend or visit the cultural activity or attraction again, or other cultural activities, if they returned to Australia. This information is closely related to the information on the interest levels of cultural visitors, as a visitor's willingness to participate in a cultural activity in the future is based on whether they were initially interested in, and have maintained an interest in, that activity.

Results from the Cultural Motivations Survey indicate that 61 per cent of cultural visitors would attend or visit the same cultural attractions or events again if they revisited Australia, and 70 per cent of cultural visitors indicated they would participate in cultural activities other than the type on which they were surveyed (Figure 6). Only 3 per cent of cultural visitors said that they would not engage in any cultural activities if they returned to Australia, while a mere 1 per cent of cultural visitors felt that they would not return to Australia. This is in contrast to the 27 per cent of all inbound visitors in 1996 who indicated that they would not return to Australia in the next five years (BTR, unpublished data).

It is likely that the prospect of returning to a cultural attraction would differ according to the type of attraction visited. Given that performances are generally over a limited period, visitors are less likely to attend the same performance on a return visit to Australia. They might, however, chose to visit a similar performance or cultural attraction. This is recognised, to some extent, in the site analysis at the end of this chapter. What is not apparent is the extent to which performances at other types of cultural attractions influence the results.

Figure 6: Return visit to cultural attractions



These results are very encouraging for future cultural tourism activity. The survey suggests that of the estimated 1,203,200 cultural visitors to Australia during the September and December quarters of 1996, the vast majority would return to Australia for another visit and would include cultural activities on their itinerary.

## 8.4 Conclusion

From this analysis it can be argued that inbound visitors who visit cultural attractions in Australia are satisfied with their experience. It is evident that those visitors who do visit a cultural site in Australia generally have a high level of interest in doing so. This interest is likely to remain unchanged for a substantial proportion of visitors and increase for the majority of others. Importantly, very few visitors recorded a decline in their level of interest based on their present cultural experience in Australia.

It has been noted in this chapter, however, that even amongst those visitors who have developed an interest in Australian culture there exist opportunities to improve the visitation rates and satisfaction levels of particular market segments. For example, it was found that while visitors from the Asian continent made up the majority of inbound visitors to cultural attractions, they displayed the lowest levels of interest in the attraction both prior to and following their visit. Recognising that many visitors from Asia visited cultural attractions as a component of a package tour, further study could be undertaken to ensure that visitors' expectations match their actual experience.

Further, the potential presented to the cultural industry by visitors who travel to Australia for business or to attend a conference has been demonstrated in this chapter. While these visitors make up only 5 per cent of inbound visitors to cultural attractions, more than two out of three of those who did attend had their interest in cultural experiences further aroused. Such heightened awareness and interest may inspire future attendance by these visitors (and others who may travel with them) on return visits to Australia possibly for purposes other than business.

## **Satisfaction at cultural sites\***

### **Aboriginal sites and cultural displays**

Inbound visitors who sought an Aboriginal experience during their stay in Australia did so because of an already formed interest in Aboriginal culture. Six in ten visitors to Aboriginal sites or cultural displays indicated that they were very interested in visiting the attraction prior to their visit, and a further two out of ten indicated that they were fairly interested in doing so.

It is also apparent from the data that inbound visitors to Aboriginal sites were satisfied with their experiences. This position is based on the findings that sixty-one per cent of those who visited an Aboriginal site said that their interest in this kind of attraction had increased as a result of their visit and 38 per cent said that their level of interest had not changed. Additionally, more than one in two (56 per cent) of visitors said that they were interested in returning to the same site for a future visit and 76 per cent indicated that they would attend other cultural activities on return to Australia.

### **Art or craft workshops or studios**

While the majority of inbound visitors said they were interested in visiting an art or craft workshops before they did so, it is evident that for many their level of interest was of a general nature (46 per cent very interested, 40 per cent fairly interested and 13 per cent somewhat interested). Further, while 50 per cent of visitors to art workshops noted that their level of interest was not stimulated as a result of their visit, two out of three said that they would return to the same workshop on return to Australia.

### **Festivals or fairs**

Results from the Cultural Motivations Survey point to the largely untapped potential that inbound tourists present to organisers and merchants of festivals and fairs. The 4 per cent of cultural visitors who went to festivals and fairs were the least likely group to say they had a prior interest in doing so (approximately 39 per cent very interested or fairly interested and 23 per cent only somewhat interested) yet were more likely than visitors to other cultural sites to say that their interest had increased as a result of their visit (68 per cent) and that they would return to the same event on their return to Australia (82 per cent). Evidently inbound visitors to Australia are unaware of the entertainment and merchandise value of festivals and fairs. Those who do discover these events, however, are highly satisfied with their experience

\* see Appendix D

## Satisfaction at cultural sites\*

### **Performing arts or concerts**

Inbound visitors who attended cultural performances or concerts in Australia were likely to do so because they had a high level of interest in the event (72 per cent very interested, 18 per cent fairly interested). As discussed in Chapter 7 this interest translated into forward planning by these visitors. Interest levels were at least maintained (40 per cent) if not increased (60 per cent) as a result of attending an event. Somewhat surprisingly, given the nature of performances, more than one in two visitors (56 per cent) indicated that they would like to attend the same event on their return to Australia. A further 73 per cent indicated that they would visit other cultural attractions on their return to Australia.

### **Museums or galleries**

Fifty-two per cent of international visitors who toured a museum or gallery in Australia said that they were very interested in doing so prior to their visit. A further 35 per cent were fairly interested and 11 per cent were somewhat interested prior to their visit. As with inbound visitors to other cultural attractions in Australia, visitors to museums or galleries were likely to at least maintain their interest in this type of attraction (46 per cent) or increase their interest (53 per cent) as a result of their visit. This is reflected in the finding that 59 per cent of these visitors would like to visit the same attraction again and 71 per cent were interested in visiting other cultural attractions on their return to Australia.

### **Historic or heritage buildings, sites or monuments**

It is apparent that while approximately one in three cultural visitors went to an historic or heritage site while they were in Australia, they did so with a general level of interest (42 per cent very interested, 43 per cent fairly interested and 14 per cent somewhat interested). This finding supports the previous proposition that although visitor numbers to these sites exceed those to other sites, it is not necessarily the case that inbound visitors seek these experiences more than other experiences. Rather it is likely, at least to some extent, to be the availability of these attractions that makes them popular to inbound visitors (see Chapter 3 of this study).

Fifty-four per cent of inbound visitors to heritage sites said that their interest had increased as a result of their visit and a further 45 per cent indicated that their interest level was unchanged. Sixty-two per cent indicated that they would visit the same attraction on their return to Australia.

\* see Appendix D

## 9 'Specific' and 'general' cultural visitors

Chapters 5 to 8 have identified the characteristics of inbound visitors who visit or attend cultural attractions or performances in Australia – 'cultural visitors' – and their motivations and general level of satisfaction. While it is possible to categorise this group as a whole and examine how they differ from all inbound visitors, it is also appropriate to explore differences within the group termed 'cultural visitors'. Authors elsewhere have noted that not all visitors to cultural attractions can automatically be classified as cultural tourists. Richards argues that many tourists "consume cultural attractions as part of a wider tourism experience (such as a beach holiday), and these tourists are not driven by any particular cultural motives" (Richards, 1996, p. 270). Prentice points to the importance of "non-specific or general factors" in attracting tourists to heritage attractions when on holidays (Prentice, 1993, p. 95). Others go so far as to suggest that the term cultural tourism is used indiscriminately and is often applied "to situations as diverse as trips where culture is the main activity and the prime motivation, through to trips where it is a secondary activity and an incidental motivation" (Hughes, 1996, p. 708).

Of particular interest, in the context of this report, is how cultural tourists differ according to the level of importance they place on experiencing Australian culture – on whether culture is their primary or secondary motivation for travel, and how this determines their behaviour, including the type of cultural activity they seek, the way they plan their visit, how they obtain information and their likelihood of return.

### 9.1 Definitions

The concepts of the 'specific' and 'general' cultural visitor have been introduced in this paper in an attempt to examine the impact of the specificity of visitors' cultural interest on their behaviour. A 'specific' cultural visitor, for the purpose of this exploration, therefore, is one whose primary motivation for travel to a cultural attraction is based on a specific desire to experience a particular aspect of Australian culture. For example, a visitor from New Zealand who travels to Australia to attend a performance of the Phantom of the Opera would be considered a 'specific' cultural visitor. So too would a visitor from North America whose primary motivation for travel to Australia is to experience elements of Aboriginal culture.

A 'general' cultural visitor, on the other hand, is one for whom culture is a secondary (or lesser) motivation. That is, participating in a cultural activity or visiting a cultural site is one component of their stay in Australia. An example of a general cultural visitor is an individual from Indonesia who travels to Australia to attend the wedding of a family member and then decides to visit the National Gallery of Australia during their stay. Similarly, a backpacker from Ireland attending a rock concert in Australia is considered a 'general' cultural tourist.

Dividing cultural visitors into those who have a particular or specific interest in culture and those who have a general interest provides a glimpse into the intensity of a visitor's interest in culture and how different degrees of interest in culture affect visitors' behaviour. In identifying the number of inbound visitors to Australia who travel to specifically experience Australian culture it is also possible to measure the influence of cultural activities on the overall level of inbound tourism and to broadly estimate the value of Australian culture to the tourism industry.

## **9.2 Methodology**

Specific cultural tourists were identified by grouping the factors which had motivated them to attend a particular site or attraction (Question 2) (see Appendix B). Those who indicated that they had a specific interest in visiting a cultural site or who worked in the industry (categories 1 and 2 of Question 2) were considered to be 'specific' cultural visitors – those stimulated to specifically seek the experience offered at the cultural attraction or performance on which they were surveyed. Visitors who attended cultural attractions for other reasons were categorised as 'general' cultural visitors (categories other than 1 and 2 of question 2). For example, respondents who indicated that they visited the site to experience something new or for something to do were considered 'general' cultural tourists.

A review of the demographic characteristics of specific and general cultural visitors is presented in this chapter followed by an exploration of their behaviour in terms of their planning, collection of information, interest and intention to revisit the same or similar attractions in the future.

## **9.3 Specific and general cultural visitors**

During the six month survey period 337,000 or 28 per cent of visitors who sought a cultural experience during their stay in Australia indicated that they had a specific desire to visit the cultural attraction on which they were surveyed or were members of the cultural or arts industry. The remainder were considered to have visited the cultural attraction with a general level of interest in culture.

### **9.3.1 Demographic profile**

It is apparent from the profile depicted in Table 16 that visitors from New Zealand are the group most likely to visit cultural attractions in Australia because they have a specific desire to do so. Given that in 1996 close to 90 per cent of visitors from New Zealand had visited Australia at least once previously (1996 IVS) it is plausible to assume that many of them are aware of a range of cultural attractions available in Australia. Further, as a result of the close ties between Australia and New Zealand, it can be assumed that visitors from New Zealand are more likely than visitors from elsewhere to have friends or relatives in Australia,

or who have visited Australia, who are able to recommend activities based on their own experiences. Findings outlined in Chapter 7 demonstrate the importance of networks as a source of information for tourists planning their visit to a cultural attraction.

Close to one-third of visitors from Europe and North America also sought a particular cultural experience while in Australia. This compares with only 18 per cent of visitors from the Asian continent. Notably, visitors from Japan have a very general level of interest in the performances or attractions they attended.

It is evident also from this profile that older visitors, visitors on return visits to Australia and those who came to visit friends and relatives and who stay in the country for longer periods of time are more likely than others to form a specific desire to visit particular cultural attractions. Conversely, younger visitors, visitors on holiday and visitors on a short stay in Australia are likely to visit a cultural attraction because of a more general level of interest.

### **9.3.2 Expenditure**

Table 16 also demonstrates the expenditure levels of specific and general cultural visitors. It was found that while, on average, cultural visitors spent more than all inbound visitors to Australia (demonstrated in Chapter 5), those visitors who are specifically interested in Australian culture are likely to spend more again.

In the 6 months to the end of December 1996, inbound visitors who had a specific desire to see and learn about Australian culture spent a total of \$825 million in Australia (excluding package tours and prepaid international airfares). This suggests that, on a calendar year basis, \$1,650 million in foreign exchange is directly attributable to the cultural opportunities and experiences available in Australia. Other inbound visitors who went to a cultural attraction with a general interest spent \$1,906 million during the same period or the equivalent of \$3,812 million over the calendar year.

**Table 16: Profile of 'specific' and 'general' cultural visitors**

		Specific		General	
		Number	per cent	Number	per cent
Total of all visitors to cultural attractions		336 000	28	860 000	72
Country of residence	Europe				
	– United Kingdom	45 200	34	89 100	67
	– Other	69 800	36	122 100	63
	North America	34 500	30	80 400	70
	Asia				
	– Japan	22 200	10	199 900	90
	– Other	73 900	23	247 400	77
	New Zealand	80 000	45	92 500	52
Other	10 700	28	28 000	73	
Gender	Male	147 500	27	398 900	73
	Female	190 500	29	466 300	71
Visit to Australia	First	151 100	21	554 200	78
	Return	184 700	37	306 100	62
Age	15–19	15 600	29	37 600	70
	20–29	90 800	24	280 000	74
	30–39	60 100	28	154 400	72
	40–49	62 100	27	165 500	72
	50–59	50 100	30	116 900	70
	60+	54 200	34	105 200	66
Occupation	Professional	158 100	30	361 100	69
	Skilled	29 500	27	78 400	72
	Semi-skilled	35 900	19	154 200	81
	Student	46 800	30	110 635	70
	Other (employed)	4 000	21	14 600	75
	Other (unemployed)	61 100	30	140 400	70
Main purpose of visit	Holiday	180 600	24	564 200	75
	Visit friends and relatives	97 200	40	145 800	60
	Business/conference	29 600	30	69 000	70
	Employment/education	26 300	31	58 500	69
	Other	4 400	18	19 800	81
Duration of stay	1–7 nights	72 200	18	325 100	81
	1–2 weeks	76 500	27	201 200	71
	2–4 weeks	78 100	33	156 222	66
	>4 weeks	107 000	38	174 700	62
Expenditure	Average (\$s)	2 480		2 230	
	Total (millions\$)	825*		1 906*	

7 155 respondents did not state any influences, and therefore are not categorised as specific or general cultural tourists

\*Totals do not add to expenditure of all cultural visitors because of rounding and assumptions made regarding expenditure by those visitors who did not answer the cultural motivations survey

### 9.3.3 Behaviour

As might be expected, visitors with a specific desire to visit a cultural attraction were far more likely than others to plan their visit ahead and to indicate that they were 'very' interested in the attraction or performance prior to attending it. However, these same visitors were most likely to say that their interest intensified as a result of their attendance at the site and that they would visit the same or other cultural attractions if they returned to Australia.

Table 17: Behaviour of 'specific' and 'general' cultural visitors

		Specific		General	
		Number	per cent	Number	per cent
Total of all visitors to cultural attractions		336 000	28	860 000	72
Plan	Yes	207 900	62	291 000	34
	No	127 700	38	574 300	66
Prior interest	Very interested	268 900	80	362 100	42
	Fairly interested	56 600	17	340 400	39
	Somewhat interested	11 500	3	140 300	16
	Not interested	0	0	900	0
Interest following visit	Increased	210 300	62	454 800	53
	Unchanged	124 000	37	395 000	46
	Decreased	1 200	1	14 700	2
Return visit	Will attend same activity/attraction	233 500	69	496 300	57
	Will attend other activity/attraction	263 900	78	583 000	67
	Will not attend activities/attractions on return	7 100	2	26 900	3
	Will not return to Australia	700	0	900	1
		Per cent of those who planned		Per cent of those who planned	
Information Source	Films and documentaries	25 200	12	14 300	5
	Guidebooks and travel magazines	62 000	30	91 100	31
	Travel brochures/ travel agencies	71 700	35	119 600	41
	Recommended by friends/ relatives/other visitors	86 900	42	90 800	31
	Advertising	47 200	23	24 700	9
	Books and other literature	27 400	13	37 800	13
	Clubs and societies	3 800	2	1 200	0
	Other influences	33 500	16	47 700	16

As noted earlier, visitors with a specific interest in cultural activities were far more likely than others to plan their participation in that activity ahead of time. In doing so they consumed information from a broad range of sources. While the major sources of information for this group were the same as those used by all inbound visitors to cultural attractions – word of mouth and information from travel agents and travel literature – it is also apparent that this group were more likely than others to be influenced by media including advertising and films and documentaries.

For this group, the influence of advertising and motion pictures may be a function of an already heightened awareness to culture. Visitors who have a predisposition to attaining cultural experiences are likely to be responsive to information reaching them through a variety of mediums that depict cultural opportunities both prior to, and during, their stay in Australia. On the other hand, images portrayed in advertising and films may have stimulated a visitor's interest in Australian culture. The 'pull' potential of media such as films and documentaries is well recognised (Riley & Van Doren, 1992).

## **9.4 Conclusions**

Many tourists do not travel with culture as their primary motive. Seventeen per cent of all inbound visitors to Australia or 28 per cent of visitors who responded to the survey travelled with culture as a primary motive – that is, they visited a cultural attraction because they had a specific desire to do so or are members of the cultural industry.

Indeed, if opportunities to satisfy visitors' cultural interests were not available, some of these visitors may not have chosen Australia as their travel destination. The results contained in this chapter therefore demonstrate the sizeable direct contribution of the cultural industry to inbound tourism in Australia.

Inbound visitors who travelled with culture as a primary motive were most likely to be from New Zealand, Europe, or North America, older, visiting friends or relatives, return visitors and in Australia for longer periods of time. Like all cultural visitors, these visitors are likely to obtain their information through word of mouth or travel brochures or agencies. They are, however, more likely than others to be influenced by the media.

## 10 Main findings

Cultural tourism is an important segment of the Australian tourism industry. Between 1 July and 31 December 1996, 60 per cent of all international visitors to Australia participated in at least one cultural activity.

- During the survey period, inbound visitors to Australia made more than 2 million visits to cultural attractions.
- In the six-month period of the survey, 371,900 visitors visited a museum or art gallery, 325,200 went to an historic site and 176,500 attended a concert or the performing arts. A further 175,700 sought experiences of Aboriginal culture, 103,800 visited an art workshop and 50,200 spent time at a festival or fair.
- Although 45 per cent of inbound visitors to cultural attractions were from the Asian continent, a higher proportion of visitors from Europe and North America sought cultural experiences while in Australia.
- During the survey period cultural visitors spent more in Australia than the average inbound visitor. On average cultural visitors spent \$2,230 each during their stay. This compares to an average of \$1,920 for all inbound visitors.
- Cultural tourists want to see and learn about the qualities and experiences that make Australia distinct. Twenty-eight per cent of inbound visitors to cultural attractions indicated that their visit provided them with an opportunity to experience something Australian. One in four visited a cultural attraction as part of their package tour.
- A decision to visit a cultural attraction by international tourists to Australia is often made on impulse, with little or no planning.
- Inbound visitors need current and timely information to be aware of cultural opportunities in Australia. They value information obtained through travel agents or travel brochures and their own social networks of family, friends, business or study colleagues or other visitors.
- Those inbound visitors who do seek cultural experiences in Australia are satisfied with their experience. Nevertheless, opportunities exist for the cultural industry to raise the levels of interest and satisfaction in some markets and arouse interest in others.

These points, and others throughout this report, clearly identify cultural tourists as a group with characteristics which can be differentiated from other travellers. Chapter 9 has illustrated, however, that while cultural visitors can be identified as a distinct market segment they should not be viewed as an homogenous group.

It is generally understood that not all visitors to cultural attractions travel with culture as their sole motive. For many in fact culture is an incidental component of their trip. In an attempt to explore this belief cultural visitors were divided into those who have a specific desire to visit a particular cultural attraction and those who visit with a general level of interest.

It is not possible from this study to determine an individual's predisposition to culture in their normal environment and how this influences what they do in Australia. What is evident, however, is that older visitors, those who stay longer or who have networks in Australia of friends, relatives, work or study colleagues or other visitors are more likely than others to visit a particular cultural site. Visitors from New Zealand, Europe or North America and return visitors are also more likely to have specific interests in culture.

While it is not within the scope of this study, it must also be recognised that inbound visitors who seek cultural experiences in Australia also seek other experiences and activities during their stay. More information on the range of activities visitors participate in, cultural and otherwise, would draw a more complete picture of the movements of cultural visitors. The need for this and other aspects of additional research has been noted at various points in the paper.

# Appendix A

## Definitions of cultural tourism

“Cultural tourism embraces the full range of experiences visitors can undertake to learn what makes a destination distinctive – its lifestyle, its heritage, its arts, its people . . .” (Commonwealth of Australia 1994, p. 99).

“In the broader sense, all movements of persons might be included in the definition because they satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters” (World Tourism Organisation 1985, p. 6).

“. . . it describes the tourist who wants some or all of the following: mixing with and meeting local people, and learning about their lifestyle and culture; seeking education as well as pleasure, using travel for personal growth; attending cultural events and venues (theatres, concerts, museums, jazz cellars, festivals); travelling widely to experience and appreciate the diversity of the built heritage and the natural environment, including national parks and wilderness areas; seeking authentic, informed, quality experiences; seeking individual involvement and varied experiences, rather than organised mass tourism” (Brokensha and Guldberg 1992, p. 3).

“Cultural tourism gives visitors the opportunity to understand and appreciate the essential character of a place and its culture as a whole including: its history and archaeology; people and their lifestyle (including the ways in which they earn a living and enjoy their leisure); cultural diversity; arts and architecture; food, wine and other local produce; social, economic and political structures; and landscape. It gives access to information, experience and activities which can help the visitor feel involved with a place, its people and their heritage . . . Cultural tourism puts emphasis on the content of what people do when they’re travelling, rather than how they actually get around and where they stay while they are there” (South Australian Tourism Commission and Department for the Arts and Cultural Development 1996, p. 1.3 to 1.4 ).

“Movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages” (World Trade Organisation 1985 p. 6).

# Appendix B

## Questionnaire

ACBMCNair

July - December 1996

NG1853  
B1 054 12

City No

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### CULTURAL MOTIVATIONS SURVEY December Quarter 1996

S.1a CHECK Q.26a  
Did respondent visit/attend any of the following?

S.1b USE RANDOM NUMBER TABLE TO SELECT ONE CULTURAL ACTIVITY FROM Q.26a.

	S.1a	S.1b
	Attended	Selected
Aboriginal Sites and cultural displays	01	03
Artists' workshops/studios	04	04
Festivals/Fairs	05	00
Performing arts/theatre	03	07
Museum/art galleries	06	06
Historic/heritage buildings, sites, monuments	09	09
None of the above attended	97	→ TERMINATE

#### → SHOWCARD C1

Q.1 Looking at Card 1, before attending/visiting the [SAY ACTIVITY/ ATTRACTION], what was your level of interest in going to the [SAY ACTIVITY/ ATTRACTION]?

Very interested	1
Fairly interested	2
Somewhat interested	3
Not interested	4

#### → SHOWCARD C2

Q.2 What factors influenced or motivated you to attend/visit the [SAY ACTIVITY/ ATTRACTION]?  
PROBE: Any other influences?

- Artists/professionals in industry . . . . . 01
- Specifically wanted to attend/visit . . . . . 01
- Attended/visited only because friends/relatives attended/visited, i.e. not personally inspired in activity/attraction . . . . . 02
- Activity/attraction was part of tour package . . . . . 04
- A break from normal schedule . . . . . 06
- To meet new friends/industry contacts . . . . . 06
- Activity/attraction provided an educational experience . . . . . 07
- To experience something Australian 08
- Interested in activity/attraction and wanted to experience with friends/relatives . . . . . 09
- To experience something new . . . . . 10
- Just wanted something to do . . . . . 11
- Image of the Activity/attraction . . . . . 12
- Friend and/or television . . . . . 13
- Something to tell my friends/relatives about . . . . . 14
- To experience something unique 16
- Other influences/motivations (PLEASE GIVE DETAILS) . . . . . 99

Q.3 Did going to the [SAY ACTIVITY/ ATTRACTION] increase your level of interest in this kind of activity/attraction in Australia?  
..... increase your level of interest?  
..... or is your level of interest unchanged?

Increased level of interest	1
Decreased level of interest	2
Interest unchanged	3



# Appendix C

## Occupation classifications

IVS		ABS classification	This report
Executive or managerial	–	Managers and administrators –Professionals	Professionals
Farmer and grazier		–Managers and administrators	Other (employed)
Teacher/lecturer	–	Professionals	Professionals
Other professional		–Professionals –Associate Professionals	Professionals
Technical (ie. technicians and Para-professional)	–	Professionals	Skilled
Skilled tradesperson workers	–	Associate professional –Tradespersons and related	Skilled
Clerical Staff workers		–Advanced clerical and service –Intermediate clerical and service	Semi-skilled
service workers		–Elementary clerical, sales and	
Salesperson and personal service worker	–	Advanced clerical and service workers –Intermediate clerical and service	Semi-skilled
workers		–Elementary clerical, sales and service workers	
Drivers and plant/machine operators		–Intermediate production and transport workers	Semi-skilled
Labourer or related worker		–Labourers and related workers	Other (employed)
Student		–N/a	Student
Home duties		–N/a	Other (not employed)
Independent means, pensioner, retired		–N/a	Other (not employed)
unemployed	–N/a		Not employed/
		Other (not employed)	

# Appendix D

## Site specific tables

A1 Factors motivating international visitors to visit cultural sites

	Aboriginal sites and cultural displays	Art or craft workshops or studios	Festivals or fairs	Performing arts or concerts	Museum or art gallery	Historic or heritage buildings, sites, monuments
	per cent	per cent	per cent	per cent	per cent	per cent
Artist or professional in industry	3	9	5	4	6	1
Specifically wanted to visit	31	30	17	52	21	12
Not interested but with friends/ relatives	2	7	13	6	9	4
Part of package tour	48	13	1	15	20	32
Break from normal schedule	1	7	26	8	5	6
Make new friends/industry contacts	1	1	2	–	–	–
An educational experience	17	18	5	7	14	9
Experience something Australian	43	39	27	11	32	23
Interested and wanted to spend time with friends/ relatives	2	9	12	13	10	11
Experience something new	17	19	17	6	12	15
Something to do	2	6	10	3	9	11
Image of the activity or attraction	8	6	11	4	3	3
Rest and relaxation	2	5	9	11	4	8
Something to tell others about	7	9	6	3	6	4
Authentic experience	18	14	5	3	8	9
Other motivations	1	4	10	6	4	20

## Appendix D (continued)

### A2 Sources of information used by international visitors to cultural sites

	Aboriginal sites and cultural displays	Art or craft workshops or studios	Festivals or fairs	Performing arts or concerts	Museum or art gallery	Historic or heritage buildings, sites, monuments
	per cent	per cent	per cent	per cent	per cent	per cent
Films and documentaries	19	14	14	1	4	6
Guidebooks and travel magazines	54	23	29	6	29	34
Travel brochures/ travel agencies	62	35	29	30	30	36
Recommended by friends/ relatives/ other visitors	31	36	46	46	32	33
Advertising	4	11	40	43	9	4
Books and other literature	16	12	1	1	26	7
Clubs and societies	-	3	12	-	2	-
Other influences	14	29	8	9	15	22

### A3 Interest in cultural sites prior to visit

	Aboriginal sites and cultural displays	Art or craft workshops or studios	Festivals or fairs	Performing arts or concerts	Museum or art gallery	Historic or heritage buildings, sites, monuments
	per cent	per cent	per cent	per cent	per cent	per cent
Very interested	61	46	38	72	52	42
Fairly interested	21	40	39	18	35	43
Somewhat interested	15	13	23	8	11	14
Not interested	3	1	-	2	2	1

## Appendix D (continued)

A4 Interest in cultural sites following visit										
	Aboriginal sites and cultural displays	Art or craft workshops or studios	Festivals or fairs	Performing arts or concerts	Museum or art gallery	Historic or heritage buildings, sites, monuments	per cent	per cent	per cent	per cent
Increased interest	61	48	68	59	53	54				
Decreased interest	1	2	4	1	2	1				
Interest changed	38	50	26	40	46	45				

A5 International visitors intention to return to cultural sites (if returned to Australia)										
	Aboriginal sites and cultural displays	Art or craft workshops or studios	Festivals or fairs	Performing arts or concerts	Museum or art gallery	Historic or heritage buildings, sites, monuments	per cent	per cent	per cent	per cent
Would attend same cultural activity		56	67	82	56	59				
62 Would attend other cultural activities	76	73	75	73	71	63				
Would not attend cultural activities	6	2	3	4	2	2				
Would not return to Australia	1	1	1	–	1	2				

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