

PLANNING FOR THE FUTURE:

A Profile of Australian Tourist Attractions

Ph.D. Thesis submitted by

Pierre Jacques Benckendorff
B.Admin (Tourism) (Hons)

in January 2004

for the degree of Doctor of Philosophy
in the School of Business
James Cook University

STATEMENT OF ACCESS

I, the undersigned, author of this work, understand that James Cook University will make this thesis available for use within the University Library and, via the Australian Digital Theses network, for use elsewhere.

I understand that, as an unpublished work, a thesis has significant protection under the *Copyright Act* and;

I do not wish to place any further restriction on access to this work.

Signed

30 January 2004

STATEMENT OF SOURCES

I, the undersigned, declare that this thesis is my work and has not been submitted in any form for another degree or diploma at any University or other institution of tertiary education.

Information derived from any sources, published and unpublished, has been acknowledged in the text and a list of references provided.

Signed

30 January 2004

Electronic Copy

I, the undersigned, the author of this work, declare that the electronic copy of this thesis provided to the James Cook University Library is an accurate copy of the print thesis submitted, within the limits of the technology available.

Signed

30 January 2004

ACKNOWLEDGEMENTS

It is sometimes difficult to anticipate the challenges that life throws at us. When I embarked on my thesis journey I was single and effectively unemployed. I now have a lovely wife who has supported me through the many hours spent in front of the computer. Thank you Kym for your patience and understanding – I hope you can forgive the strains that this work has placed on much of our time together.

I have been fortunate to get the opportunity to teach at James Cook University during much of my thesis. This has created some time management challenges but has ultimately provided me with an escape from the drudgery of thesis writing. I would like to thank all of the staff in the School of Business, and particularly the Tourism Program at JCU, for the patience, advice and the faith that they have placed in me as part of the team. I also wish to thank my students, who have shown an immense amount of respect and understanding of the time constraints that I have faced.

Thanks must go to many people who have assisted in the task of writing the thesis itself. During the research process I have met many interesting attraction managers, each of whom had an interesting tale to tell. Tourist attractions are, for me, where it all happens and I thank all of the participants who gave a little of their time to make this research possible.

The biggest vote of thanks must, however, go to my supervisor, Prof. Philip Pearce who has shown enormous amounts of patience. I have no doubt that Prof. Pearce is one of the leading tourism scholars in the world. His understanding of tourism as a field of study is unmatched and his ability to integrate concepts from other disciplines to design innovate research approaches provides a great deal of stimulation and inspiration. Despite supervising a large group of PhD students and teaching a number of undergraduate classes, Prof. Pearce has always found the time for me. He has also been an excellent mentor in terms of assisting with mapping out a research career that will extend well beyond the PhD.

I would also like to thank Robyn Yesberg, Anne Sharp, Anne Norris, Rebecca Saltzer , Barbara Woods and Amy McCoy who have provided assistance at various stages of this research. Robyn, in particular, is an excellent administrator and I have always found her subtle reminders and words of advice comforting.

ABSTRACT

Tourist attractions are frequently described as the key components of a destination's tourism industry, yet they are under-researched and poorly understood. This thesis was designed to assist tourism researchers, and potentially tourism operators, to think about the future of tourist attractions in Australia, with particular reference to planning and management. The thesis considered three areas of literature. Chapter 1 began with an overview of the definitions, classifications and current knowledge about tourist attractions. The review continued with a broad appraisal of trends that had the potential to influence tourist attractions in the next 20 to 50 years. In chapter 2, a third source of inquiry explored the strategic planning literature in an effort to examine relevant issues and common approaches to studying planning in organisations.

The review of literature resulted in nine key aims being proposed for this thesis. These aims were linked by a primary aim, which was: 'to evaluate and understand how Australian tourist attraction operators plan for the future'. To achieve the aims of this thesis a mixed method approach was used to deliver the results in three interrelated studies. In broad terms, this thesis examined (1) where Australian attractions are now; (2) how attraction operators plan for the future; and (3) what that future might entail.

Study one employed a quantitative methodology consisting of mail questionnaires to evaluate the organisational and planning characteristics of the tourist attraction sector. The results, reported in Chapters 3 and 4, provided a detailed summary of the business characteristics of attractions and confirmed anecdotal observations that the attraction sector consisted of many small operators and a small number of large well-recognised commercial attractions. The research identified four levels of planning based on the short term and long term planning focus of attractions. A key finding was that planning, whether short term or long-term, was positively associated with a number of desirable attraction characteristics. It was concluded that planners outperformed non-planners in terms of visitor numbers, visitor growth, paid employee numbers, asset value, gross

revenue, and total profit. Higher levels of planning were also associated with higher admission prices, a longer length of stay and a greater number of open days. Managers who plan also appeared to be substantially more confident about their attraction, but were also likely to have lower management tenure.

Study 2 summarised the results of a qualitative study based on twelve semi-structured interviews with attraction managers from three states along Australia's east coast. The qualitative approach, reported in Chapter 5, reinforced some of the patterns observed in the quantitative study, while adding additional detail and explanatory insight. In particular, the findings reported that there were important differences in planning between small attractions and large attractions. Large attractions tended to have more formal, systematic approaches to planning, while smaller attractions tended to adopt more casual, operational planning approach. It was found that tourist attraction planning systems contained elements of the Rational Strategic Model (RSM) of strategic planning reported in the literature, but were less formal and more operational in nature. There was a tendency for managers to continually monitor the environment rather than employing defined environment analysis tasks during the planning cycle. Monitoring of the external environment was typically focussed on the task environment (microenvironment), rather than broader environmental influences. Identity also appeared to be much more prominent in attraction planning than was suggested in the broader planning literature.

The third and final study presented in Chapter 6 used a novel futures wheel methodology to consider how trends in the medium-term future may impact on tourist attractions. The research distilled 62 trends from the futures literature and presented these to three think tanks, who were asked to rate the importance and certainty of these trends in the context of the future of Australian attractions. The most important, but least certain trends were then selected for further analysis by the think tanks. The results compared favourably with other research by confirming important attraction

trends in the areas attraction alliances, people and capacity management, enlivening attractions, increased professionalism, and balancing technology and human interaction. The findings also provided an evaluation of the strengths and limitations of the futures wheel method and suggested that, when coupled with a grounded theory approach, the technique may be suitable for investigating the future of a range of tourism contexts.

The final chapter of the thesis provided a synthesis of the results and presented an integrative model of the planning process in tourist attractions. Aspects of chapter 4 of this thesis have been published in the *Journal of Travel Research* (Benckendorff and Pearce, 2003). Highlights of the results presented in Chapters 3 and 4 were also reported to participants of the research. It is hoped that this broad overview from one continent will stimulate the further study of tourist attractions.

TABLE OF CONTENTS

CHAPTER 1: A Review of Tourist Attractions and Futures Literature	
1.1 INTRODUCTION.....	2
1.2 UNDERSTANDING TOURIST ATTRACTIONS.....	6
1.2.1 <i>An Overview of Tourist Attraction Research.....</i>	6
1.2.2 <i>Defining Tourist Attractions.....</i>	7
1.2.3 <i>Tourist Attraction Models and Frameworks.....</i>	11
1.3 CLASSIFYING TOURIST ATTRACTIONS.....	16
1.4 THE EVOLUTION OF TOURIST ATTRACTIONS.....	18
1.5 FORCES SHAPING THE FUTURE OF TOURIST ATTRACTIONS.....	22
1.6 THE MACRO-ENVIRONMENT OF ATTRACTIONS.....	24
1.6.1 <i>Socio-Cultural Trends.....</i>	25
1.6.1.1 <i>Fertility and Family Composition.....</i>	25
1.6.1.2 <i>Ageing population.....</i>	27
1.6.1.3 <i>Leisure Time.....</i>	29
1.6.1.4 <i>Cultural Diversity.....</i>	31
1.6.1.5 <i>Role of Women.....</i>	32
1.6.1.6 <i>Mind, Body and Soul.....</i>	33
1.6.2 <i>Technological Trends.....</i>	34
1.6.2.1 <i>Tourist Responses to Technology.....</i>	35
1.6.2.2 <i>Business Efficiency and Product Development.....</i>	36
1.6.2.3 <i>Geographic and Cultural Accessibility.....</i>	40
1.6.2.4 <i>Healthier Tourists.....</i>	43
1.6.2.5 <i>Marketing Applications.....</i>	45
1.6.2.6 <i>Substitute or compliment to travel?.....</i>	46
1.6.3 <i>Economic Trends.....</i>	47
1.6.3.1 <i>Globalisation.....</i>	47
1.6.3.2 <i>Economic Blocs and Political Alliances.....</i>	49
1.6.3.3 <i>Investment.....</i>	50
1.6.3.4 <i>Visitor Yield.....</i>	51
1.6.3.5 <i>Fiscal Policy.....</i>	52
1.6.4 <i>Environmental Trends.....</i>	52
1.6.5 <i>Political Trends.....</i>	55
1.6.5.1 <i>Regulation and Accreditation.....</i>	55
1.6.5.2 <i>Geopolitical Developments: Power, conflict and stability.....</i>	56
1.7 THE MICRO-ENVIRONMENT OF ATTRACTIONS.....	60
1.7.1 <i>Attraction 'Industry' Trends.....</i>	60
1.7.2 <i>Market Trends.....</i>	68
1.7.2.1 <i>Visitor numbers.....</i>	68
1.7.2.2 <i>Visitor Preferences.....</i>	70
1.8 CONCLUSION.....	74

CHAPTER 2: Business Planning Concepts and Methods	
2.1 STRATEGIC PLANNING CONCEPTS	75
2.1.1 <i>Defining Strategic Planning</i>	75
2.1.2 <i>Strategic Planning and Tourism Research</i>	76
2.2 THE EVOLUTION OF STRATEGIC PLANNING	79
2.3 MODELS OF STRATEGIC PLANNING	82
2.4 STRATEGIC PLANNING IN SMALL BUSINESSES	83
2.4.1 <i>Small Firm Planning Characteristics</i>	84
2.4.2 <i>Strategic and Operational Planning</i>	86
2.4.3 <i>Reasons for Lack of Planning</i>	86
2.5 STRATEGIC PLANNING STUDIES	88
2.5.1 <i>Strategy Process Research</i>	88
2.5.1.1 <i>Planning Formality, Sophistication and Performance</i>	89
2.5.1.2 <i>Decision Making</i>	92
2.5.1.3 <i>Employee and ‘Outsider’ Participation</i>	95
2.5.1.4 <i>Environmental Scanning and Sources of Information</i>	97
2.5.1.5 <i>Timing Considerations</i>	100
2.5.2 <i>Strategy Content Research</i>	100
2.5.3 <i>Strategy Context Research</i>	103
2.5.3.1 <i>Organisational Characteristics</i>	103
2.5.3.2 <i>Management Characteristics</i>	105
2.5.3.3 <i>Environmental Characteristics</i>	107
2.6 METHODOLOGICAL APPROACHES AND CONSIDERATIONS	109
2.6.1 <i>Planning and Formality Measures</i>	113
2.6.2 <i>Business Characteristics, Size and Performance Measures</i>	119
2.7 KEY POINTS IDENTIFIED FROM THE LITERATURE	121
2.8 THE RESEARCH PROBLEM	122
2.9 AIMS AND RESEARCH APPROACH	123
2.9.1 <i>Primary Aim</i>	123
2.9.2 <i>Mixed-Method Approach</i>	123
2.9.3 <i>Study 1: Attraction and Planning Characteristics</i>	126
2.9.4 <i>Study 2: Planning Systems in Tourist Attractions</i>	128
2.9.5 <i>Study 3: Trends Influencing the Future of the Attractions Sector</i>	129
2.10 DEFINITION OF KEY TERMS	130
2.10.1 <i>Attractions</i>	130
2.10.2 <i>Planning</i>	132
2.10.3 <i>Future</i>	132
2.10.4 <i>Time Horizon</i>	132

CHAPTER 3: An Exploratory Analysis of Tourist Attraction Characteristics	
3.1 INTRODUCTION.....	133
3.2 METHODOLOGY.....	134
3.2.1 <i>Multi-Disciplinary Approach</i>	134
3.2.2 <i>Study Aims</i>	135
3.2.3 <i>Limitations and Key Assumptions</i>	135
3.2.4 <i>Apparatus</i>	136
3.2.5 <i>Procedure</i>	138
3.2.6 <i>Sample</i>	139
3.2.6.1 <i>Subjects</i>	139
3.2.6.2 <i>Profile of Responses</i>	141
3.2.6.3 <i>Attraction Type</i>	141
3.2.7 <i>Data Analysis</i>	143
3.2.7.1 <i>Parametric and Non-Parametric Data</i>	143
3.2.7.2 <i>Treatment of Statistical Outliers</i>	145
3.3 TOURIST ATTRACTION CHARACTERISTICS	146
3.3.1 <i>Aim One</i>	146
3.3.2 <i>Attraction Size</i>	147
3.3.2.1 <i>Visitor Numbers</i>	147
3.3.2.2 <i>Visitor Growth</i>	147
3.3.2.3 <i>Financial Size</i>	150
3.3.2.4 <i>Employment</i>	154
3.3.3 <i>Income Characteristics</i>	156
3.3.3.1 <i>Revenue Sources</i>	156
3.3.3.2 <i>Admission Prices</i>	157
3.3.4 <i>Market Characteristics</i>	159
3.3.4.1 <i>Length of Stay</i>	159
3.3.4.2 <i>Market Origin</i>	160
3.3.4.3 <i>Market Access</i>	161
3.3.4.4 <i>Group Visitation</i>	162
3.3.5 <i>Attraction Age</i>	163
3.3.5.1 <i>Attraction Age</i>	163
3.3.5.2 <i>Tenure of Current Management</i>	164
3.3.6 <i>Attraction Performance</i>	165
3.3.6.1 <i>Objective measures of performance</i>	165
3.3.6.2 <i>Subjective measures of performance</i>	166
3.4 ENVIRONMENTAL CHARACTERISTICS	171
3.5 SUMMARY OF FINDINGS	175

CHAPTER 4: Strategic Planning in the Australian Tourist Attractions Sector	
4.1 INTRODUCTION.....	179
4.2 PLANNING CHARACTERISTICS OF THE ATTRACTION SECTOR.....	180
4.2.1 <i>Aim Two</i>	180
4.2.2 <i>Planners and Non-Planners</i>	180
4.2.2.1 <i>Reasons for Planning</i>	180
4.2.2.2 <i>Reasons for not planning</i>	182
4.3 THE PLANNING PROCESS	183
4.3.1 <i>Planning Horizon</i>	183
4.3.2 <i>Planning Responsibility</i>	183
4.3.3 <i>Plan Availability</i>	184
4.3.4 <i>Sources of Information</i>	184
4.3.5 <i>Planning Assistance</i>	185
4.3.6 <i>Planning Sophistication</i>	186
4.4 PLAN CONTENT	188
4.4.1 <i>Strategic Focus</i>	188
4.4.2 <i>Environmental Forces</i>	189
4.5 LINKS BETWEEN ATTRACTION CHARACTERISTICS AND PLANNING	190
4.5.1 <i>Aim Three</i>	190
4.5.2 <i>Attraction Type</i>	190
4.5.3 <i>Attraction Size</i>	191
4.5.3.1 <i>Visitor Numbers</i>	191
4.5.3.2 <i>Visitor Growth</i>	192
4.5.3.3 <i>Number of Paid Employees</i>	192
4.5.3.4 <i>Financial Size</i>	193
4.5.3.5 <i>Planning Sophistication and Attraction Size</i>	194
4.5.3.6 <i>Conclusions</i>	196
4.5.4 <i>Income Characteristics</i>	197
4.5.4.1 <i>Sources of Revenue</i>	197
4.5.4.2 <i>Admission Charges</i>	198
4.5.5 <i>Market Characteristics</i>	199
4.5.5.1 <i>Length of Stay</i>	199
4.5.5.2 <i>Market origin</i>	200
4.5.5.3 <i>Market Access</i>	200
4.5.5.4 <i>Group Visitation</i>	201
4.5.6 <i>Attraction Age and Management Tenure</i>	201
4.5.7 <i>Performance and Planning</i>	202
4.5.7.1 <i>Objective Measures of Performance</i>	202
4.5.7.2 <i>Subjective Measures of Performance</i>	203
4.5.7.3 <i>Planning Period and Performance</i>	204
4.5.7.4 <i>Planning Responsibility and Performance</i>	204
4.5.7.5 <i>Planning Assistance and Performance</i>	204
4.5.7.6 <i>Planning Sophistication and Performance</i>	205
4.5.7.7 <i>Conclusions</i>	206
4.5.8 <i>Environmental Complexity and Planning</i>	206
4.5.8.1 <i>Environmental Complexity and Planning Sophistication</i>	207
4.5.8.2 <i>Conclusions</i>	208
4.6 SUMMARY OF FINDINGS	209
4.6.1 <i>Planning Characteristics</i>	209
4.6.2 <i>Relationship between Planners and Non-Planners</i>	210

CHAPTER 5: Planning Systems in Australian Tourist Attractions

5.1 INTRODUCTION.....	213
5.2 METHODOLOGY.....	214
5.2.1 Overview	214
5.2.2 Procedure	214
5.2.3 Apparatus.....	215
5.2.4 Sample.....	217
5.2.5 Data Validity.....	218
5.2.6 Data Analysis.....	219
5.3 RESULTS AND DISCUSSION	220
5.3.1 Pilot Study.....	220
5.3.2 Attraction Background.....	220
5.3.3 Management Background.....	221
5.3.4 Perceptions of Planning.....	224
5.3.4.1 Vision	225
5.3.4.2 Budgets and resources.....	225
5.3.4.3 Identity and Core Business.....	226
5.3.4.4 Customers and community.....	228
5.3.4.5 Management and Entrepreneurship.....	229
5.3.4.6 SWOT analysis, strategies and goals.....	229
5.3.4.7 Logistics.....	230
5.3.5 The Planning Process.....	231
5.3.5.1 Key planning tasks.....	231
5.3.5.2 Objectives, strategies	232
5.3.5.3 Setting KPIs and evaluating performance.....	232
5.3.5.4 Environmental analysis and monitoring.....	235
5.3.5.5 Formality and timing of planning.....	237
5.3.5.6 Planning Meetings and Idea Generation.....	238
5.3.5.7 Time devoted to planning tasks.....	240
5.3.5.8 Flexibility and Review	241
5.3.5.9 Attraction Size and Planning Processes.....	243
5.3.6 Participation in Planning Activities.....	243
5.3.6.1 Board of Directors / Trustees.....	244
5.3.6.2 Senior Management	245
5.3.6.3 Employees and Volunteers.....	246
5.3.6.4 External Assistance	248
5.3.6.5 Information Sources.....	249
5.3.6.6 Own Research	249
5.3.6.7 Tourism Industry Intelligence and Networking.....	250
5.3.6.8 Competitors, collaboration, benchmarking and best practise.....	251
5.3.6.9 Consultancies and Education Institutions.....	252
5.3.7 Importance of Planning.....	253
5.3.8 Planning and Attraction Size.....	255
5.3.9 The Future of Attractions	259
5.3.9.1 Socio-cultural changes	260
5.3.9.2 Technological change.....	261
5.3.9.3 Economic change	262
5.3.9.4 Environmental change.....	262
5.3.9.5 Political change.....	262
5.3.9.6 Attraction Trends	263
5.3.9.7 Market Trends.....	266
5.4 CONCLUSIONS.....	267

CHAPTER 6: Australian Tourist Attraction Futures

6.1 INTRODUCTION.....	271
6.2 METHODOLOGY.....	272
6.2.1 <i>The Futures Wheel</i>	272
6.2.2 <i>Procedure and Apparatus</i>	275
6.2.3 <i>Sample</i>	278
6.2.4 <i>Data Analysis</i>	279
6.3 RESULTS	282
6.3.1 <i>Overview of Results</i>	282
6.3.2 <i>Importance and Certainty Ratings of Trends</i>	282
6.3.2.1 <i>Importance of Trends</i>	282
6.3.2.2 <i>Certainty of Trends</i>	284
6.3.3 <i>Analysis of the Futures Wheels</i>	286
6.3.4 <i>Overview of Trends Selected by the Think Tanks</i>	287
6.3.5 <i>Attraction Management Themes and Concepts</i>	290
6.3.5.1 <i>Changes to Attraction Infrastructure and Activities</i>	292
6.3.5.2 <i>Changes to Visitor Management</i>	300
6.3.5.3 <i>Changes to Attraction Marketing</i>	303
6.3.5.4 <i>Changes to Attraction Operations</i>	304
6.3.5.5 <i>Changes to Attraction Sustainability</i>	306
6.3.5.6 <i>Changes to Attraction Pricing and Financial Resources</i>	308
6.3.5.7 <i>Changes to Attraction Training and Human Resources</i>	311
6.3.5.8 <i>Changes to Attraction Management Structure and Organisation</i>	311
6.3.5.9 <i>Changes to Attraction Research</i>	311
6.3.6 <i>Summary of Attraction Management Themes and Concepts</i>	312
6.4 DISCUSSION.....	312
6.4.1 <i>Similarities in Future Trends, Themes and Management Implications</i>	313
6.4.1.1 <i>Attraction Alliances</i>	315
6.4.1.2 <i>People and Capacity Management</i>	316
6.4.1.3 <i>Enlivening attractions</i>	317
6.4.1.4 <i>Increased Professionalism</i>	317
6.4.1.5 <i>Balancing Technology and Human Interaction</i>	318
6.4.1.6 <i>Niche Markets</i>	318
6.4.1.7 <i>Sophisticated and Aggressive Marketing</i>	318
6.4.1.8 <i>Attraction Pricing</i>	319
6.4.2 <i>Contrasts between the literature and the futures wheel approach</i>	320
6.4.3 <i>An Evaluation of the Futures Wheel Method</i>	321
6.4.3.1 <i>Practical Challenges of Using the Futures Wheel</i>	321
6.4.3.2 <i>Strengths and Limitations</i>	323

CHAPTER 7: Conclusions and Recommendations	
7.1 INTRODUCTION.....	329
7.2 TOURIST ATTRACTION CHARACTERISTICS	330
7.3 PLANNING CHARACTERISTICS OF THE ATTRACTION SECTOR.....	332
7.4 PLANNING SYSTEMS IN AUSTRALIAN TOURIST ATTRACTIONS	337
7.5 AUSTRALIAN TOURIST ATTRACTION FUTURES	346
7.6 RESEARCH LIMITATIONS.....	352
7.7 FURTHER RESEARCH.....	354
7.8 THESIS CONCLUSION.....	357

LIST OF FIGURES

CHAPTER 1: A Review of Tourist Attractions and Futures Literature	
FIGURE 1.1: Model of the research approach	4
FIGURE 1.2: Concentric rings model of a tourist attraction	11
FIGURE 1.3: A model of tourist attraction	12
FIGURE 1.4: The three levels of a product	13
FIGURE 1.5: Classification of Attractions.....	17
FIGURE 1.6: Classifying tourist attractions	17
CHAPTER 2: Business Planning Concepts and Methods	
FIGURE 2.1: The evolution of strategic management.....	80
FIGURE 2.2: Forms of strategy	81
FIGURE 2.3: Three levels of Environmental Analysis	98
FIGURE 2.4: The stakeholder web of the small firm.....	104
FIGURE 2.5: Strategic choice under conditions of bounded rationality	106
CHAPTER 3: An Exploratory Analysis of Tourist Attraction Characteristics	
FIGURE 3.1: Distribution of visitor numbers in Australian attractions	147
FIGURE 3.2: Visitor numbers/visitor growth matrix for attraction categories	148
FIGURE 3.3: Mean total profit/mean asset value matrix for attraction categories	148
FIGURE 3.4: Mean gross revenue/mean asset value matrix for attraction categories	152
FIGURE 3.5: Mean total profit/mean gross revenue matrix for attraction categories	153
FIGURE 3.6: Volunteers/paid employees matrix for attraction categories.....	155
FIGURE 3.7: Mean admission prices for adults, children and concessions split by attraction type	158
FIGURE 3.8: Visitor numbers/length of stay matrix for attraction categories.....	159
FIGURE 3.9: Origin of visitors based on attraction type.....	161
FIGURE 3.10: Number of open days per week for all attractions	161
FIGURE 3.11: Visitor numbers/open days per week matrix for attraction categories.....	162
FIGURE 3.12: Visitor numbers/group visitation matrix for attraction categories	163
FIGURE 3.13: Attraction age/management tenure matrix for attraction categories.....	164
FIGURE 3.14: Cumulative chart of perceived attraction performance	167
FIGURE 3.15: Aggregate size, growth and social responsibility performance ratings by attraction type	170
FIGURE 3.16: Cumulative bar chart of environmental characteristics	171
FIGURE 3.17: Aggregate environmental complexity ratings split by attraction type.....	174
CHAPTER 4: Strategic Planning in the Australian Tourist Attractions Sector	
FIGURE 4.1: Four levels of planning.....	190
FIGURE 4.2: Sophistication/visitor numbers matrix for attraction categories	195
FIGURE 4.3: Sophistication/Visitor growth matrix.....	196
CHAPTER 5: Planning Systems in Australian Tourist Attractions	
<i>No Figures.</i>	

CHAPTER 6: Australian Tourist Attraction Futures

FIGURE 6.1: The basic futures wheel concept 274

FIGURE 6.2: The importance / certainty matrix 276

FIGURE 6.3: Trends Identified by think tanks for further exploration..... 289

FIGURE 6.4: Examples showing the need for variety and diversity in attractions 293

FIGURE 6.5: Comments about attraction facilities for the family market..... 296

FIGURE 6.6: Comments about the use of technology in tourist attractions..... 297

FIGURE 6.7: Use of technology infrastructure to manage visitors..... 298

FIGURE 6.8: Implications of global warming for tourist attraction infrastructure
and activities 299

FIGURE 6.9: Implications for managing cultural sensitivity and diversity in
tourist attractions..... 301

FIGURE 6.10: Managing visitor flows in tourist attractions. 302

FIGURE 6.11: Improved marketing in tourist attractions..... 303

FIGURE 6.12: The need for target marketing in tourist attractions. 304

FIGURE 6.13: Increased professionalism in tourist attractions..... 305

FIGURE 6.14: Sustainability changes in tourist attractions..... 307

FIGURE 6.15: Precedents and implications related to admission prices..... 308

FIGURE 6.16: Changes in the financial resources of tourist attractions. 310

CHAPTER 7: Conclusions and Recommendations

FIGURE 7.1: Framework for planning in tourist attractions..... 339

FIGURE 7.2: A longitudinal timeline of integrated planing in tourist attractions..... 341

LIST OF TABLES

CHAPTER 1: A Review of Tourist Attractions and Futures Literature

TABLE 1.1: Definitions of tourist attractions.....	8
TABLE 1.2: The Elements of a Successful Tourist Attraction	14
TABLE 1.3: Tourist Attraction Classification Schemes	16
TABLE 1.4: Summary of leading trends in tourist attractions	61
TABLE 1.5: Contrasting integrated leisure attractions and traditional attractions.....	63
TABLE 1.6: Changes in tourism market trends.....	72

CHAPTER 2: Business Planning Concepts and Methods

TABLE 2.1: Recent definitions in the Strategic Management literature	76
TABLE 2.2: Business planning-related studies in the tourism and hospitality literature	77
TABLE 2.3: Key strategic planning tasks for organisations	83
TABLE 2.4: Common decision-making traps	93
TABLE 2.5: Common strategy types and their content.....	101
TABLE 2.6: Selected planning and organisational characteristics studies	110
TABLE 2.7: Selected studies exploring planning, organisational environment and environmental scanning	110
TABLE 2.8: Selected Planning and Business Performance / Success Studies.....	111
TABLE 2.9: Classification schemes for assessing planning formality and sophistication...	116
TABLE 2.10: Common business measures used by key strategic planning studies	120
TABLE 2.11: Study 1 Research Questions	127
TABLE 2.12: Study 2 Research Questions	128
TABLE 2.13: Study 3 Research Questions	129

CHAPTER 3: An Exploratory Analysis of Tourist Attraction Characteristics

TABLE 3.1: State by state comparison of attraction numbers, population and visitor numbers.	140
TABLE 3.2: Response rates to tourist attraction questionnaire	141
TABLE 3.3: Comparison of responses by attraction type	142
TABLE 3.4: Parametric and Non-parametric tests employed in the study.....	144
TABLE 3.5: Descriptive statistics for financial measures of attraction size.....	150
TABLE 3.6: Number of employees for all attractions.	154
TABLE 3.7: Revenue sources (percentage) for all attractions.	156
TABLE 3.8: Descriptive statistics for attraction admission prices	157
TABLE 3.9: Descriptive statistics for market origin	160
TABLE 3.10: Descriptive statistics for financial performance measures.....	165
TABLE 3.11: Comparison of financial performance benchmarks	166
TABLE 3.12: Factor Analysis for perceived performance rating scales.....	168
TABLE 3.13: Rotated factor correlation matrix for perceived performance scales	168
TABLE 3.14: Aggregate statistics for size, growth and social responsibility performance factors	169
TABLE 3.15: Friedman results for size, growth and social responsibility performance factors	169

TABLE 3.16: Factor Analysis for business environment rating scales.....	172
TABLE 3.17: Rotated factor correlation matrix for business environment rating scales.....	173
TABLE 3.18: Aggregate statistics for environmental competition, change and confidence factors	173
TABLE 3.19: Friedman results for environmental competition, change and confidence factors	173
TABLE 3.20: Summary of tourist attraction characteristics.....	176
TABLE 3.21: Summary of attraction characteristics by attraction type	177

CHAPTER 4: Strategic Planning in the Australian Tourist Attractions Sector

TABLE 4.1: Reasons for developing a long-term plan.....	181
TABLE 4.2: Reasons for not developing a long-term plan	182
TABLE 4.3: Length of period covered by long-term plans	183
TABLE 4.4: Information sources used by tourist attraction planners	184
TABLE 4.5: Sources of planning assistance	186
TABLE 4.6: Execution of specific planning activities by attraction managers.....	186
TABLE 4.7: Calculated planning sophistication levels for Australian tourist attractions	187
TABLE 4.8: Planning strategies and environmental forces included in long-term plans	188
TABLE 4.9: Cross-tabulation of attraction types and planning level.....	191
TABLE 4.10: Kruskal-Wallis test for measures of size and level of planning.....	192
TABLE 4.11: Kruskal-Wallis test results for revenue sources and level of planning	197
TABLE 4.12: Kruskal-Wallis test results for admission prices and level of planning	198
TABLE 4.13: Kruskal-Wallis results for statistically significant market characteristics and level of planning	199
TABLE 4.14: Kruskal-Wallis results for management tenure and level of planning.....	202
TABLE 4.15: Means for financial ratios based on level of planning.....	202
TABLE 4.16: One-way ANOVA results for perceived performance factors and planning level	203
TABLE 4.17: Mann-Whitney results for financial performance and planning assistance	205
TABLE 4.18: T-test results for subjective performance measures and planning sophistication	205
TABLE 4.19: Oneway ANOVA results for environmental confidence and planning level.....	206
TABLE 4.20: T-test results for subjective performance measures and planning sophistication	207
TABLE 4.21: Summary of planning characteristics in Australian Attractions.....	210
TABLE 4.22: Summary of the relationship between attraction characteristics and planning	211

CHAPTER 5: Planning Systems in Australian Tourist Attractions

TABLE 5.1: Study 2 Interview Questions and relevant links to literature.....	216
TABLE 5.2: Characteristics of tourist attractions participating in the study.....	218
TABLE 5.3: Level of similarity for three sample transcripts.....	219
TABLE 5.4: Career background of interviewees	221
TABLE 5.5: Themes identified from management perceptions of planning.....	224
TABLE 5.6: Key planning tasks mentioned by tourist attraction managers	232
TABLE 5.7: Visitor-related performance measures used by attractions in evaluating performance.....	233
TABLE 5.8: Time horizon and formality of written plans	237

TABLE 5.9:	Contents of SR2 Operational Procedures Manual	238
TABLE 5.10:	Frequency of planning meetings at various organisational levels	239
TABLE 5.11:	Estimates of the amount of time managers spent on planning tasks.	240
TABLE 5.12:	Involvement of staff and external stakeholders in planning activities.	244
TABLE 5.13:	Involvement of general attraction staff in planning activities	247
TABLE 5.14:	Most common sources of information for planning decisions.....	249
TABLE 5.15:	Most useful aspects of planning identified by attraction managers.	253
TABLE 5.16:	Themes of attraction manager perceptions of the future.....	260
CHAPTER 6: Australian Tourist Attraction Futures		
TABLE 6.1:	Composition of think tanks.....	278
TABLE 6.2:	Top 10 Most and Least Important Trends.....	283
TABLE 6.3:	Top 10 Most Certain and Least Certain Trends	285
TABLE 6.4:	Core categories and themes distilled from an analysis of futures wheel comments.....	290
TABLE 6.5:	A description and illustration of the nine key tourist 'attraction change' themes	291
TABLE 6.6:	A description and illustration of the nine key tourist attraction management themes	312
TABLE 6.7:	Comparison of futures wheel themes with literature and interview responses.	314
TABLE 6.8:	Strengths and Weaknesses of the Futures Wheel as a Research Method.....	323
CHAPTER 7: Conclusions and Recommendations		
TABLE 7.1:	Summary of the major achievements of this thesis	358