Economic Value of Tourism to Places of Cultural Heritage Significance

A Case Study of Three Towns with Mining Heritage

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This project was carried out by researchers in the Tourism Program at the University of Canberra, and was jointly funded by the Cooperative Research Centre for Sustainable Tourism and the Australian Heritage Commission. All views expressed are those of the authors.

The findings of this research are based upon the authors' interpretations of the material collected and data from the surveys. All attempts have been made to ensure the accuracy of both the results and the interpretation. However, other interpretations may be possible from this information. It is the responsibility of the reader to draw their own conclusion from the data and from this report.

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EXECUTIVE SUMMARY

This exploratory study of tourism to three heritage Australian mining towns has aimed to measure the economic impact of such tourism on the host regions and to learn more about the motivations and behaviour of visitors to the towns. Greater understanding of such factors provides necessary input into the management and conservation of similar heritage places.

The release of the Commonwealth Government's 'Draft Heritage Tourism Guidelines' (1999) has increased the focus on the importance of cultural heritage tourism. This document highlighted a number of case studies which illustrated the interest in visitation to places of cultural heritage significance. The document also raised such issues as the sustainability of cultural heritage tourism and the capacity of the tourism industry to generate sustainable economic growth.

In this study, three heritage mining towns were chosen, in consultation with the Australian Heritage Commission. One advantage of choosing mining towns for the study is that of homogeneity, i.e. visitors' motivations, expectations and attitudes would not vary between the places because of the industrial background. The towns were chosen by the Australian Heritage Commission partly for their known heritage value (i.e. known to the Commission), and partly because of their established attractiveness to tourists.

The three towns eventually chosen for study were:

- Maldon, a former gold mining town in Victoria;
- Burra, a former copper mining town in South Australia; and
- Charters Towers, a gold mining town in north Queensland.

During the first six months of 2000, face-to-face interviews were conducted in each town. The interviews sought information on visitor characteristics, behaviour, expenditure, attitudes to aspects of cultural heritage and satisfaction. Expenditure data were used to measure the impact of tourism upon regional economic activity, with the following results:

Table E.1 Economic Impact of Tourism

	Maldon	Burra	Charters Towers
Annual visitor numbers	41 868	40 913	69 917
Expenditure per head ($)	102.06	109.45	87.77
Aggregate expenditure ($)	4 272 981	4 477 850	6 136 726
Gross regional product (GRP) impact ($)	3 820 880	4 810 995	6 127 729
Employment impact (jobs)	310	333	121

A large number of visitors to Charters Towers are passing through on their way west. This has the effect of reducing the average per person expenditure in Charters Towers. The relatively low employment impact in the northern region of Queensland is due to the low labour intensity of some of the industries in the region. Agriculture, which has a high land intensity, is one example; food processing, which has a high capital intensity, is another.

The available economic models are not capable of telling us what the economic impact of tourism is on the host towns themselves. The impacts in Table E.1 refer to quite large geographical regions which are defined by the Australian Bureau of Statistics as Statistical Divisions.

In all regions except Burra, the leakage of activity caused by goods and services supplied by other regions means that the impact on regional incomes (gross regional product, or GRP) is less than the visitor expenditure. In other words, the tourism economic multiplier is effectively less than one. This is a common outcome even at the State level, and also sometimes at the national level.

Nevertheless, the $4 million to $6 million of economic impact from tourism is clearly significant in the context of regional economic development. In each case, the impact of tourism to these towns alone is worth about 0.05 per cent of the total economic activity of the region, and it is worth noting that in each case tourism to the chosen *towns* is only part of tourism to the *region*. It is beyond the scope of this study to estimate the total value of tourism to each of the *regions*.

In addition, there is the potential for this flow of money to provide a source of funds to pay for the preservation of the heritage assets. The challenge is for local tourism and heritage managers to cooperatively find ways of tapping into this revenue source.

A key aspect of this study is the interest that visitors have in various attributes of cultural heritage. In particular, there is interest in knowing whether visitors have a preference for information, entertainment, authenticity or education. Prior to the study, there was an expectation that visitors might also be interested in destinations where children's entertainment is available. Of course, it is worth noting that since these destinations are not child targeted facilities, there may be an element of self-selection: visitors who have a need for children's entertainment may be more likely to be found at other destinations which already have such facilities.

In Table E.2, the mean score for each attribute in each destination is shown. The attributes have been ranked on a scale of 1 to 5, where 5 is 'very important' and 1 is 'not at all important'. The patterns are very similar in each destination, with 'seeing' attributes being more important than 'learning' attributes. There is clearly not a strong demand for children's entertainment or for having a guide. While there is some emphasis on interaction, it is less important than seeing and learning.

The evidence from this indicates that cultural heritage is equated with ‘preserved old buildings’. That is, it is seen as a tangible thing rather than an intellectual or abstract concept such as lifestyle, commercial organisation or social behaviour. Again, there may be an element of self-selection at work, in that the chosen places for the study all feature strong themes of well-preserved buildings and streetscapes rather than themes of lifestyle or social and commercial behaviour.

Table E.2 Important Attributes in Heritage Mining Areas

	Score		
	Maldon	Burra	Charters Towers
Having children’s entertainment available	2.74	3.22	3.14
Helping my children learn more about Australia	3.06	3.78	3.66
Having a guide explain things	3.32	3.75	3.77
Learning about the history of mining	3.47	3.86	4.03
Having interpretive information available	3.90	4.22	4.27
Being able to interact with exhibits	3.97	4.00	4.05
Learning about what life was like back then	4.17	4.43	4.35
Learning more about Australia’s past	4.22	4.50	4.40
Learning more about Australia’s heritage	4.24	4.42	4.41
Experiencing a different environment	4.34	4.37	4.44
Seeing an aspect of Australia’s heritage	4.49	4.49	4.51
Seeing well-preserved, old buildings	4.61	4.60	4.57

Visitors in all three towns rated things like peace and quiet, well-maintained attractions, good amenities and visitor information as highly important. In all three places there was more interest in brief summaries of a location’s offerings than there was in whether a trained guide or a star ratings system of heritage significance was available.

A point of particular interest emerging from the survey was the high rating that tourists gave to the provision of information about national listing of a site. A search of the literature was unable to find any definitive published work on the value of a national list. In the United Kingdom, there is clear evidence that National Trust properties enjoy high levels of visitation. There is also evidence that international tourists in Australia exhibit a significant level of interest in cultural heritage attractions. However, there is no clear evidence of what impact would flow from the development of a list of highly significant heritage locations.

Table E.3 Ratings of Useful Information Types

	Percentage		
	Maldon	Burra	Charters Towers
Brief summaries of each location’s offerings	91	83	76
Designated list of Australian National Heritage places	74	62	69
Indication of how much time should be spent	50	55	39
A heritage ratings system (4 stars etc.)	47	35	37
Availability of a trained guide	32	44	43
Other	11	8	7

Information from the towns surveyed in this study and from what is known about locations on the World Heritage list suggest that factors other than listing may be important. Accessibility, marketing activities and the flow of information about locations all appear to be important determinants. Nevertheless, it is clear from surveys reported in this study that national listing would be a very important source of information for people interested in visiting cultural heritage attractions.

CHAPTER 1 INTRODUCTION

1.1 Cultural Heritage Tourism and Regional Economic Development

This study reports on the economic value[1] of cultural heritage tourism and the potential for raising such value by the development of a national list of places of cultural heritage significance. The study reports the results of visitor surveys at three Australian heritage mining towns where tourism development has occurred in a variety of ways. The towns all feature assets which were legacies of mining booms in the nineteenth century. The surveys estimated the expenditure by tourists and the associated economic impact. This report also includes a section on the potential value of listing places of cultural heritage significance on a national list.

There is a well-established body of knowledge about the value of tourism to *natural* heritage places. Studies such as McDonald and Wicks (1986) and Pearson, Russell and Woodford (2000) have detailed the economic impact of visitor spending which is related to visitation to places of natural heritage. However, the area of cultural heritage has been somewhat neglected and is only just beginning to receive attention.

The release of the Commonwealth Government's draft guidelines 'Draft Heritage Tourism Guidelines' (1999) brought the importance of cultural heritage tourism into increasing focus. The document highlighted a number of case studies which illustrated the interest in visitation to places of cultural heritage significance. The document also raised such issues as the sustainability of cultural heritage tourism and the capacity of the tourism industry to generate sustainable economic growth.

Many of Australia's historic heritage assets are located in non-metropolitan regional Australia where the contribution of cultural tourism to economic growth is of great importance, as well as being of policy significance. In addition, although Australia's non-Indigenous cultural assets are only 200 years old, they represent important icons and appear to contribute to a sense of national identity.

Early European development in Australia was based around three main industries: the convict system, farming and mining. Many of the constructed assets of these industries have survived and are now tourist attractions. Examples include Port Arthur, the Victorian goldfields and the Cockle Train in South Australia.[2] In each case, tourism has become an important reason for the continued preservation and maintenance of the asset, as well as an important source of revenue for such maintenance.

[1] The issues of economic impacts and economic values of tourism are discussed more fully in Appendix A.
[2] This is claimed to be Australia's first railway line and was originally horse-drawn, and used for grain transport.

An item of importance to this study is the money that is brought into a regional economy by the tourists who come to see the preserved heritage. Expenditure by visitors on accommodation, meals, site entry fees, shopping, petrol and other transport puts income into the hands of local businesses and their employees. Such regional economic development is valuable at a time when traditional farming industries may be in decline or in regions where global economic adjustment has resulted in closures of banks, transport or other local industries.

Sustainable regional economic development requires that tourism numbers to such places remain consistent and that tourist expenditure is sustained. The attractions need to be conserved and maintained, visitors need to be satisfied with their experience, and resources need to be devoted to informing potential visitors about the attractions on offer. Sustainability requires that tourism to such places leaves the assets in good condition so that they are able to be enjoyed by future visitors.[3]

Wherever possible, resources for maintenance and for promotion must be found from the expenditure of the visitors. This adds to the sustainability of the total product, and reduces the regional dependence on government budgets, which are becoming increasingly tight.

While this study does not canvass the techniques which might be used to tap into tourism expenditure for the purposes of financing preservation of cultural heritage assets, it does illustrate the potential for such revenue, by measuring the flow of tourism expenditure dollars.

1.2 The Value of Tourism to Heritage Mining Places

The concept of the total economic value of something (assets, goods or services) has received a good deal of attention in the field of the economics of natural areas (IUCN 1998). Parks, beaches, rainforests, reefs etc. have values to society that are not all captured by commercial exchange of money. Figure 1.1 depicts the various elements that comprise total economic value.

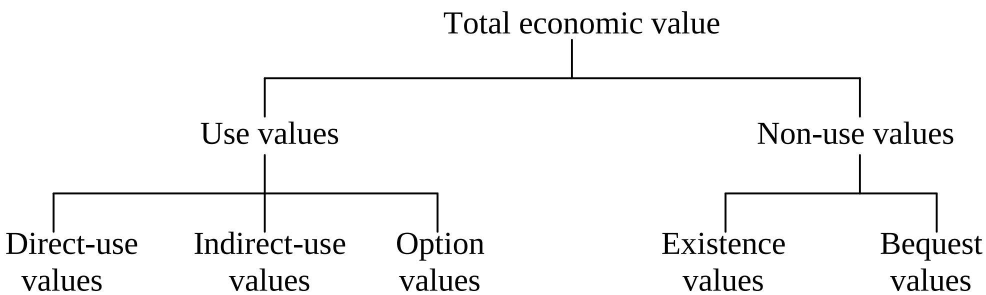
The total economic value comprises value in use, plus non-use values. Use values include current commercial production (direct-use values) and multiplier effects (indirect-use values). Tourism is included here. Option values refer to the amount of value that the community places on the prospect of future use of an asset. Thus tourists who have not yet visited the Barrier Reef may want it preserved so that they have the option of visiting it in the future.

[3] Sustainability in this context refers to long-term continuance of the environmental, social and economic assets. Thus the heritage values are sustained, for without them there would be less interest from tourists and therefore less economic impact from tourism. Maintenance of the cultural values of the assets preserves both their tourism attractiveness and the economic viability of the tourism industry.

Non-use values comprise existence values and bequest values and capture, respectively, the notion that people who never intend to use a resource may still value its existence and the notion that people may value a resource because they wish to leave a legacy or bequest to future generations. Thus, people who never envisage visiting Antarctica may still feel that the continent should be conserved because they derive pleasure from knowing that the wilderness will continue to exist, or from knowing that it is still preserved for future generations.

Historical Australian mining towns embody elements of post-European Australian heritage. Their historical components are, therefore, likely to have non-use values as well as use values. However, it should be noted that this study is limited to use values (both direct and indirect) from tourism. As such, this study does not measure the total economic value of historical mining towns. Each town will have use value in addition to tourism, such as value as a rural service centre, and may have option value, existence value, and bequest value because of heritage significance. It should be emphasised that the historical component of each town also has non-use values.

Figure 1.1 Elements of Total Economic Value



Source: IUCN (1998).

As discussed previously, mining is one of three industries which were pivotal to early European economic development of Australia. The mineral booms of the mid-1800s attracted large numbers of new settlers into regions across the nation. The wealth from mining helped finance the construction of residential and commercial buildings in towns which, today, have smaller populations than in their boom times. Many of these buildings – as well as the diggings, railway lines, mining plant and streetscapes installed at the same time – have been left intact and have become tourism attractions.

Three heritage mining towns were chosen in this study, in consultation with the Australian Heritage Commission. One advantage of choosing mining towns for the study is that of homogeneity. This is, peoples' motivations for visiting, and expectations about and attitudes towards each place, would not vary significantly because of their similar historical/industrial backgrounds. One could imagine that a study which instead included a former penal colony alongside a former river grain port might discover variations due to the different industrial backgrounds of the two destinations.

The three towns eventually chosen for study were:

1. Maldon, a former gold mining town in Victoria;
2. Burra, a former copper mining town in South Australia; and
3. Charters Towers, a gold mining town in north Queensland.

All three towns once boomed as a result of mineral wealth, which has long since run out. All three have well-preserved buildings and other reminders of the boom times. In all three, these have been preserved and now attract tourists who are interested in experiencing part of Australia’s historical development.

Visitor surveys were conducted in these towns using face-to-face interviews. Attitudinal and behavioural tourism data were sought, as well as expenditure data. The latter were used to estimate the economic impact of tourism on each town, where ‘economic impact’ was measured in terms of gross regional product and employment.

It should be noted that this is not a cost-benefit study. The emphasis is on the use value only of visitors, and the cost of preserving the visitor attractions has not been accounted for. No case is being made here for public or private spending on developing tourism to regions which have heritage attractions. While a large part of this study is essentially a measurement exercise, some may wish to use the data in a broader context. For this reason, a discussion of the economics of the broader issue of costs and benefits is given in Appendix A.

The method used to calculate economic impact is different from the methods often used to measure use value when there is no market price. Techniques such as travel cost or contingent valuation are commonly used by economists to put dollar figures on the value of non-marketed goods and services. However, as Burgan and Mules (2000) have pointed out, in tourism applications such approaches are measuring the value of the goods or services to non-residents; as such, they do not assist decision making about value to residents. This issue is considered further in Appendix A.

It should also be noted that the economic impact variable gross regional product (GRP) is not a gross turnover measure; it is, in fact, value added at factor cost. This is exactly the same concept as the national variable gross domestic product at factor cost. There is no double counting in this measure; intermediate inputs have been removed.

CHAPTER 2 SAMPLING METHODOLOGY

2.1 General Principles

There are two main statistical criteria for sample survey design. The first is that the process be unbiased, the second that it be efficient. In practice, cost effectiveness is also a desirable – and often necessary – characteristic. The absence of bias is determined by random sampling, so that all members of the target group (referred to as 'the population') have an equal chance of being selected. The term 'representative' is often used in this context, as in the phrase 'the sample is representative of the whole population'.

Bias could occur if the attributes of a certain group operated against members of that group being selected in the sample. An example would be door-to-door sampling on a Sunday morning when churchgoers are unlikely to be at home. The survey results would, therefore, be biased away from Sunday churchgoers and their characteristics.

Efficiency is measured by the standard error[4] of the sample mean, and is a function of the underlying variability of the population and of the sample size. Where the population can be easily segmented into groups or strata, selecting more members from the stratum with high variability, and fewer from the group with low variability, has the effect of reducing the overall standard error of the sample mean, compared with the situation of proportional sampling from each stratum.

In this study, the researchers had no prior knowledge about the underlying variability of the population. Therefore, it was not possible to design a sampling regime that would minimise the standard errors of the estimated sample means.[5] The approach adopted was the pragmatic one of aiming for the largest sample size possible within the existing budget and time constraints.

These constraints also impacted upon the representativeness of the sample design. Table 2.1 shows the time frame over which interviews were conducted in each place, and the number of interviews conducted. The number of interviews was determined by the rate at which interviewers were able to conduct them over the period. All interviewing had to be completed by the end of May, to allow for a report to be prepared by the end of June.

Clearly, it would have been preferable to carry out sampling throughout the year, rather than for the few months that were operationally feasible. It is possible that visitors outside of the survey period possessed different characteristics to those within the period. However, even if sampling were to occur throughout the year, it would still be possible that the particular year chosen was unrepresentative in some way.

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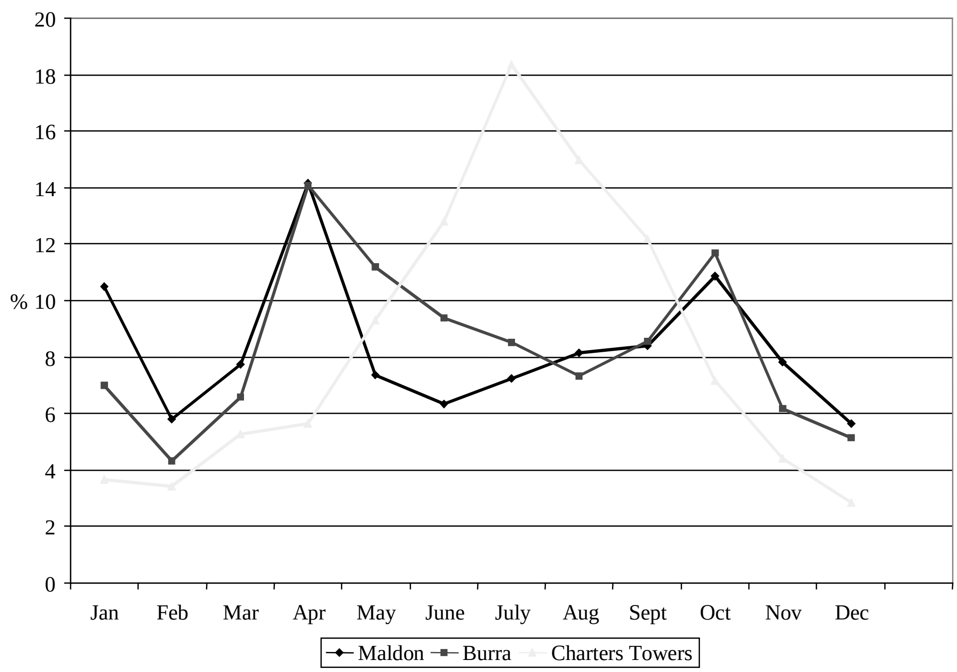
[4] The standard error of a sample mean is the standard deviation divided by the square root of the sample size. Other things equal, the larger the sample size, the smaller the standard error.
[5] Stratification using known variances of population strata reduces the overall sample variance and hence reduces the width of confidence intervals around sample means.

Table 2.1 Sample Size and Timing

	Time of sample	Sample size
Maldon	18 February to 26 March	746
Burra	17 March to 28 May	410
Charters Towers	15 April to 28 May	435

A further issue relating to the sample's representativeness is that of within-year seasonal patterns of visitation. Using data for visitors to each of the visitor centres in the three towns, Figure 2.1 shows the seasonal patterns.

Figure 2.1 Seasonal Visitor Patterns, Monthly Percentage of Annual Total



Clearly, Maldon and Burra have pronounced peaks in visitor numbers during the period of the survey. This gives confidence that any types of visitors missing from the samples in those towns were in the minority. However, for Charters Towers, the single peak of activity is outside of the sample period. This indicates that caution should be used in interpretation of the Charters Towers results, as the visitors not represented in the sample may exhibit different characteristics from the visitors included within the sample.

Further to this point, the sampling procedure deliberately avoided sampling during special events such as the Burra Festival, as the large number of visitors in town for such an event had the potential to unduly skew the results.

Aside from the issue of representativeness mentioned earlier, the question of efficiency is really a question of how confident we can be that the sample means are close to the true, but unknown, means for the whole visitor population. This is often gauged by looking at the standard error of estimate[6] of the mean expressed as a percentage of the mean itself.

Since visitor expenditure is a key issue in this study, we have decided to concentrate on the standard errors of the various components of such expenditure. In Appendix B the sample size, the mean, the standard deviation and the standard error as a percentage of the mean are shown in each town for each item of expenditure.

Some of the standard errors are quite large: for example, the standard error for (non-package) accommodation by package tourists in Maldon is 68.75 per cent. However, in most cases of large standard errors, the component of expenditure is not particularly significant in determining the overall level of expenditure. This is either because the proportion of visitors in that category is small (the 'Package tourist' category is an example of this) or because the item of expenditure is small (for example, the category 'Other expenditure' in each town).

To place the standard errors into some kind of perspective in terms of their significance to the overall estimate of economic impact, we multiplied the mean for each item by the sample size to get a measure of aggregate expenditure within the sample. The components with the largest such aggregates are clearly the most important in determining the size of overall expenditure estimates.

Table 2.2 shows the five largest expenditure items for each town and their associated standard errors. Of the 15 items shown, eight have standard errors of less than 10 per cent and only two exceed 15 per cent[7]. The worst case is transport expenditure for Charters Towers where there is a great deal of variability in the sample.

It is suspected that this variability is a feature of all visitors to Charters Towers. Discussions with Tourism Queensland have indicated two broad types of visitor to the town:

1. those visiting the town for its own attractions; and
2. those passing through on their way to places such as Mt Isa and beyond.

[6] The standard error of estimate of the mean is estimated as the standard deviation divided by the square root of the sample size. For details see any standard statistical text such as Kenkel, J. (1984) *Introductory Statistics for Management and Economics*, Duxbury, Boston.
[7] The Bureau of Tourism Research urges caution in using standard errors in excess of 15 per cent. See Johnson, L. (2000)*Tourism by Domestic Visitors in Regional Australia*, Bureau of Tourism Research Occasional Paper No. 31.

These two groups would clearly have very different petrol purchase behaviour as an example of their different transport expenditure.

All things considered, the sampling errors for large expenditure items are acceptable, giving confidence in the accuracy of the economic impact estimates.

Table 2.2 Standard Errors of Significant Expenditure Items

Town and item	Sample aggregate expenditure ($)	Standard error (%)
MALDON		
Overnight stayers – accommodation	14 492	7.6
Overnight stayers – meals and beverages	14 007	8.2
Overnight stayers – shopping	11 715	11.4
Day-trippers – shopping	11 300	11.4
Day-trippers – meals and beverages	6 511	4.7
BURRA		
Overnight stayers – accommodation	9 900	13.4
Overnight stayers – meals and beverages	7 447	8.9
Overnight stayers – shopping	5 417	16.2
Overnight stayers – transport	5 118	10.3
Day-trippers – meals and beverages	2 679	11.5
CHARTERS TOWERS		
Overnight stayers – accommodation	14 426	9.3
Overnight stayers – transport	13 458	22.9
Overnight stayers – shopping	12 628	7.0
Overnight stayers – meals and beverages	12 178	7.8
Day-trippers – transport	3 221	8.7

2.2 Sample Implementation

Visitor surveys were conducted during the first six months of 2000 via face-to-face interviews in the towns. Local people were employed as interviewers and were trained by researchers from the University of Canberra. In each case, the local visitor centre assisted with the recruitment of interviewers and the management of the interview process. The visitor centre received a fee for this service.

The questionnaire (see Appendix C) was designed in consultation with the Australian Heritage Commission, and was intended to seek information on aspects of visitor motivation, as well as seeking expenditure information. Framing and pattern of expenditure questions followed standard approaches in tourism expenditure studies. In addition, questions about the interest that visitors had in history and heritage and their preferences for information were included. The questions were primarily closed option questions. As such, they may have omitted options that were significant. However, in most cases there was the opportunity for the respondent to choose an ‘other, please specify’ option.

The questionnaire was piloted in Maldon over the weekend of 18–19 February. This resulted in some minor amendments such as the inclusion of ‘shops’ in the list of places visited. Generally, shopping is an important component of tourism activity and expenditure, and visitors to the three towns displayed the same propensity as other visitors in this regard.

Completed questionnaires were sent to the University of Canberra for editing and computer entry and analysis. Because interviews commenced in Maldon before the other towns, there were more completed questionnaires from Maldon (746) than from Burra (410) or Charters Towers (435). However, day-trippers comprised 64 per cent of visitors to Maldon, leaving some 246 overnighters in Maldon in the survey, compared with 176 overnighters in Burra, and 256 in Charters Towers.

Questionnaires (see Appendix C) were almost the same in each case, except for a few location-specific issues. They covered aspects of visitor characteristics, visitor behaviour and expenditure, attitudes to various heritage issues and questions of satisfaction.

Interviewers were instructed to move about the main historical precinct of each town, and not to restrict interviewing to people who had used the Visitor Centre. In Maldon, some interviewing was also done at the steam railway attraction.

Interviews were conducted on weekends and on at least one weekday each week. Although this approach tends to maximise coverage, in that sampling is done when most visitors are in town, it may introduce small biases away from visitors to the towns outside of weekends. For the first weekend in each town, a researcher from University of Canberra was present to monitor the interviewing. Thereafter, this function was performed by the local visitor centres.

Sampling such as this can never hope to achieve statistical purity in terms of randomness or representativeness. The best that can be hoped for is to aim for reasonably large sample sizes and to guard against obvious biases (only sampling at petrol stations or outside public toilets, for example).

The researchers have reason to believe that in Charters Towers there may have been some bias towards people visiting the attractions of the town; the sample may under-represent people who were simply passing through, buying petrol or some food on their way west. This bias is not important for the sections of the study dealing with the town’s attractions, but it is relevant to the overall picture of economic impact. Accordingly, some adjustments have been made in the Charters Towers section on economic impact.

CHAPTER 3 THE MALDON STUDY

3.1 Background

The town of Maldon is located in the goldfields district of central Victoria, 137 kilometres from Melbourne. Gold was discovered in 1853[8], and by 1861 some 3300 people lived in the town. With the wealth derived from gold, permanent buildings were constructed, including several dwellings, banks and shops. As with most of the goldfields developments, as the gold ran out the population dwindled, falling to 723 in 1933.[9]

Lack of major economic development in the town resulted in few of the original buildings being demolished. In the 1960s the nineteenth century streetscapes were recognised as having heritage value, and the town was declared the first ‘notable town’ by the National Trust in 1966. These streetscapes and their associated ambience are now seen as an attraction for tourists, including day-trippers from Melbourne. Adjuncts include a steam railway, which runs two days per week and various mining sites which have been developed for tourism.

The Maldon Visitor Centre collects data on numbers of visitors who use the centre, and these have increased from 13 974 in 1996 to 17 142 in 1999. Maldon appears to be a place that has a growing tourism interest which is balanced – and possibly enhanced – by, an awareness and appreciation of its heritage significance.

3.2 The 2000 Maldon Visitor Survey

The present study surveyed visitors to the town over the period from 26 February to 26 March 2000 inclusive, using face-to-face interviews. A pilot survey was run on the weekend of 19–20 February 2000. Interviewers were recruited locally with the assistance of the Mount Alexander Shire, which has its offices in nearby Castlemaine. The interviewers were given training in Castlemaine on 25 February and in Maldon from 26 to 27 February 2000.

Interviews were conducted every weekend over the survey period and on alternating Wednesdays and Thursdays midweek. This midweek pattern followed local advice that Friday’s visitors were likely to remain in Maldon on the weekend; they were, therefore, covered by the surveying which took place on weekends. Mondays and Tuesdays were days of very low visitation.

Interviewing was conducted mostly in the town, in and around the main street’s shopping area, and near the visitor centre. Some interviewing was also done at the railway station, when the steam railway was running. Interviewers were instructed to approach people at random and to move around the main shopping precinct in order to reduce the chances of bias that could occur if they were to stay in one location.

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[8] This summary of the background of Maldon is drawn from Baker (1995).
[9] By 1999 it had recovered to 1200.

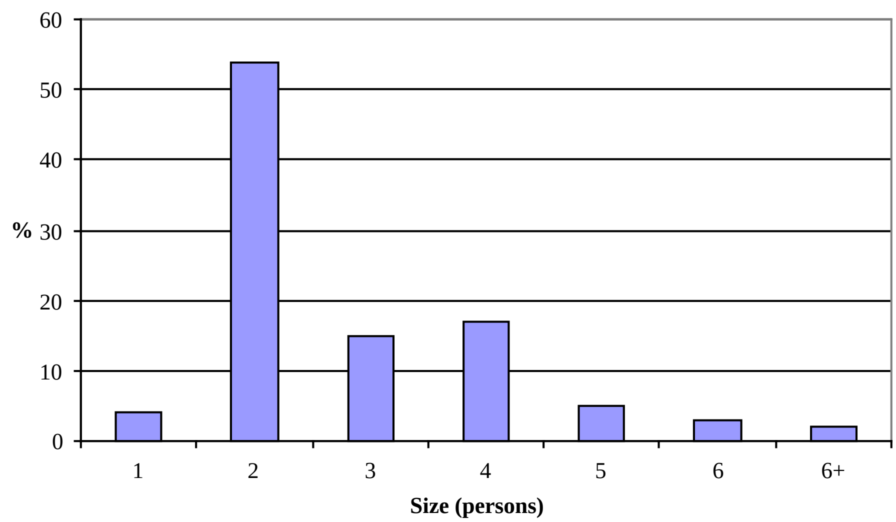
A total of 746 interviews were conducted, comprising 476 (64 per cent) day-trippers, 19 (3 per cent) people on package tours and 246 (33 per cent) overnight stayers (other than those on package tours). Data from the survey was analysed using the SPSS package. The results are presented in the following sections:

- Visitor Characteristics
- Visitor Behaviour
- Heritage Issues
- Visitor Expenditure and Economic Impact
- Visitor Satisfaction.

3.3 Visitor Characteristics

As Figure 3.1 shows, the median group size for visitors to Maldon was two, with 28.2 per cent of visitors being in groups of four or more.

Figure 3.1 Size of Maldon Groups



The overwhelming majority of people (63 per cent) found out about Maldon from their friends, as shown in Table 3.1. This finding illustrates the importance of quality of experience and customer satisfaction. Each cohort of Maldon visitors is obviously a powerful force in generating future visitors, provided they return to their homes with positive things to say.

'Local tourist authority' in Table 3.1 is open to interpretation and was an unfortunate choice of words in the design of the questionnaire. More useful information may have been obtained if the Maldon Visitor Centre were identified separately. Notwithstanding the importance of friends and word of mouth advertising, it is clear from Table 3.1 that other significant avenues for Maldon to communicate with its potential tourism market are newspapers, magazines, Tourism Victoria, travel shows on television and travel guidebooks.

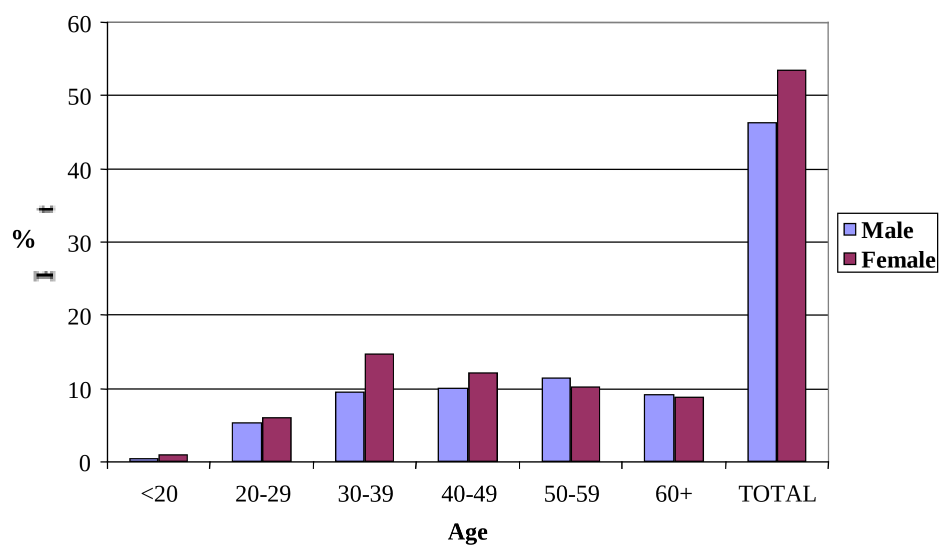
Table 3.1 How Visitors Found Out About Maldon

Information source	Percentage
From friends	63
Newspaper story	9
Magazine article	6
State tourist authority	6
Local tourist authority	7
TV program	5
Radio program	1
Web/Internet	1
Motoring association	2
Travel guidebook	6
Always known/previous knowledge	1

Note: multiple responses were possible.

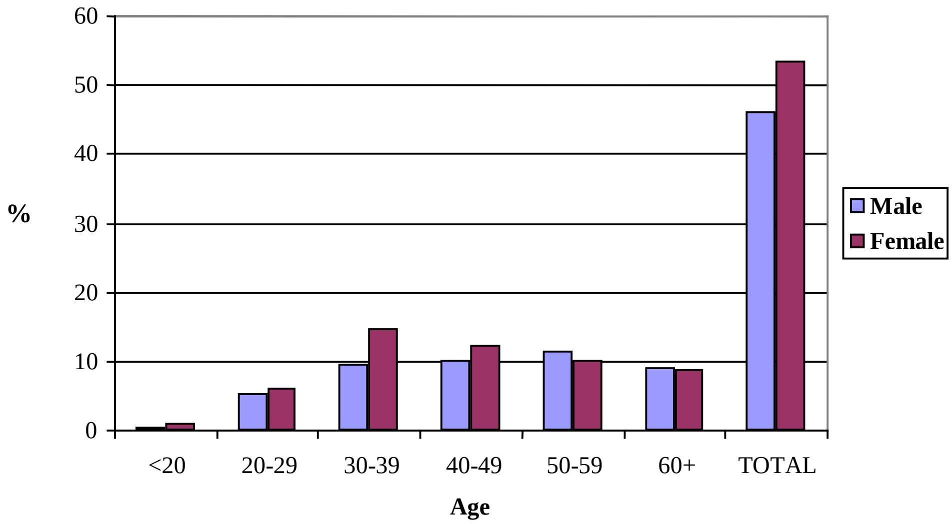
The ages and genders of visitors are displayed in Figure 3.2, while the survey respondents' ages and genders are displayed in Figure 3.3. It is interesting to note that while females are in excess of males as visitors (55 per cent compared with 45 per cent[10]), the reverse is true for respondents (54 per cent male). Also, it is noticeable that visitors are spread fairly evenly across the age categories, whereas respondents to the survey tended to be concentrated in the 30–39 years age group and the 50–59 years age group.

Figure 3.2 Visitors' Ages and Genders



[10] Assuming a population masculinity ratio of 50 per cent, the sample female proportion of 55 per cent is significantly different (Z value = 2.75).

Figure 3.3 Respondents' Ages and Genders



The origins of surveyed interviewees (respondents) are shown in Table 3.2. This table is based upon a grouping of respondents according to their postcodes. It should be noted that these are *respondents'* postcodes only, and may not correspond exactly to all sampled *visitors'* postcodes. In other words, Table 3.2 is based on the postcode of the respondent, who may have been travelling in a group: for practical expediency, the postcodes of other members of the group were not recorded.

Table 3.2 Origins of Visitors to Maldon

Origin	Percentage
Overseas	6.2
Melbourne	47.4
Near Maldon	5.2
Other Victorian	28.4
Sydney	3.1
Other New South Wales	3.6
Australian Capital Territory	0.2
Queensland	1.6
South Australia	2.9
Other Australia	1.5

It should also be noted that the data in Table 3.2 reflect the fact that interviewers were given the map shown as Map 3.1 and told not to interview people who lived in the Loddon Statistical Division. Some interviewers ignored this instruction, with the result that 5.2 per cent of ‘Near Maldon’ visitors were recorded. This was determined by a circle roughly encompassing Bendigo and Ballarat.

In point of fact, more than 5.2 per cent of Maldon’s visitors were likely to come from this area. However, the region of interest for this study was the Loddon Statistical Division, an area which is important for economic data. The definition of visitors was thus restricted to people from outside of this area (see Map 3.1). Bendigo is in the Loddon Statistical Division but Ballarat is not.

Table 3.3 ranks visitors’ leisure activities. Multiple responses were possible to this question, which means that the responses add up to more than 100. It is clear that Maldon visitors, as well as being interested in the usual leisure activities such as restaurants and cinemas, are highly interested in history and preservation but are less interested in organised entertainment such as the performing arts or popular concerts. The high ranking given to country drives is a reflection of the proximity of Maldon to Melbourne and the population in the immediate vicinity, which includes Bendigo and Ballarat.

The activities ‘Visiting heritage buildings’, ‘Visiting a national park’, ‘Bushwalking’, ‘Reading Australian history’, and ‘Visiting a museum’ are all indicators of a strength of interest in the preservation of historical culture.

Map 3.1 Loddon Statistical Division

Table 3.3 Visitors' Leisure Activities

Leisure activity	Percentage
Country drives	88
Going to a restaurant	81
Cinemas	65
Visiting heritage buildings	60
Visiting a national park	59
Bushwalking	48
Reading Australian history	42
Visiting a museum	41
Reading general history	39
Theatre, opera, ballet	26
Popular concerts	25
Overseas holidays	20

Note: multiple responses were possible.

3.4 Visitor Behaviour

The median length of stay was two to four hours. However, 28 per cent of visitors spent over six hours in the town. Of the visitors who stayed overnight, the most popular length of stay was one night, with 57 per cent staying two or more nights. Figure 3.4 displays the distribution of nights stayed. The figure depicts a dominance of day-trippers and one-night stayers. If tourism promotion agencies could encourage a significant number of those people to increase their stay by one night, Maldon could gain greater economic advantage from tourism.

Figure 3.4 Nights Stayed in Maldon

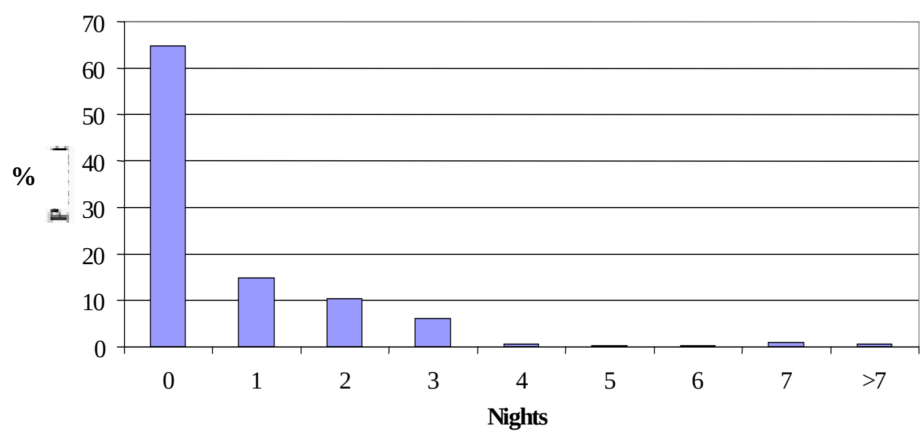


Table 3.4 shows the forms of accommodation used by people staying overnight in Maldon. Local opinion is that bed and breakfast establishments are the most popular form of accommodation. This did not show up in pilot surveying and, therefore, did not enter deliberations when the final questionnaire was being designed. This possible oversight may have resulted in respondents who stayed in bed and breakfast establishments ticking either 'Guesthouse' or 'Other'.[11]

Table 3.4 Types of Accommodation Used

Type of accommodation	Percentage
Caravan park	25
Friends/relatives	22
Hotel/motel	19
Guesthouse	16
Other	13
Serviced apartment	2
Farm stay	2
Youth hostel	1

It is possible that, had bed and breakfast been a separate category, it would have been the most commonly used accommodation type, rather than caravan park. Nevertheless, the caravan park is clearly a very popular accommodation option. It is also interesting that a significant proportion of visitors stayed with family or friends.

Table 3.5 tabulates the responses people gave when giving their main reason for visiting Maldon. Visiting the heritage attractions of Maldon was the most popular reason, followed by 'Weekend short break'. The 'Other' category was the third most popular: within this category, people specified 'passing through' (2.7 per cent), 'stopover' (1 per cent), 'the steam train' (2.5 per cent) and 'shopping' (1.5 per cent).

As Table 3.6 shows, the main street shops were the most popular of the attractions listed, with 'Other' being the second most popular. Historic buildings came a distant third. This may appear surprising, given that the majority of visitors are day-trippers who could presumably enjoy similar coffee, ice cream etc. in their home town. However, the Maldon main street has a well-preserved historical streetscape which enhances the shopping experience.

Eighty-four per cent of the sample fell into the 'Other' category for 'Place Visited' (Table 3.6). Within this category, the most popular destinations were Mount Tarrengower (15 per cent), 'horses' (9 per cent), and antique shops (7 per cent). The attractions featuring a mining theme were not as popular as those featuring general historical themes, such as 'historic buildings' and 'steam railway'.

[11] Of the 12 per cent who responded 'Other', some seven percentage points specified bed and breakfast on the questionnaire.

Table 3.5 Main Reason for Visiting Maldon

Reason	Percentage
To see heritage sites	28
Weekend short break	27
Other	18
Visit friends/relatives	12
Holidays	9
Personal	2
Business, education	2
Sport	1
Conference/seminar	1

Table 3.6 Places Visited

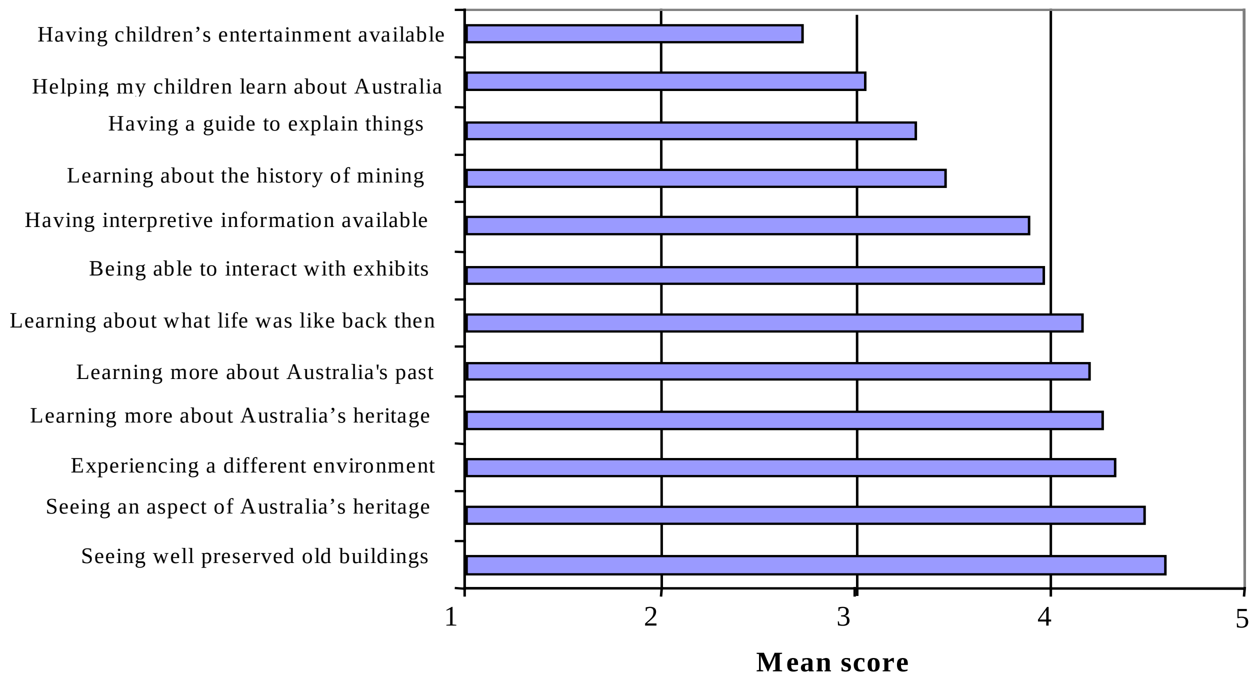
Place visited	Percentage
Main street shops	95
Other	84
Historic buildings	49
Steam railway	30
Beehive chimney	19
Carman's tunnel	16
Museum and courthouse	15
Porcupine township	13
North British mine	10
Historic cemetery	9

Note: multiple responses were possible.

3.5 Heritage Issues

Figure 3.5 displays the responses to a series of options about attributes of historical mining areas. For each attribute, the figure displays the respondent's average rating of the attribute on a 1 to 5 scale where 5 is 'very important' and 1 is 'not at all important'.

Figure 3.5 Important Attributes in Heritage Mining Areas



The two most popular attributes were ‘Seeing well-preserved old buildings’ (4.6) and ‘Seeing an aspect of Australia’s heritage’ (4.5). These ‘seeing’ options rated more highly than the ‘learning’ options of ‘learning more about Australia’s heritage’ (4.24) and ‘Learning more about Australia’s past’ (4.22), although statistically the difference is not great enough to allow a firm conclusion.

It is also interesting that learning about heritage and learning about the past were virtually indistinguishable, which indicates that people use ‘past’ and ‘heritage’ interchangeably. The least important attributes for people were ‘Having children’s entertainment available’ (mean score of 2.7) and ‘Helping my children learn about Australia’ (3.1). This lack of interest in children’s activities is a reflection of the fact that only 2 per cent of visitors to Maldon are under 20 years of age, and that over half of the visitors are made up of adult couples.

Leaving aside the children’s activities, it is clear from the survey that there is little interest in having a guide or any interpretive information available. There is also little interest in having interactive features, which is possibly also a function of the adult nature of the visitor profile.

Visitors to Maldon are interested in heritage and seeing preserved heritage, with over 95 per cent of respondents having visited heritage places other than Maldon. Their likes and dislikes at other cultural places are summarised in Table 3.7.

Table 3.7 Visitors' Likes and Dislikes at Heritage Places Other Than Maldon

LIKES		DISLIKES	
Feature	Percentage	Feature	Percentage
Good visitor amenities	69	Overly commercial	61
An authentic experience	68	Too crowded	48
Good information	64	Poor visitor amenities	39
Peaceful surroundings	58	Inadequate information	27
Friendly welcome	54	Not an authentic experience	21
Nice cafés	51	Unfriendly welcome	16
Well-developed attraction	40	Poorly developed attraction	14
Shopping for crafts	38	No cafés	13

Note: multiple responses were possible.

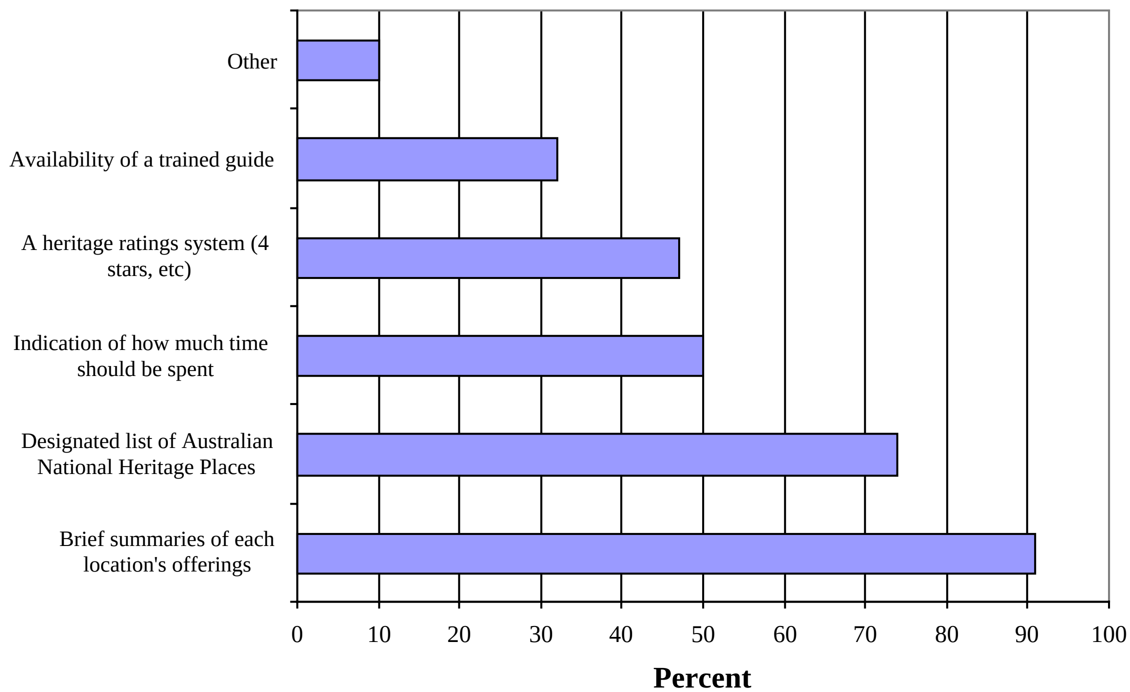
Information, amenities and authenticity emerge in Table 3.7 as important components of a successful cultural heritage tourism destination. There is also a clear aversion among this segment to too much commercialisation, although the question of how much is too much is a question for further research. There does not appear to be a strong demand for well-developed tourist attractions, suggesting that authenticity rather than novelty or entertainment is the sought after experience.

Other attributes that were mentioned by respondents as 'likes' were 'atmosphere' (0.5 per cent), 'good food' (0.3 per cent) and 'shops' (0.3 per cent). Other dislikes about other heritage places were 'parking' (0.3 per cent) and 'too expensive' (0.3 per cent).

Figure 3.6 shows respondents' ratings of usefulness of information types. This question was posed in terms of what information would be useful when planning a visit to a heritage place (not necessarily a mining place). The most useful type of information was a brief summary or summaries of what was offered at each destination. The idea of a list of national heritage places as a source of information when planning a trip was also very popular. Further research on these issues is needed to find out whether the most popular format would be print or electronic.

Combining impressions from Figure 3.6 with those from Tables 3.5 and 3.6 gives an image of a well-defined tourism segment made up of adult visitors travelling in pairs and interested in well-preserved heritage buildings. These visitors are also interested to have information about what is on offer at heritage places available before they plan a trip, and in the significance of the heritage values of destination attractions.

Figure 3.6 Ratings of Useful Information Types



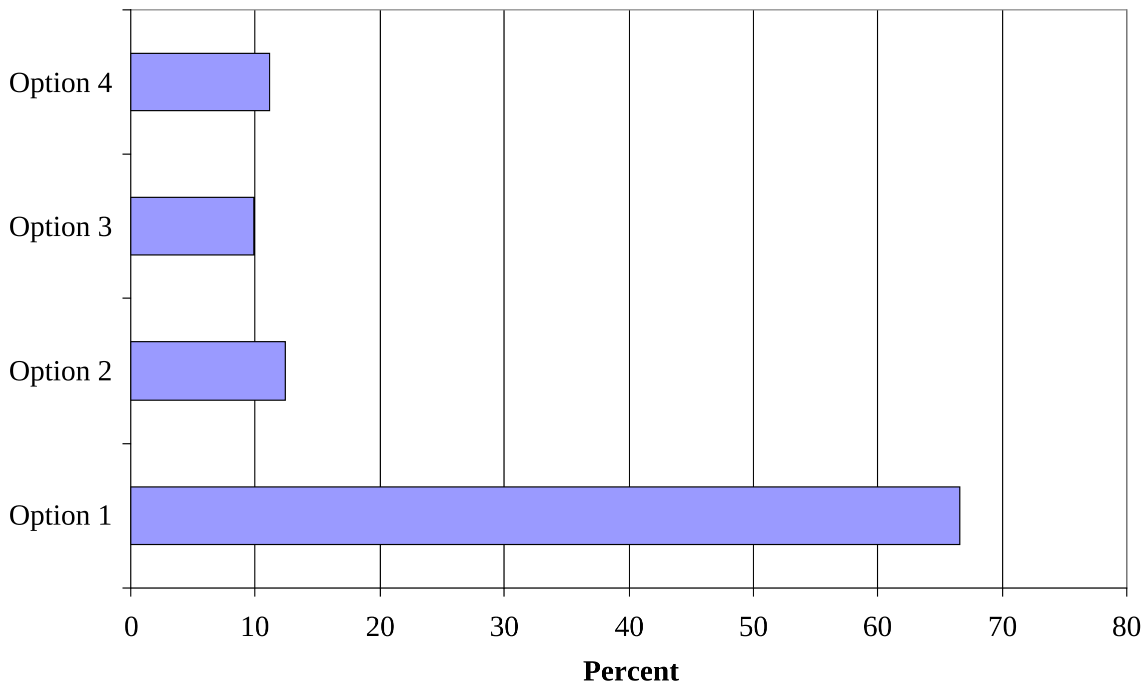
In relation to preservation of heritage attractions a question which arises is 'Who is going to pay for the preservation?'. With governments on both sides of politics displaying market-based ideologies, it is useful to know how visitors to heritage places rate different funding options.

Respondents were presented with four different models of funding. The descriptions were necessarily brief to allow them to be answered within the interview. They were as follows:

Option 1	A well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation.
Option 2	A well-maintained area, good signage and other information, no heritage tax, substantial commercialisation.
Option 3	Area in gentle decay, minimal information, no heritage tax, no commercialisation.
Option 4	Area in gentle decay, good signage and other information, a $10 per year heritage tax, no commercialisation.

It should be noted that this is clearly not an exhaustive list of options for the management and preservation of heritage places. It is also not an opinion poll of the tax-paying population, so no definitive conclusions can be reached about whether tax revenue should or should not be used to pay for preservation of heritage areas.[12]

Figure 3.7 Heritage Preservation and Funding Choices



Given the above qualifications, it is clear that visitors to Maldon have a strong preference for option 1 – ‘a well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation’. This option clearly discounts commercialisation as a source of funds for preservation and expresses the view that the taxpayer should somehow pay. It also expresses a clear preference for a well-maintained area, as opposed to the option of allowing the area to decline into gentle decay.

3.6 Visitor Expenditure and Economic Impact

The survey questionnaire elicited responses on expenditure per person in a number of expenditure categories. Mean expenditure was calculated for each expenditure category and for overall expenditure. Each mean was then multiplied by an estimate of the total annual number of visitors to Maldon, in order to estimate total annual expenditure per visitor. This was done on a stratified basis, in order to improve the accuracy of the estimate.

[12] In order to prevent the interview from causing interviewee fatigue, no details were given on such things as ‘commercialisation’ or a ‘$10 heritage tax’. Interviewers were trained to say that the detail was not the issue, but rather whether the taxpayer should pay, ort whether private businesses should pay.

Three strata were used, namely day-trippers, package tourists and overnight stayers. Table 3.8 shows the proportion of visitors in each category and their mean overall expenditure. Expenditure on packages were allocated to Maldon on the basis of the number of nights in Maldon as a proportion of the total number of nights included in the package. It is important to note that package tourists also undertook expenditure over and above the package component, especially on shopping.

Table 3.8 Tourist Segments and Mean Expenditure Per Person

Segment	Proportion (%)	Mean expenditure ($)
Day-trippers	64	48.17
Package tourists	3	148.30
Overnight stayers	33	194.32
TOTAL	100	99.40

Using data published by the Bureau of Tourism Research (Bureau of Tourism Research 2000, Occasional Paper No. 31) an estimate was made of the average expenditure by all domestic visitors to the Loddon-Bendigo region. This was $113.22 for 1998, the only year for which data were available. This is slightly higher than the $99.40 estimated for Maldon. Of course, the two figures are far from strictly comparable, being for different years and visitor population groups. Nevertheless, they indicate that the sample estimate for Maldon is not unrealistic.

The total expenditure in a year by visitors to Maldon was estimated by multiplying the means for each segment and each expenditure category by the annual number of visitors in each segment or strata. The latter was estimated by using the proportions in Table 3.8, in conjunction with an estimate of the total number of annual visitors to Maldon.

There is no official source of data on the total number of visitors to Maldon, but some data had been provided by the operators of the Steam Railway and by the operators of the Eagle Hawk Motel for 1999. The proportion of total visitors who had used these was known from the survey; by combining the two, the total visitor number for 1999 was estimated at either 43 720 (Steam Railway base) or 40 015 (Eagle Hawk Motel base). These two estimates were sufficiently close to give a measure of confidence in the accuracy of their general magnitude.

The average of the two estimates is 41 868. As a cross-check on this figure, it was known that some 17 142 people used the Maldon Visitor Centre in 1999. This means that about 40 per cent of visitors used the Visitor Centre, which is consistent with the finding from the survey that 36 per cent of visitors were not day-trippers.[13]

[13] Day-trippers would be less likely to use the Visitor Centre than the other visitors, especially if they were from Melbourne and had been to Maldon before.

Table 3.9 shows the annual estimated expenditure in each category and for each segment, using the estimated total visitation of 41 868. Total annual visitor expenditure is estimated at $4.27 million, and it is interesting to note that overnight stayers account for 62 per cent of the total expenditure, despite constituting only 33 per cent of the visitor numbers. Day-trippers, who account for 64 per cent of visitor numbers, account for only 30 per cent of expenditure.

The most important overall category of expenditure is ‘Shopping’. This is followed by ‘Meals and beverages’. Further research is warranted into the exact nature of the shopping. It is interesting to observe that day-tripper expenditure on shopping and site entry fees was as great as that of overnight stayers. The largest item of expenditure for the latter group was accommodation.

Table 3.9 Aggregate Annual Expenditure by Visitors

Category	Day-trippers	Package tourists	Overnight stayers	TOTAL
Accommodation	0	59 901	832 441	892 342
Meals and beverages	366 563	80 963	780 353	1 227 878
Transport	140 409	23 413	293 599	457 421
Site entry	88 693	10 773	88 149	187 615
Other entertainment	7 503	1 363	23 626	32 491
Shopping	636 126	119 547	652 689	1 408 361
Other	51 447	1 470	13 955	66 872
TOTAL	1 290 740	297 430	2 684 811	4 272 981

The calculation of the economic impact of tourist expenditure is dependent upon the region of interest. If Australia were the region of interest, the economic impact would be small because only 6 per cent of visitors were from overseas. The remaining 94 per cent of Maldon’s visitors were residents of Australia and were merely shifting expenditure around Australia, not creating new expenditure for the nation.

In choosing the region of interest for this study, a major consideration was the topicality of small area regional economic development. The smallest region around Maldon for which an economic model was available was the region named Loddon and used by the Australian Bureau of Statistics as a Statistical Division.

The study team was provided with an economic input-output model for Loddon Statistical Division by Dr Ari Gamage of Victoria University of Technology. This model enables calculation of the multiplier effects of the Maldon visitor expenditure on the wider Loddon Statistical Division. It specifically takes account of the fact that some of the economic effects of visitor expenditure in Maldon occur outside of the Loddon statistical area because some of the goods and services involved in visitor expenditure are produced outside the district.

Table 3.10 shows the impact of Maldon visitor expenditure on total incomes (wage income and gross business income) and employment. The total impact is $5.458 million in terms of incomes, with $3.821 million of this being in the Loddon Statistical Division. There are 450 jobs being supported by the visitor expenditure, with 310 of these being in Loddon. The model does not enable the economic effects to be disaggregated into smaller regions such as Local Government Areas, but it would be reasonable to expect that a high proportion of the Loddon economic impact is felt in the Mount Alexander Shire.

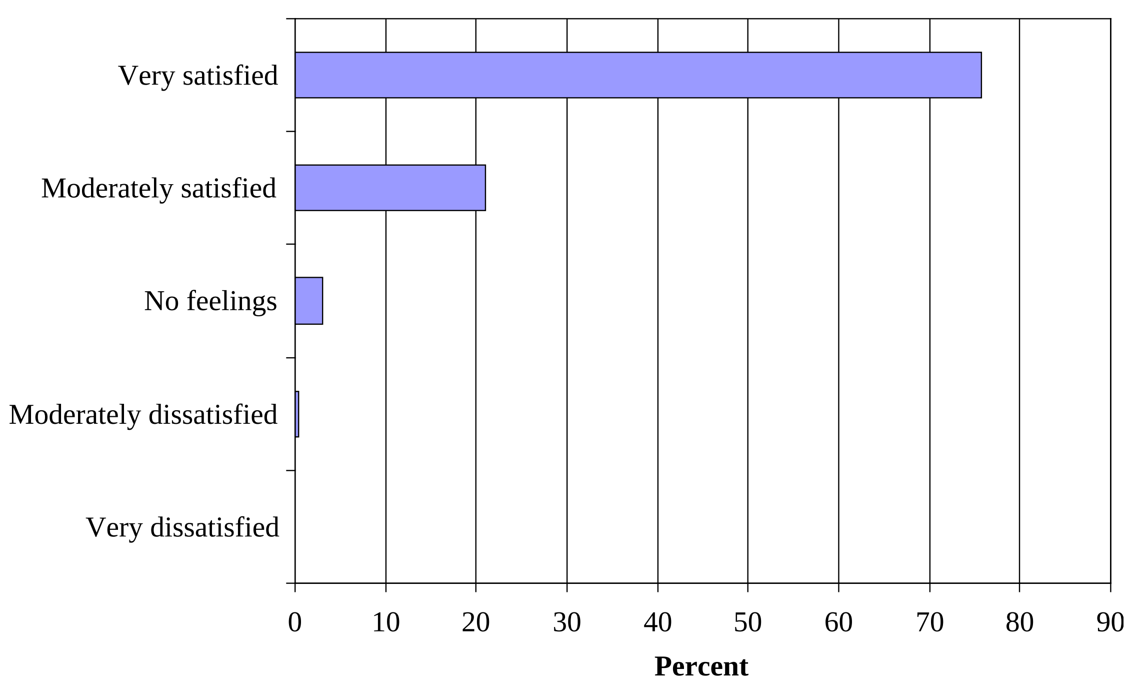
Table 3.10 Annual Economic Impact of Maldon Visitor Expenditure

	Regional income ($)	Employment
Within Loddon Statistical Division	3 820 880	310
Outside Loddon Statistical Division	1 637 520	140
TOTAL	5 458 400	450

3.7 Visitor Satisfaction

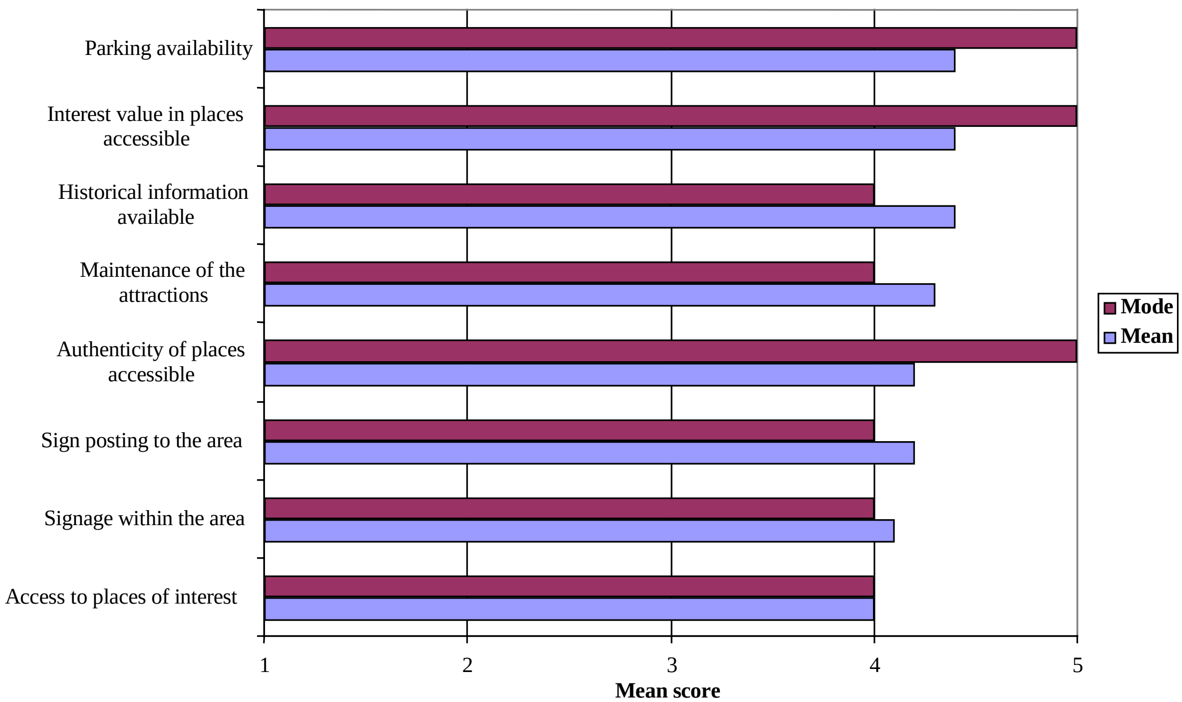
Successful management of a tourism destination is enhanced by knowledge of the reactions, both positive and negative, of the visitors to the area. The Maldon survey sought details on a number of visitor satisfaction issues. The overall satisfaction rating for respondents visiting Maldon is shown in Figure 3.8.

Figure 3.8 Overall Satisfaction Rating



Clearly, with 76 per cent of respondents being 'Very satisfied' with their visit, zero being 'Very dissatisfied' and only 0.4 per cent 'Moderately dissatisfied', Maldon is in the happy position of achieving very high visitor satisfaction.

Figure 3.9 Aspects of Visitor Satisfaction



Visitors were asked whether the elements shown in Figure 3.9 were 'very good' (score of 5) or 'very poor' (score of 1), with scores in between recording intermediate positions. Figure 3.9 shows the mean score for each element.

Access to places of interest was the most poorly rated[14], with parking availability being the most highly rated. Also highly rated were interest value of accessible places and historical information available. Although signposting was not highly rated, it does not appear to be so lowly rated as to be a significant problem, although it should be noted that some 21 per cent thought that signage within the area was 'average' or worse.

Finally, visitors were asked open-ended questions about the best and worst aspects of their visit. In describing the best aspects, words like 'pleasant', 'relaxed' and 'peaceful' appeared frequently. Also mentioned were the shops, authenticity, and history.[15] Clearly, the town has a strong image in this area which is working well in the minds of visitors.

[14] This may be a reference to shops not being open which is discussed further below.
[15] One wag even suggested that being interviewed by our survey team was the best aspect!

Apart from the weather, the most frequently occurring annoyance was shops not being open. There were also a significant number of complaints about the toilets being dirty, about flies and mosquitoes and about being a respondent in a survey. All things considered, it would appear from this that shops being closed and dirty toilets are the main grievances within human influence.

CHAPTER 4 THE BURRA STUDY

4.1 Background

The town of Burra is located in the copper district of mid-north South Australia, 160 kilometres north of Adelaide. It is on the edge of the dry pastoral district of South Australia, just a short drive from the wineries of the Clare Valley. Copper was discovered in the district in 1845, and by 1851 some 5 000 miners had moved to the area. At this time, South Australia was the third largest copper producer in the world, with Burra adding to mines established at nearby Kapunda in 1844.

The copper eventually dwindled, and the allure of gold in Victoria saw the local population decline. Lack of major economic development in the town resulted in few of the original buildings being demolished. In 1994 it was declared a State heritage town.

The National Trust operates a unique program for visitors called the Burra Passport. Available at the Visitor Centre, the passport provides visitors with access to and information on over 40 preserved heritage attractions. Major features include the Burra Mine site, the Morphett Enginehouse Museum, Redruth Gaol, miners’ cottages and the police lock-up. As an additional attraction, visitors are able to stay overnight in refurbished miners’ cottages, a group of which are managed by the Burra Branch of the National Trust of South Australia.

The Burra Visitor Centre collects data on numbers of visitors who use the centre. Numbers have increased from 13 787 in 1996 to 15 770 in 1999. Burra has a clearly defined tourism identity and an awareness and appreciation of its heritage significance. Unfortunately, there are no official data on total Burra visitation for comparison.

4.2 The 2000 Burra Visitor Survey

The present study surveyed visitors to the town over the period from 17 March to 12 June 2000 inclusive using face-to-face interviews. Interviewers were recruited locally with the assistance of the Burra Visitor Centre, which has its office in the centre of the historical precinct. The interviewers were given training in Burra on 17 March and were monitored over the weekend of 18–19 March.

Interviews were conducted every weekend over the survey period and on midweek days chosen at random. Interviewing was conducted mostly in the town, in and around the main street’s shopping area and near the Visitor Centre. Interviewers were instructed to approach people at random and to move around the main shopping precinct, in order to reduce the chances of bias that could occur if they were to stay in one location.

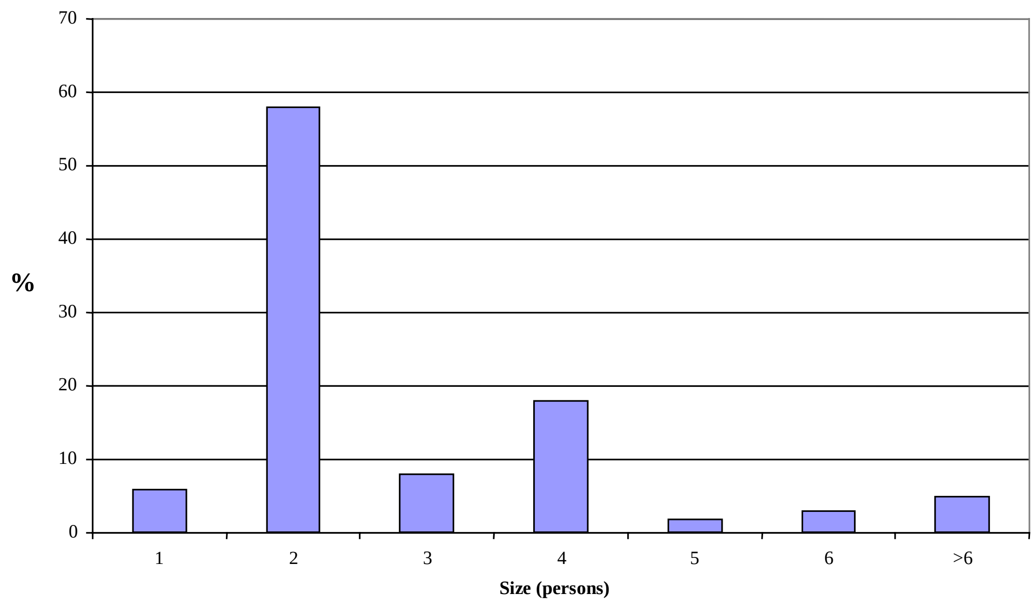
A total of 410 interviews were conducted, comprising 209 (51 per cent) day-trippers, 25 (6 per cent) people on package tours, and 176 (43 per cent) overnight stayers other than those on package tours. Data from the survey was analysed using the SPSS package. The results are presented in the following sections:

- Visitor Characteristics
- Visitor Behaviour
- Heritage Issues
- Visitor Expenditure and Economic Impact
- Visitor Satisfaction.

4.3 Visitor Characteristics

As Figure 4.1 shows, the median group size for visitors to Burra was two, with 28 per cent of visitors being in groups of four or more.

Figure 4.1 Size of Burra Groups



The overwhelming majority of people (66 per cent) had previous knowledge of Burra as shown in Table 4.1. Some 20 per cent found out about Burra from friends. These findings illustrate the importance of quality of experience and customer satisfaction. Each cohort of Burra visitors is obviously a powerful force in generating future visitors, either returning to the town themselves or influencing friends' decision to visit.

'Local tourist authority' in Table 4.1 is open to interpretation and was an unfortunate choice of words in the design of the questionnaire. More useful information may have been obtained if the Burra Visitor Centre had been identified separately. Notwithstanding the importance of friends and word-of-mouth advertising, it is clear from Table 4.1 that other significant avenues for Burra to communicate with its potential tourism market are travel guidebooks, television programs and the South Australian Tourism Commission.

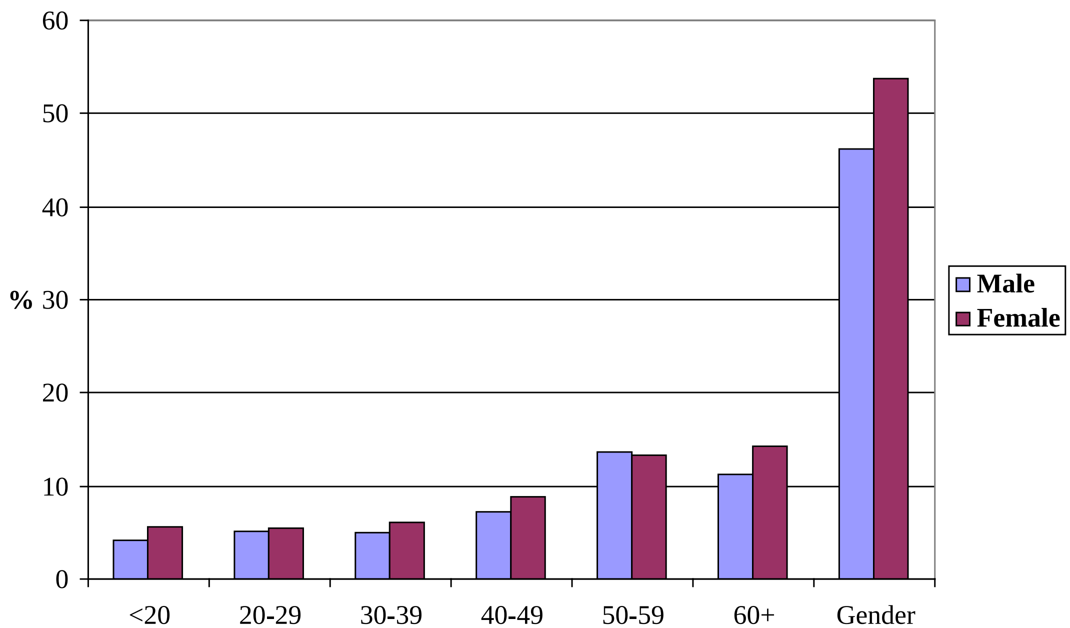
Table 4.1 How Visitors Found Out About Burra

Information source	Percentage
Previous knowledge	66
From friends	20
Travel guidebook	7
State tourist authority	4
TV program	4
Local tourist authority	3
Motoring association	3
Newspaper story	2
Magazine article	1
Web/Internet	1
Radio program	1

Note: multiple responses were possible.

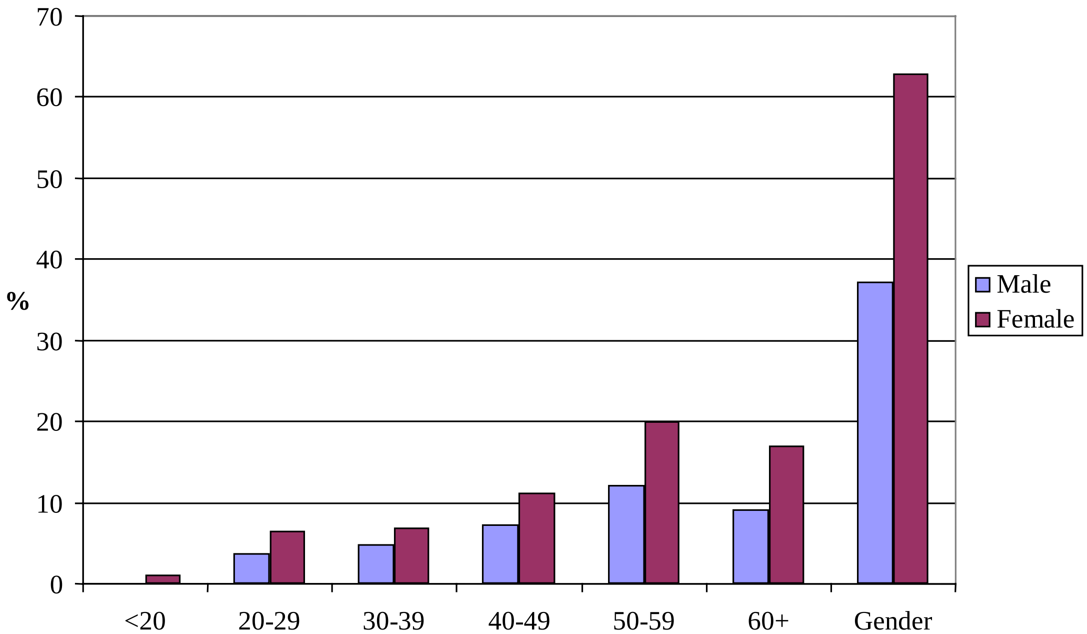
The ages and genders of visitors are displayed in Figure 4.2, while the survey respondents' ages and genders are displayed in Figure 4.4. It is interesting to note that females are significantly in excess of males both as visitors (54 per cent[16] compared with 46 per cent) and as respondents to the survey (63 per cent compared with 37 per cent).

Figure 4.2 Visitors' Ages and Genders



[16] The z value was 1.63, which is significant at 10 per cent.

Figure 4.3 Respondents' Ages and Genders



The origins of visitors are shown in Table 4.2. This table is based upon a grouping of respondents according to their postcodes. It should be noted that these are respondents' postcodes only, and may not correspond exactly to all visitors' postcodes. For example, where a respondent was from Adelaide but was showing Burra to guests from Melbourne, the Adelaide postcodes would be recorded, not the Melbourne postcode. Nevertheless, it is expected that this will balance out over the whole sample.

Table 4.2 Origins of Visitors to Burra

Origin	Percentage
Overseas	2.7
Adelaide	39.4
Other South Australia	19.6
Melbourne	7.6
Other Victoria	10
Sydney	4.2
Other New South Wales	8.1
Other States	9.5
TOTAL	100

It is not surprising that a high proportion of visitors come from Adelaide or other parts of South Australia; some 59 per cent of Burra visitors are from somewhere in the same State as Burra. However, there are healthy numbers of visitors from New South Wales and Victoria. The number of overseas visitors is not high but is in line with international visitation to South Australia generally.

Table 4.3 shows the rankings of visitors' leisure activities. Multiple responses were possible to this question, meaning that the responses do not sum to 100. It is clear that Burra visitors, besides being interested in the usual leisure activities such as restaurants and cinemas, are highly interested in history and preservation, but are less interested in organised entertainment such as the performing arts or popular concerts. The high ranking of country drives is a reflection of the proximity of Burra to Adelaide, and the population in the immediate vicinity, which includes the Clare Valley.

The activities 'Visiting heritage buildings', 'Visiting a national park', 'Bushwalking', 'Reading Australian history', and 'Visiting a museum' are all indicators of a strength of interest in the preservation of natural and cultural heritage.

Table 4.3 Visitors' Leisure Activities

Leisure activity	Percentage
Country drives	91
Going to a restaurant	76
Visiting heritage buildings	71
Visiting a national park	66
Visiting a museum	57
Cinemas	56
Bushwalking	56
Reading general history	53
Reading Australian history	51
Theatre, opera, ballet	32
Popular concerts	28
Overseas holiday	15

Note: multiple responses were possible.

4.4 Visitor Behaviour

The median length of stay was eight to 24 hours. However 38 per cent of visitors spent less than four hours in the town. Of the visitors who stayed overnight, the most popular length of stay was one night, with 28 per cent staying two or more nights. Figure 4.4 displays the distribution of nights stayed. The figure depicts a dominance of day-trippers and one-night stayers. If tourism promotion agencies could encourage a significant number of those people to increase their stay by one night, Burra could gain greater economic advantage from tourism.

Figure 4.4 Nights Stayed in Burra

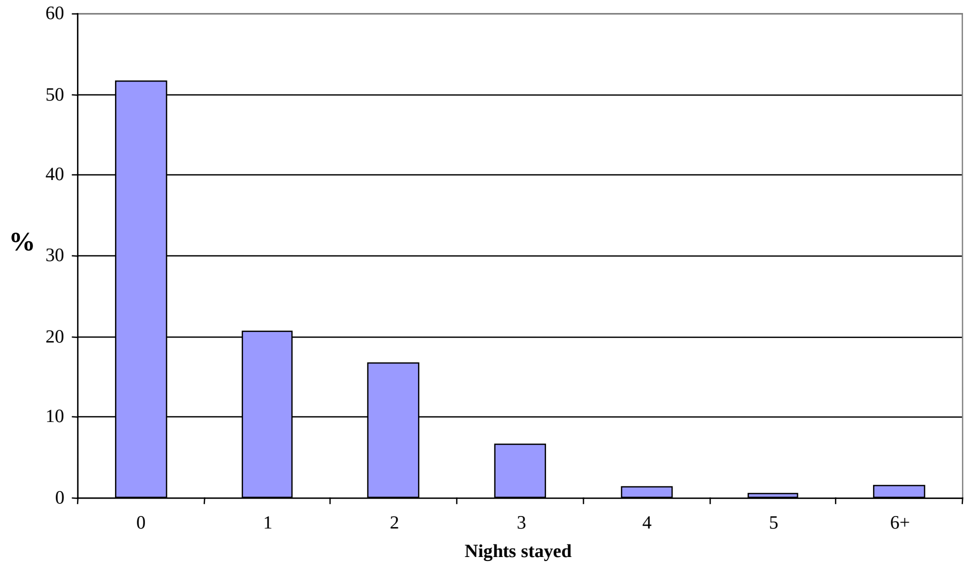


Table 4.4 shows the forms of accommodation used by people staying overnight in Burra. The caravan park, hotel/motel, and self-contained cottages are all equally popular. The proportion staying with friends and relatives is lower for Burra than for Maldon, possibly a reflection of Burra's greater distance from the capital city.

Table 4.4 Types of Accommodation Used

Type of accommodation	Percentage
Caravan park	27
Self-contained cottage	21
Hotel/motel	17
Bed and breakfast	16
Friends/relatives	14
Other	3
Host accommodation	2
Farm stay	1

Table 4.5 shows the main reason that people had for visiting Burra. The heritage attractions of Burra were the most popular reason, followed by 'Other', and 'Holidays'. The 'Other' category was second most popular and, within this, people specified 'passing through' (14 per cent), antique fair (2.2 per cent), and 'stopover' (1 per cent).

Table 4.5 Main Reason for Visiting Burra

Reason	Percentage
To see heritage sites	25
Other	21
Holidays	15
Personal	10
Visit friends/relatives	9
Weekend short break	9
Education	7
Business	3
Sport	1

The first ranking of the heritage attractions in Table 4.5 is a clear indication that the town has successfully positioned itself as a heritage tourist attraction. However, it is also seen as an attractive holiday destination apart from the heritage aspect of the town's assets. Further research would be needed to ascertain the type of holiday makers, and their motivations and behaviour.

As shown in Table 4.6, the antique shops were the most popular of the attractions listed, with the Burra mine site being second most popular. There is an even spread of interest across the categories in Table 4.6, unlike a similar table for Maldon where there was a dominant 95 per cent interest in the main street shops.

Of the 25 per cent showing 'Other' in Table 4.6, the most popular were the art gallery (4.4 per cent), cemetery (2.7 per cent), main street shops (2.7 per cent), bakery (2.4 per cent) and coffee shops (2 per cent). Apart from the popularity of antique shops (itself an indication of interest in history and heritage), the responses on places visited are evenly spread over places on the Burra Passport.

Table 4.6 Places Visited

Place visited	Percentage
Antique shops	54
Burra mine site	52
Miner's dugouts	41
Redruth Gaol	40
Paxton Square cottages	38
Police lockup and stables	32
Other	30
Morphett Enginehouse Museum	27
Bon Accord mine complex	26
Burra Market Square Museum	16
Malowen Lowarth	12

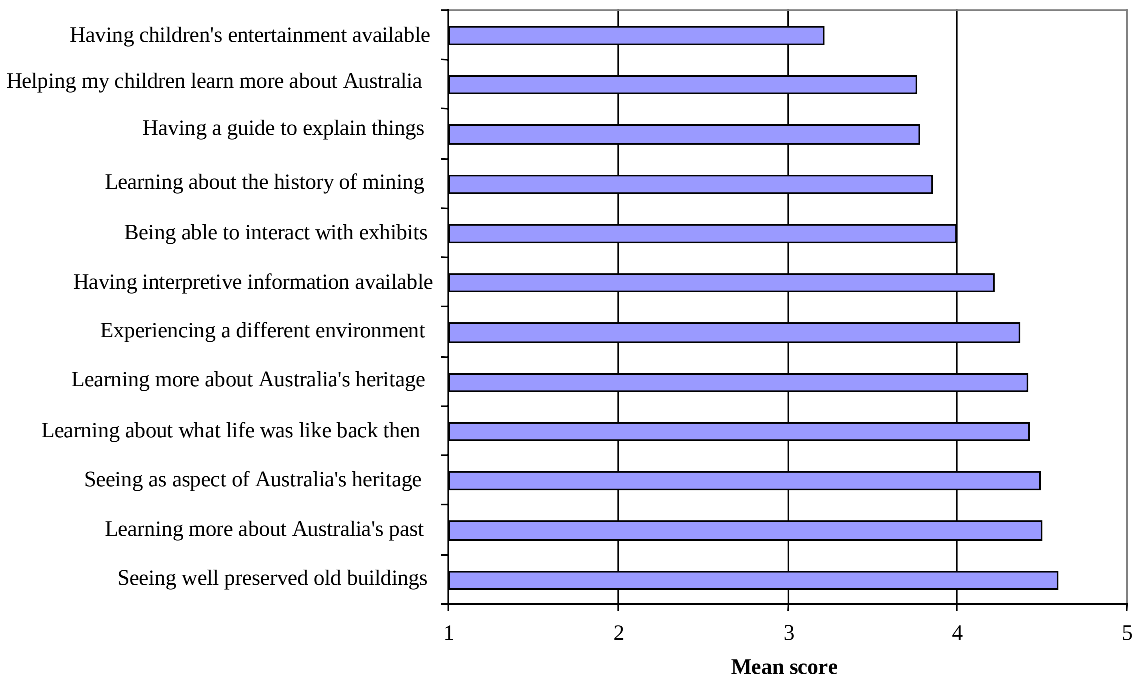
Note: multiple responses were possible.

4.5 Heritage Issues

Figure 4.5 displays the responses to a series of options about attributes of historical mining areas. For each attribute, the figure displays the average rating of the attribute on a 1 to 5 scale where 5 is 'very important' and 1 is 'not at all important'.

There were eight attributes which scored over 4 on this scale and five of them were about the past, old buildings, heritage of Australia etc. The other three were 'having interpretive information available', 'experiencing a different environment' and 'being able to interact with exhibits'. There was less demand for things for children, for interactivity or for a guide.

Figure 4.5 Important Attributes in Heritage Mining Areas



It is also interesting that learning about heritage and learning about the past were virtually indistinguishable, which indicates that people use 'past' and 'heritage' interchangeably. The least important attributes for people were 'Having children's entertainment available' (mean score of 3.22) and 'Having a guide explain things' (mean score of 3.75). This lack of interest in children's activities is a reflection of the fact that less than 2 per cent of visitors to Burra are under 20 years of age, and that over half of the visitors are adult couples.

Leaving aside the children's activities, it is clear from the survey that there is little interest in having a guide, although there is interest in having interpretive information available. There is also little interest in having interactive features. In other words, the typical Burra visitor likes a passive, child-free experience which is well catered for with interpretive information.

Visitors to Burra are very interested in heritage and seeing preserved heritage, with 96 per cent of respondents having visited heritage places other than Burra. Their likes and dislikes at other cultural places are summarised in Table 4.7.

Table 4.7 Visitors' Likes and Dislikes at Heritage Places Other Than Burra

LIKES		DISLIKES	
Feature	Percentage	Feature	Percentage
Good information	72	Overly commercial	47
Good visitor amenities	70	Poor visitor amenities	27
An authentic experience	68	Too crowded	27
Friendly welcome	67	Inadequate information	23
Well-developed attraction	56	Not an authentic experience	18
Peaceful surroundings	56	Poorly developed attraction	16
Nice cafés	44	Unfriendly welcome	13
Shopping for crafts	32	No cafés	11

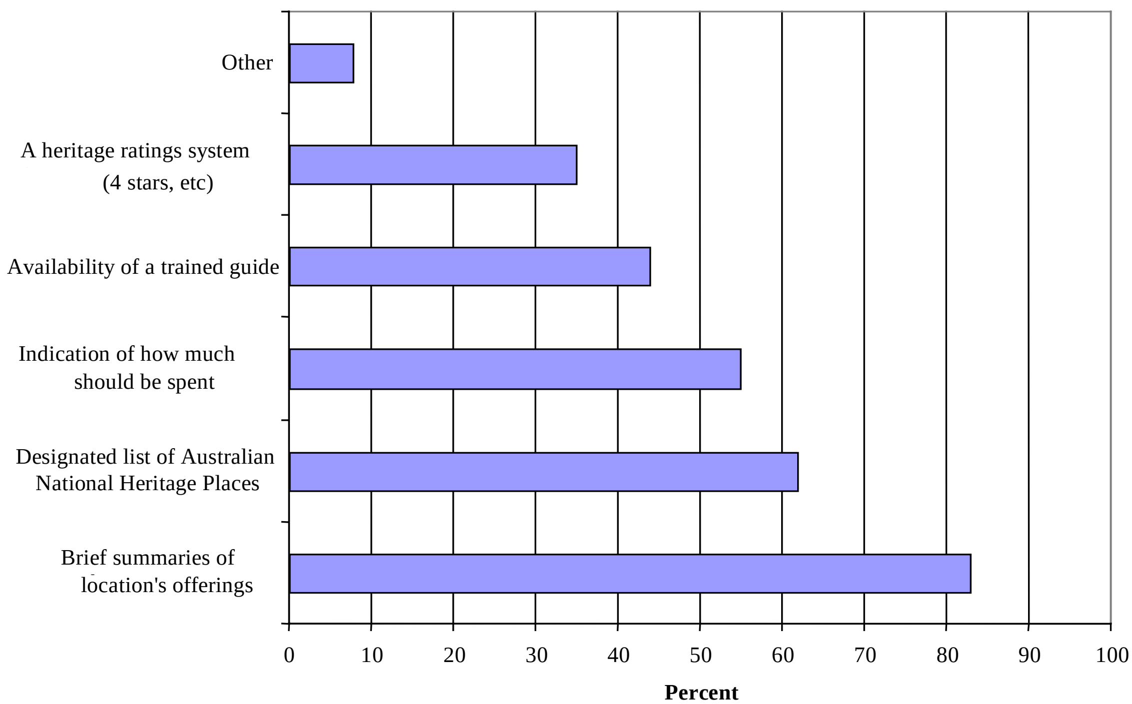
Information, friendliness of the locals, amenities, and authenticity emerge in Table 4.7 as important components of a successful cultural heritage tourism destination. Visitors to Burra were averse to complaining, with the majority of respondents finding no fault at other heritage places. However, there is a clear aversion amongst this segment to too much commercialisation, although the question of how much is 'too much' is a question for further research. There does not appear to be a strong demand for well-developed tourist attractions, suggesting that authenticity rather than novelty or entertainment is the sought after experience.

Other attributes that were mentioned by respondents as 'likes' were 'old buildings' (0.2 per cent), 'correct information' (0.2 per cent), and 'antiques and antique shops' (0.7 per cent). Other dislikes about other heritage places were 'closed shops' (1 per cent), and 'too expensive' (1.4 per cent).

Figure 4.6 shows respondents' ratings of usefulness of information types. This question was posed in terms of what information would be useful when planning a visit to a heritage place, not necessarily a mining place. The most useful type of information was a brief summary, or summaries, of what is offered at each destination. Other types of information were far less popular, with a notable lack of interest in a ratings system, or the availability of a trained guide. While 62 per cent indicated that they would find a national list useful, this was not as popular as 'brief summaries of each location's offerings' (83 per cent).

Combining impressions from Figure 4.6 with those from Tables 4.5 and 4.6 gives an image of a well-defined tourism segment. It is of adult visitors, travelling in pairs, interested in well-preserved heritage buildings. They are also interested in learning more about Australia's past, and have a strong desire for having information on what is on offer at heritage places before they plan a trip, and when they are visiting cultural heritage places.

Figure 4.6 Ratings of Useful Information Types



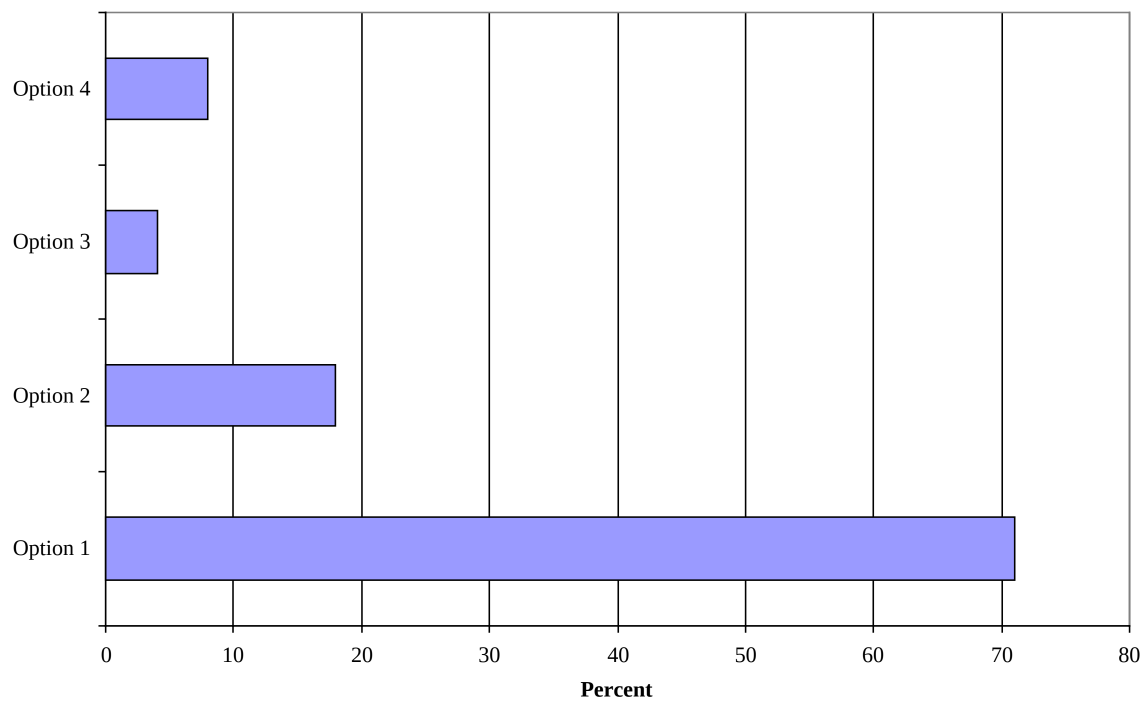
A question which arises in relation to preservation of heritage attractions is who is going to pay for the preservation. With governments of both sides of politics displaying market-based ideologies, it is useful to know how visitors to heritage places rate different funding options.

Respondents were presented with four different models of funding. The descriptions were necessarily brief to allow them to be answered within the interview. They were as follows:

Option 1	A well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation.
Option 2	A well-maintained area, good signage and other information, no heritage tax, substantial commercialisation.
Option 3	Area in gentle decay, minimal information, no heritage tax, no commercialisation.
Option 4	Area in gentle decay, good signage and other information, a $10 per year heritage tax, no commercialisation.

It should be noted that this is clearly not an exhaustive list of options for the management and preservation of heritage places. It is also not an opinion poll of the tax-paying population, so no definitive conclusions can be reached about whether tax revenue should or should not be used to pay for preservation of heritage areas.

Figure 4.7 Heritage Preservation and Funding Choices



Given the above qualifications, it is clear that visitors to Burra have a strong preference for option 1 – ‘a well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation’. This option clearly discounts commercialisation as a source of funds for preservation, and expresses the view that the taxpayer should somehow pay. It also expresses a clear preference for a well-maintained area as opposed to the option of allowing the area to decline into gentle decay.

4.6 Visitor expenditure and economic impact

The survey questionnaire elicited responses on expenditure per person in a number of expenditure categories. Mean expenditure was calculated for each expenditure category and for overall expenditure. Each mean was then multiplied by an estimate of the total annual number of visitors to Burra in order to estimate total annual expenditure per visitor. This was done on a stratified basis in order to improve accuracy of the estimate.

Three strata were used, namely day-trippers, package tourists and overnight stayers. Table 4.8 shows the proportion of visitors in each category, and their mean overall expenditure. Expenditure on packages was allocated to Burra on the basis of the number of nights in Burra as a proportion of the total number of nights included in the package. Note that package tourists also undertook expenditure over and above the package component, especially on shopping

Table 4.8 Tourist Segments and Mean Expenditure Per Person

Segment	Proportion (%)	Mean expenditure ($)
Day-trippers	51	36.33
Package tourists	6	254.51
Overnight stayers	43	175.81
TOTAL	100	109.45

Using Bureau of Tourism research data (Bureau of Tourism Research 2000, Occasional Paper No. 31), the mid-north region of South Australia was estimated to have mean expenditure for domestic visitors of $113.39 for 1998. This compares reasonably well with the sample estimate, even though they are not strictly comparable in terms of years or population base.

The total expenditure in a year by visitors to Burra was estimated by multiplying the mean for each segment and each expenditure category by the annual number of visitors in each segment or stratum. The latter was estimated by using the proportions in Table 4.8 in conjunction with an estimate of the total number of annual visitors to Burra.

There is no official source of data on the total number of visitors to Burra. The pieces of available data are the numbers who use the Visitor Centre (18 500 in the most recent full year); the numbers who use the Burra Passport (10 000 in the most recent full year); and the proportion of total visitors who visited each of the major attractions, calculated from survey results.

If we assume that every Burra visitor who went to the Visitor Centre (18 500) also went to the Burra Mine site (52 per cent of all visitors), the estimated total annual visitation to Burra would be 35 577. On the other hand, if we assume that all visitors to the Visitor Centre also went to the Redruth Gaol and the miners' dugouts (40 per cent), the total annual visitation is estimated at 46 250. The midpoint of these is 40 913, an estimate which found agreement with the staff at the Visitor Centre and the National Trust.

Table 4.9 shows the annual estimated expenditure in each category and for each segment using the estimated total visitation of 40 914. Total annual visitor expenditure is e estimated at $4.48 million, and it is interesting to note that overnight stayers account for 69 per cent of the total expenditure despite being only 43 per cent of the visitor numbers. Day-trippers, who account for 52 per cent of numbers, only account for 17 per cent of expenditure.

The most important overall category of expenditure is accommodation, followed by meals and beverages. This illustrates the economic importance of having visitors stay at least one night. Day-tripper expenditure is not very significant in total compared with overnight stayers, with the largest items of day-tripper expenditure being meals and beverages, shopping and transport. The relatively small number of package tourists (6 per cent) meant that their aggregate expenditure is not great.

Table 4.9 Aggregate Annual Expenditure by Visitors ($)

Category	Day-trippers	Package tourists	Overnight stayers	TOTAL
Accommodation	0	207 254	987 910	1 195 164
Meals and beverages	267 372	165 901	743 084	1 176 357
Transport	234 003	79 489	510 728	824 220
Site entry	43 797	37 757	191 084	272 638
Other entertainment	3 963	11 552	92 381	107 896
Shopping	201 885	127 712	540 585	870 181
Other	6 674	2 765	21 954	31 393
TOTAL	757 694	632 430	3 087 725	4 477 850

The calculation of the economic impact of tourist expenditure is dependent upon the region of interest. If Australia were the region of interest, the economic impact would be small because only 2.7 per cent of visitors were from overseas. The remaining 97.3 per cent of Burra's visitors were residents of Australia and were merely shifting expenditure around Australia, not creating new expenditure for the nation.

In choosing the region of interest for this study, a major consideration was the topicality of small area regional economic development. The smallest region around Burra for which an economic model was available was the Lower North region used by the Australian Bureau of Statistics as a Statistical Division (see Map 4.1).

The Centre for South Australian Economic Studies at the University of Adelaide has developed regional input-output models for statistical divisions of South Australia, including the Lower North. This model enables the calculation of multiplier effects of the Burra visitor expenditure on the wider Lower North regional economy. It specifically takes account of the fact that some of the economic effects of the Burra visitor expenditure occur outside the Lower North Statistical Division, because some of the goods and services involved are produced outside the region, principally in Adelaide.

Table 4.10 shows the impacts of Burra visitor expenditure on total incomes (wage income and gross business income) and employment. The total impact is $5.962 million in terms of incomes, with $4.811 million of this being in Lower North Statistical Division. There are 412 jobs being supported by the visitor expenditure with 333 of these being in the Lower North. The model does not enable the economic effects to be disaggregated into smaller regions such as Local Government Areas, but it would be reasonable to expect that a high proportion of the economic impacts are in the Burra-Clare district.

Map 4.1 Lower North Statistical Division

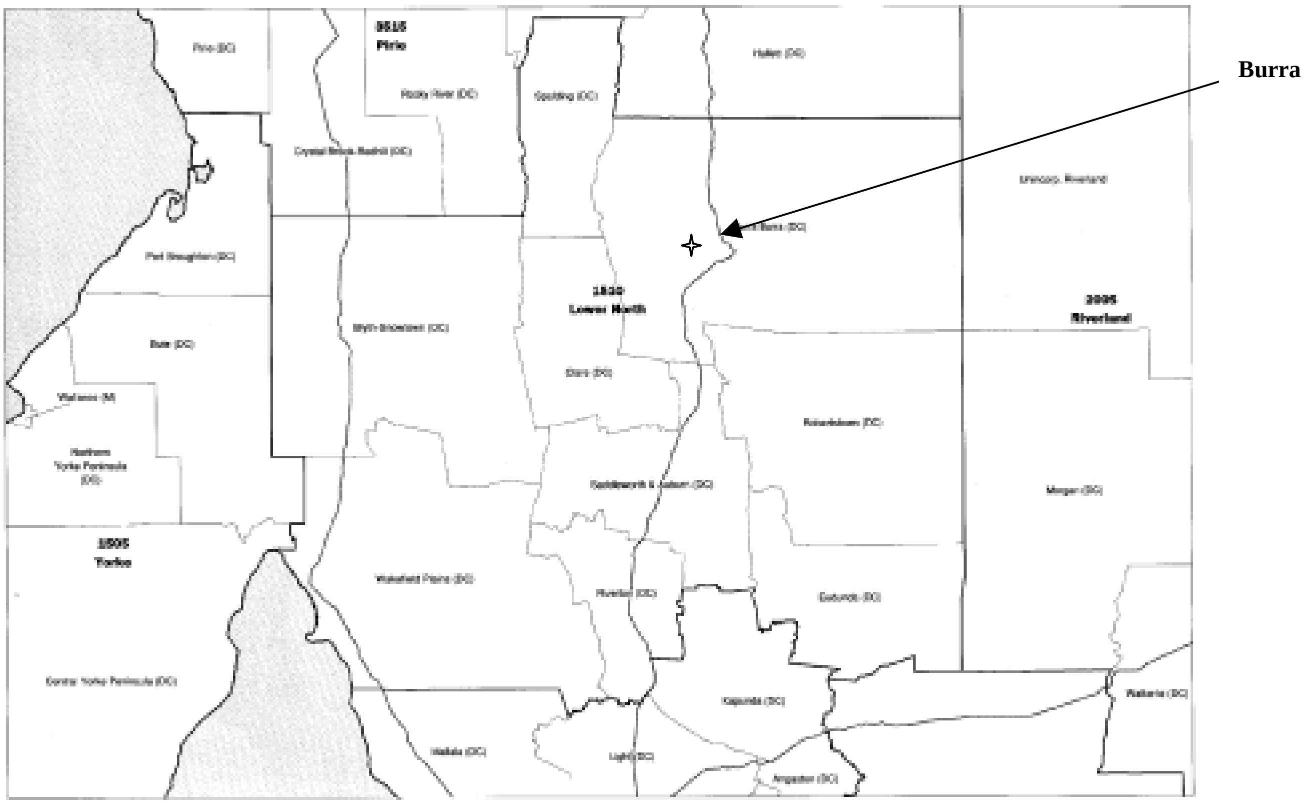


Table 4.10 Annual Economic Impact of Burra Visitor Expenditure

	Regional income ($)	Employment
Within Lower North Statistical Division	4 810 995	333
Outside Lower North Statistical Division	1 150 585	79
TOTAL	5 961 580	412

4.7 Visitor Satisfaction

Successful management of a tourism destination is enhanced by knowledge of the reactions, both positive and negative, of the visitors to the area. The Burra survey sought details on a number of visitor satisfaction issues. The overall satisfaction rating for respondents' visits to Burra is shown in Figure 4.8.

Clearly, with 80 per cent of respondents being very satisfied with their visit, zero being very dissatisfied, and only 0.2 per cent moderately dissatisfied, Burra enjoys an extremely positive position as far as visitor satisfaction is concerned.

Figure 4.8 Overall Satisfaction Rating

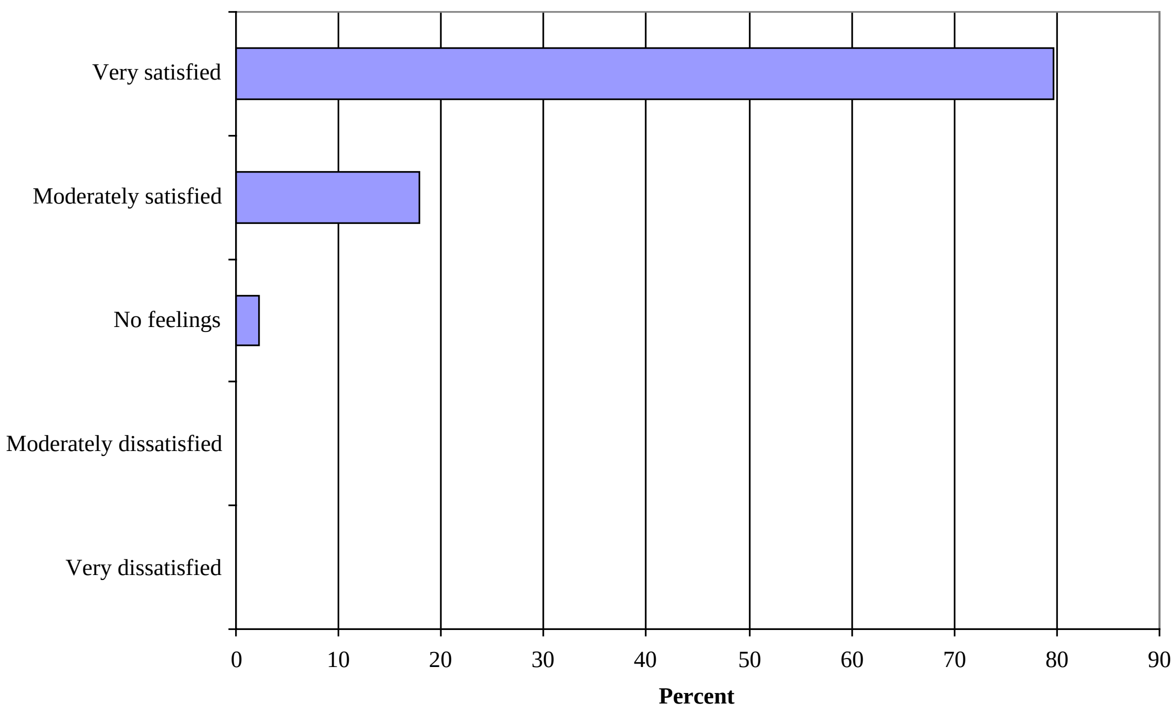
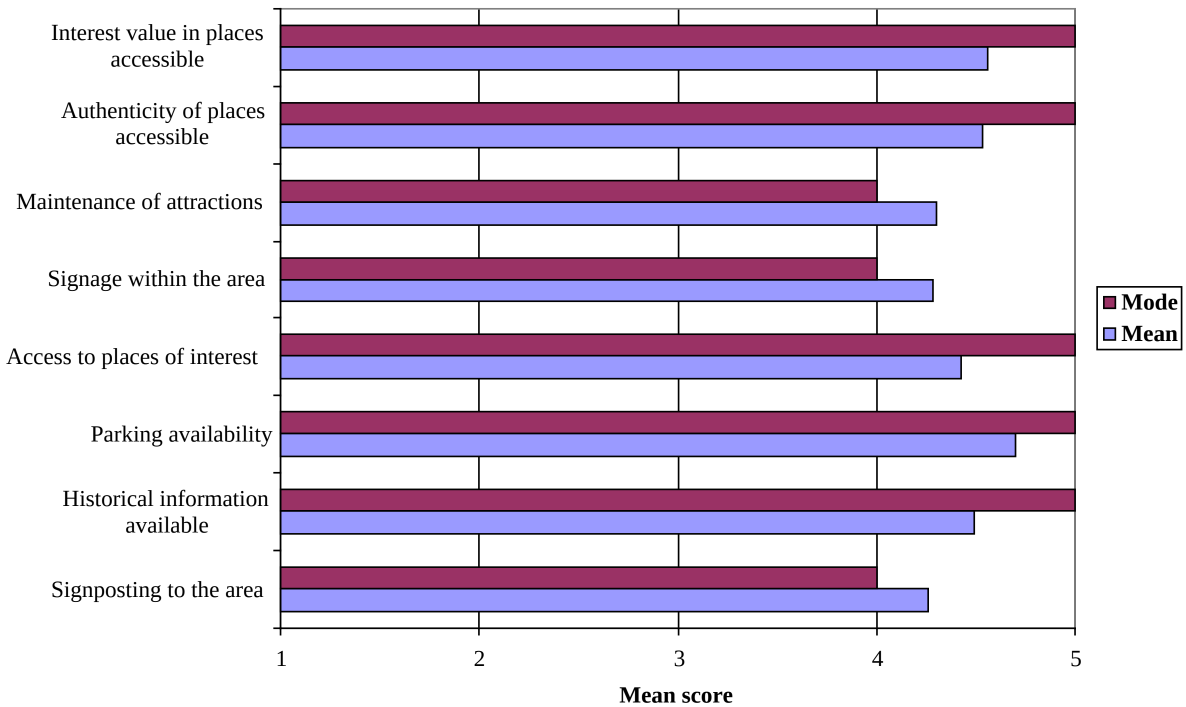


Figure 4.9 Aspects of Visitor Satisfaction



Visitors were asked whether the attributes shown in Figure 4.9 were 'very good' (score of 5), or 'very poor' (score of 1), with scores in between recording intermediate positions. Figure 4.9 shows the mean score for each attribute, plus the mode (most commonly occurring) score.

'Signposting to the area' was the most poorly rated aspect, with 'Signage within the area' not far behind, and 'Parking availability' being the most highly rated. Also highly rated were the 'Interest value in places accessible', 'Authenticity of places accessible' and 'Historical information available'. Whether visitors are equipped to judge 'authenticity' is perhaps debatable but – if it is like beauty, in the eye of the beholder – at least visitors to Burra are of the strong opinion that they are experiencing authentic places.

Finally, visitors were asked open-ended questions about the best and worst aspects of their visit. Amongst the best aspects, words like 'heritage' and 'history' (17 per cent), 'friendliness' (5.3 per cent), 'quiet and relaxing' (4.1 per cent) and 'peaceful' (4.6 per cent) appeared frequently. Also mentioned were the environment, antiques and accommodation. Clearly, the town has a strong image in this area which is working well in the minds of visitors.

Apart from the cold weather (12.4 per cent), the most frequently occurring annoyance was with shops not being open (4.9 per cent). There were also a significant number of complaints about the toilets being dirty, flies, about having to leave and about being a respondent in a survey. All things considered, it would appear from this that shops being closed and dirty toilets are the main grievances that are within human influence.

CHAPTER 5 THE CHARTERS TOWERS STUDY

5.1 Background

Charters Towers is situated inland in the Burdekin River Valley of North Queensland, approximately 135 kilometres south-west of the coastal port of Townsville on the Flinders Highway. Charters Towers was declared a municipality in 1877 and proclaimed a city in 1909.

Gold was first discovered in 1871; however, as with other gold mining communities, the gold boom dramatically declined by the 1920s. At this time, the beef cattle industry and the first-class education and health facilities were integral to the city's survival. The city's population peaked at 27 000 during the gold boom almost 125 years ago, and today stands at 10 000.

Charters Towers is currently experiencing an economic boom through the resurgence of the mining industry, a concerted effort in establishing a tourism base, and the continued contributions from its foundation industries such as cattle and education. Renewed confidence in the city has prompted the Charters Towers and Dalrymple Tourism Association to promote industry and business in the city to ensure Charters Towers will not re-experience the decline that followed the end of mining.

The National Trust owns more buildings in Charters Towers than anywhere else in Queensland. The historic buildings in Gill Street and other parts of the city, such as the Stock Exchange, City Hall, the Australian Bank of Commerce, and the post office, are prime examples of old-world architecture. A strong sense of the city's gold rush history and wealthy heritage has been maintained. The City Council has implemented measures that will hopefully encourage property owners to retain the city's heritage. The buildings provide a link to the past and nostalgia is primarily what many visitors are looking for. The $8 million performing arts centre, the World Theatre, opened in September 1996 and has been incorporated into the historic 1891 Australian Bank of Commerce building. The complex will be a constant reminder of the region's past, as Charters Towers was known as 'The World' in its heyday.

Although the region is currently expanding its economic base into tourism, Charters Towers is facing a challenging tourism season, as visitor numbers are down significantly compared with previous years. The Tourist Information Centre collects data on the number of visitors who use the Centre. Visitation for February 2000 was 412 compared with 586 in February 1999. However, January visitation was slightly up at 763 compared with 693 for the same time in 1999.

5.2 The 2000 Charters Towers Visitor Survey

The study surveyed visitors to the city over the period from 15 April to 4 June 2000 inclusive using face-to-face interviews. Interviewers were recruited locally with the assistance of the Charters Towers Tourist Information Centre. The interviewers were given training in Charters Towers on 14 April.

Interviews were conducted on midweek days and every weekend over the survey period, except for the Easter long weekend, so as to avoid interviewing a large sample of visitors that were in Charters Towers for the Country Music Festival. Interviewing was conducted mostly in the main street of town, Gill St; Mosman Street, which houses the Tourist Information Centre, and a number of heritage buildings and museums; and at the Venus Gold Battery, one of the city's major mining tourist attractions. Interviewers were instructed to approach people at random, and to move around the main shopping precinct in order to reduce the chances of bias that could occur if they were to stay in one location.

A total of 435 interviews were conducted, comprising 157 (36 per cent) day-trippers, 13 (3 per cent) people on package tours, and 265 (61 per cent) overnight stayers other than those on package tours. Data from the survey was analysed using the SPSS package. The results are presented in the following sections:

- Visitor Characteristics
- Visitor Behaviour
- Heritage Issues
- Visitor Expenditure and Economic Impact
- Visitor Satisfaction

5.3 Visitor characteristics

Figure 5.1 below shows that the majority (58 per cent) of people travelling to Charters Towers travelled in groups of two, with 21 per cent of visitors in groups of four or more. The median group size was two.

Figure 5.1 Size of Charters Towers Groups

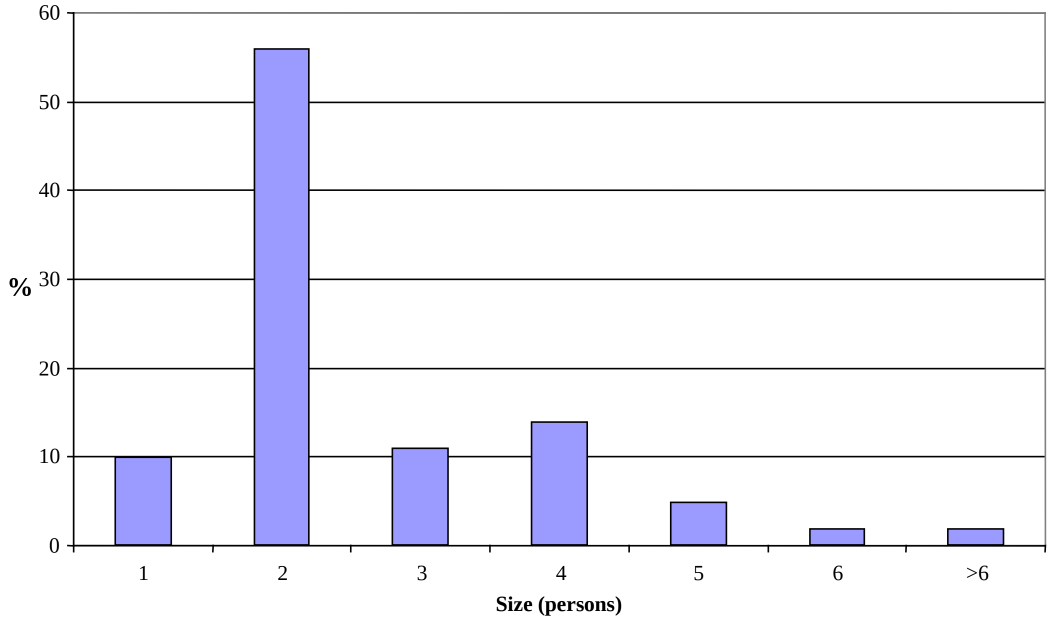


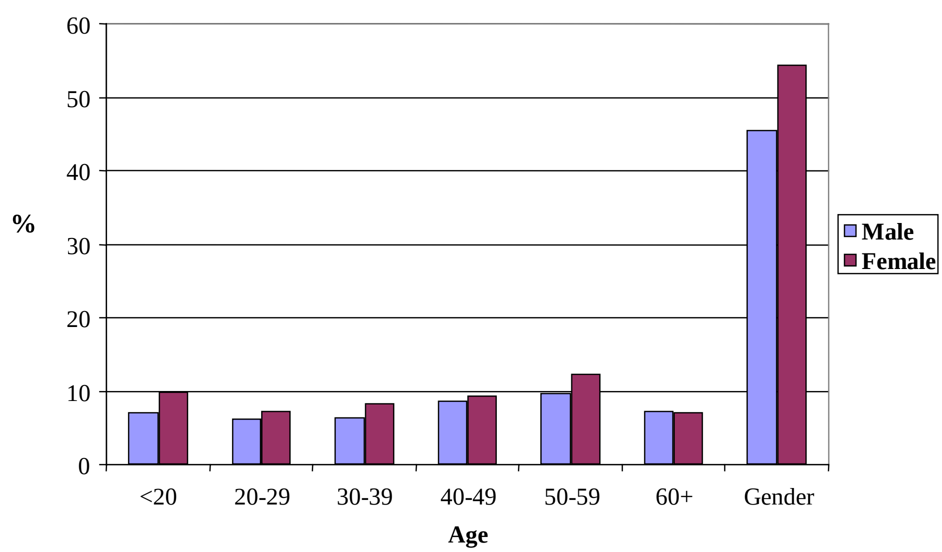
Table 5.1 shows how visitors found out about Charters Towers. The table indicates that the majority (44 per cent) of visitors have previous knowledge of Charters Towers. Of these visitors, 78 per cent live in Queensland. A large proportion (38 per cent) found out about Charters Towers through their friends, which has positive implications as visitors go home and tell their friends about the positive experiences they had. However, word of mouth can only have a positive effect if there is a high level of visitor satisfaction. Travel guidebooks have been successful in promoting Charters Towers, as 31 per cent of visitors used them as a source of information. Although 10 per cent of visitors found out about Charters Towers through the 'local tourist authority', it is difficult to interpret from the results whether this was specifically Charters Towers Tourist Information Centre. The term 'local tourist authority' is ambiguous and an unfortunate choice of words in the design of the questionnaire. More useful information may have been obtained if the Charters Towers Tourist Information Centre was identified separately. Table 5.1 shows that there is more opportunity for Charters Towers to communicate with its potential tourist market through Queensland Travel and Tourism Corporation, motoring associations, travel shows on television, magazines and the Internet.

Table 5.1 How Visitors Found Out About Charters Towers

Information source	Percentage
Previous knowledge	44
From friends	38
Travel guidebook	31
Local tourist authority	10
State tourist authority	7
Motoring association	4
TV program	4
Magazine article	4
Web/Internet	3
Radio program	2
Newspaper story	1

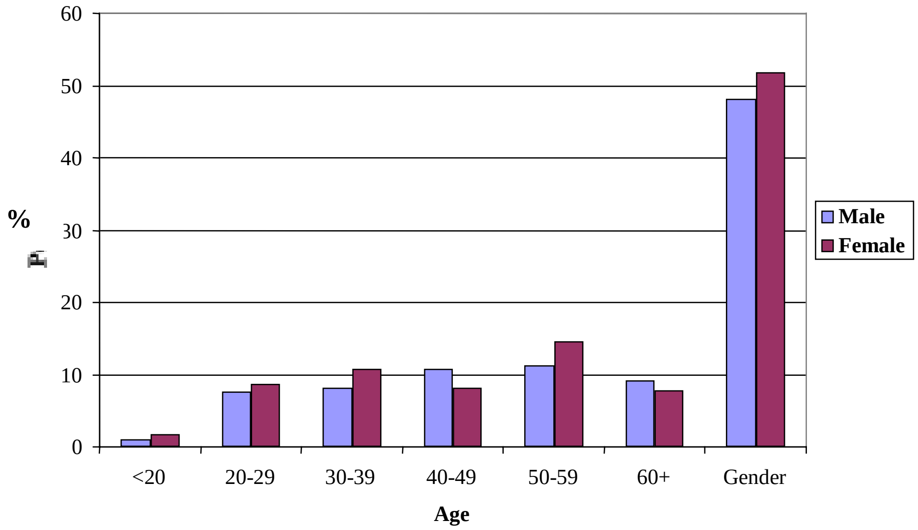
Figure 5.2 shows the age and gender of visitors and Figure 5.3 shows the age and gender of survey respondents. As Figure 5.2 indicates, visitors are spread across all age groups, with a slightly higher proportion of visitors aged 50–59 years. Figure 5.2 also shows that there is a higher level of visitation by females than males (54 per cent[17] compared with 46 per cent). Overall, females were also more likely than males to be surveyed (52 per cent compared with 48 per cent overall), except for those aged 40–49 years and 60 years and over. The age of visitors and respondents are similar; except for the under-20 years age group, which represent a higher proportion of visitors than respondents. This can be explained by the methodology used for the study, where respondents were aged 16 years or over.

Figure 5.2 Visitors' Ages and Genders



[17] The Z value was 1.63, which is significant at 10 per cent.

Figure 5.3 Respondents' Ages and Genders



The origins of visitors are shown in Table 5.2. This table is based upon a grouping of respondents according to their postcodes. It should be noted that these are respondents' postcodes only, and may not correspond exactly to all visitors' postcodes. For example, where a respondent was from Townsville, but was showing Charters Towers to guests from Brisbane, the Brisbane postcodes would not be recorded. Nevertheless, it is expected that this will balance out over the whole sample.

Table 5.2 Origins of Visitors to Charters Towers

Origin	Percentage
Overseas	16
Townsville	10
Near Charters Towers	5
Other Queensland	37
Victoria	7
Sydney	6
Other New South Wales	10
Other Australia	9

As expected, the majority (52 per cent) of Charters Towers visitors reside in Queensland, as Charters Towers is in North Queensland and a reasonable distance from other States. As Queensland attracts a significant number of international visitors, especially to the Great Barrier Reef, there is a large proportion of international visitors travelling to Charters Towers. The majority of international visitors come from the United Kingdom, or other parts of Europe, and New Zealand.

Table 5.3 Visitors' Leisure Activities

Leisure activity	Percentage
Country drives	78
Going to a restaurant	70
Visiting heritage buildings	66
Cinemas	65
Visiting a national park	64
Reading general history	58
Reading Australian history	58
Visiting a museum	57
Bushwalking	52
Theatre, opera, ballet	28
Popular concerts	27
Overseas holiday	25

Note: multiple responses were possible.

Table 5.3 shows the rankings of visitors' leisure activities. Multiple responses to this question were possible, which means that the responses do not total to 100. Over three-quarters of visitors like to go for country drives, and a large proportion are interested in the usual leisure activities such as going to restaurants and the cinema. The results indicate that Charters Towers visitors have a high level of interest in history and preservation, as the majority of respondents had visited heritage buildings, national parks and museums, and read general and Australian history in the last six months. These activities are more popular for visitors than organised entertainment such as the performing arts or popular concerts.

5.4 Visitor Behaviour

The median length of stay was 24 to 36 hours, and 79 per cent of visitors spent more than eight hours in Charters Towers. Of the visitors who stayed overnight, the most popular length of stay was one night, with the average length of stay being three nights. Nearly two-thirds of visitors who stayed overnight stayed two or more nights in Charters Towers.

Figure 4.4 displays the distribution of nights stayed in Charters Towers. As the figure indicates, day-trippers and one-night stayers dominate the market. Tourism promotion agencies could increase the economic benefits of tourism by encouraging these visitors to stay longer. This could be achieved by developing package tours which include several nights in the region, or by emphasising that the town is not a pass-through destination, but a place which takes several days to explore.

Figure 5.4 Nights Stayed in Charters Towers

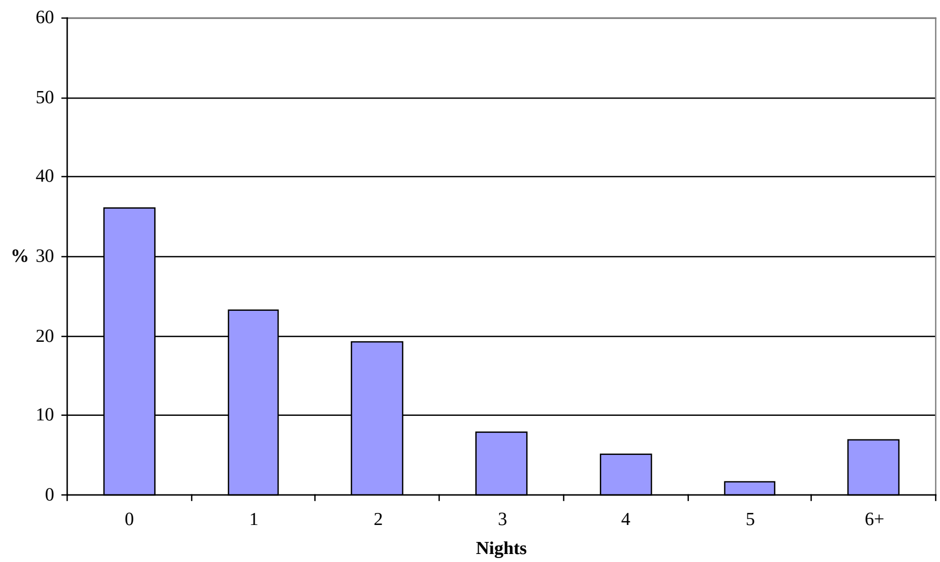


Table 5.4 shows the main types of accommodation used by people staying overnight in Charters Towers. As the table indicates, caravan parks are a very popular accommodation choice for visitors to Charters Towers (41 per cent). The town has three caravan parks, with another one opening mid-2000, and attracts a large number of visitors who are members of motor home associations and retirees travelling around Australia in caravans or motor homes. Apart from caravan parks, a large proportion of accommodation establishments in Charters Towers are hotels and motels, which is reflected in the results, with 29 per cent of visitors choosing stay in this type of accommodation. It is interesting that only 6 per cent of visitors stayed in bed and breakfast establishments and that nearly one-quarter of visitors stayed with friends or relatives.

Table 5.4 Types of Accommodation Used

Type of accommodation	Percentage
Caravan park	41
Hotel/motel	29
Friends/relatives	22
Bed and breakfast	6
Other	2
Host accommodation	<1
Self-contained cottage	<1
TOTAL	100

Table 5.5 shows the main reasons that people had for visiting Charters Towers. The most popular reason for visiting Charters Towers was ‘Holidays’ (33 per cent), which could be explained by the large number of people travelling through Charters Towers as a side trip to their holiday on Australia’s north coast, or by the large proportion of overseas visitors. The second most popular reason was to see the town’s heritage sites (21 per cent), followed by ‘Visiting friends and relatives’ (13 per cent) and ‘Side trip from Townsville’ (13 per cent). ‘Other’ reasons given were ‘passing through’ (1 per cent), and ‘country music festival’ (1 per cent).

Table 5.6 shows the proportion of visitors that visited each of Charters Towers’ attractions. The two most popular places, the Stock Exchange building and the World Theatre building are situated next door to the Tourist Information Centre, at the end of the main street, which could explain the high rates of visitation to these attractions. The Stock Exchange building is home to the National Trust of Queensland Charters Towers office, the Assay Mining Museum, a café and several other businesses. The historic post office is in the main street of Charters Towers, so visitors find it hard to miss as they walk up the main street. Charters Towers has 13 parks, which appear to be popular for visitors. Visiting old homes is popular for visitors, as the town has many historic homes whose architecture has been restored. The mining heritage attractions, such as the Venus Gold Battery, Zara Clarke Museum and the Assay Mining Museum, were not as popular as those with a general historical theme. However, they still received a reasonable level of visitation.

Table 5.5 Main Reason for Visiting Charters Towers

Reason	Percentage
Holidays	33
To see heritage sites	21
Visit friends/relatives	13
Side trip from Townsville	13
Personal	6
Passing through	5
Business	3
Short break	2
Other	2
Education/conference/seminar	1
Sport	1
TOTAL	100

Table 5.6 Places Visited

Place visited	Percentage
Stock Exchange building	75
World Theatre building	72
Historic post office	54
Parks	43
Sightseeing old homes	39
Venus Gold Battery	37
Rotary Lookout	30
Zara Clark Museum	29
Assay Mining Museum	25
Boer War Memorial Rotunda	23
Antique shops	23
Ay-Ot Lookout	22
Other	21
Pfieffer House	18
Old Court House	18
School of Mines	12

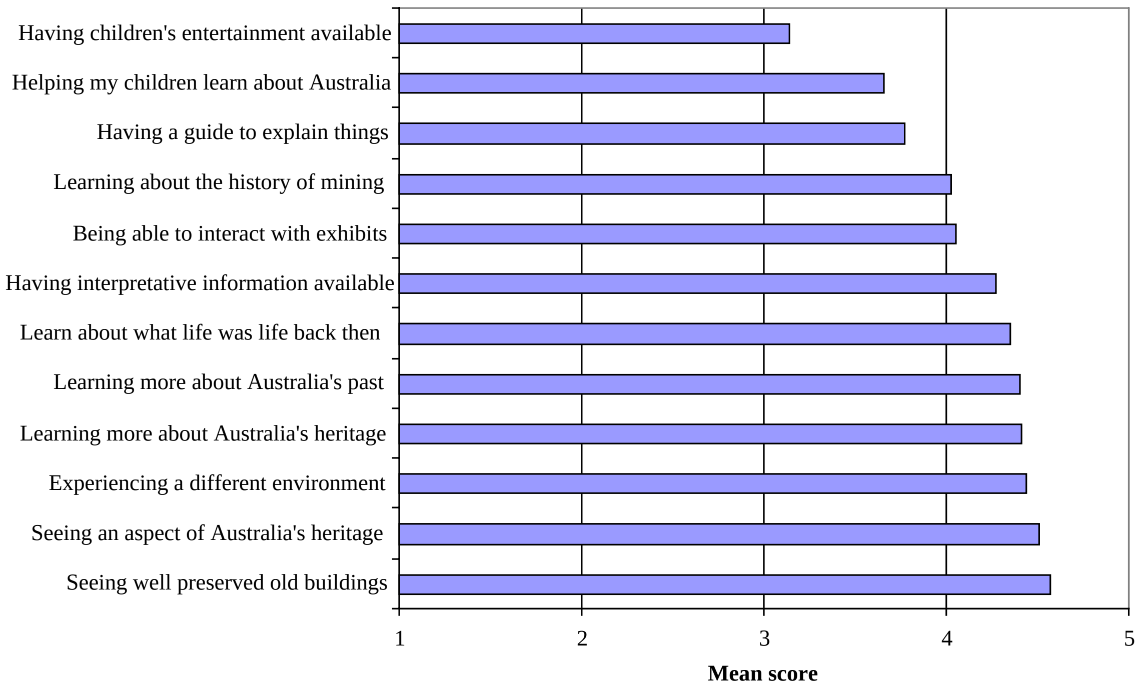
5.5 Heritage Issues

Figure 5.5 displays the responses to a series of options about attributes of historical mining areas. For each attribute, the figure displays the average rating of the attribute on a 1 to 5 scale where 5 is ‘very important’ and 1 is ‘not at all important’.

The two most popular attributes were ‘Seeing well-preserved old buildings’ (mean score of 4.57) and ‘Seeing an aspect of Australia’s heritage’ (4.51). Respondents rated the ‘seeing’ options more highly than the ‘learning’ options of ‘Learning more about Australia’s past’ (4.4) and ‘Learning more about Australia’s heritage’ (4.41); however, statistically the difference is not large enough to allow a firm conclusion.

The least important attributes for visitors to Charters Towers were ‘Having children’s entertainment available’ (3.14) and ‘Helping my children learn about Australia’ (3.66). This lack of interest in children’s activities is reflected in the low proportion of visitors aged 20 years and under and the high proportion of visitors that are adult couples.

Figure 5.5 Important Attributes in Heritage Mining Areas



Interest in heritage and seeing preserved heritage is shown by visitors to Charters Towers, with a large proportion (79 per cent) of respondents having visited heritage places other than Charters Towers. Their likes and dislikes at other cultural places are summarised in Table 5.7.

Table 5.7 Visitors' Likes and Dislikes at Heritage Places Other Than Charters Towers

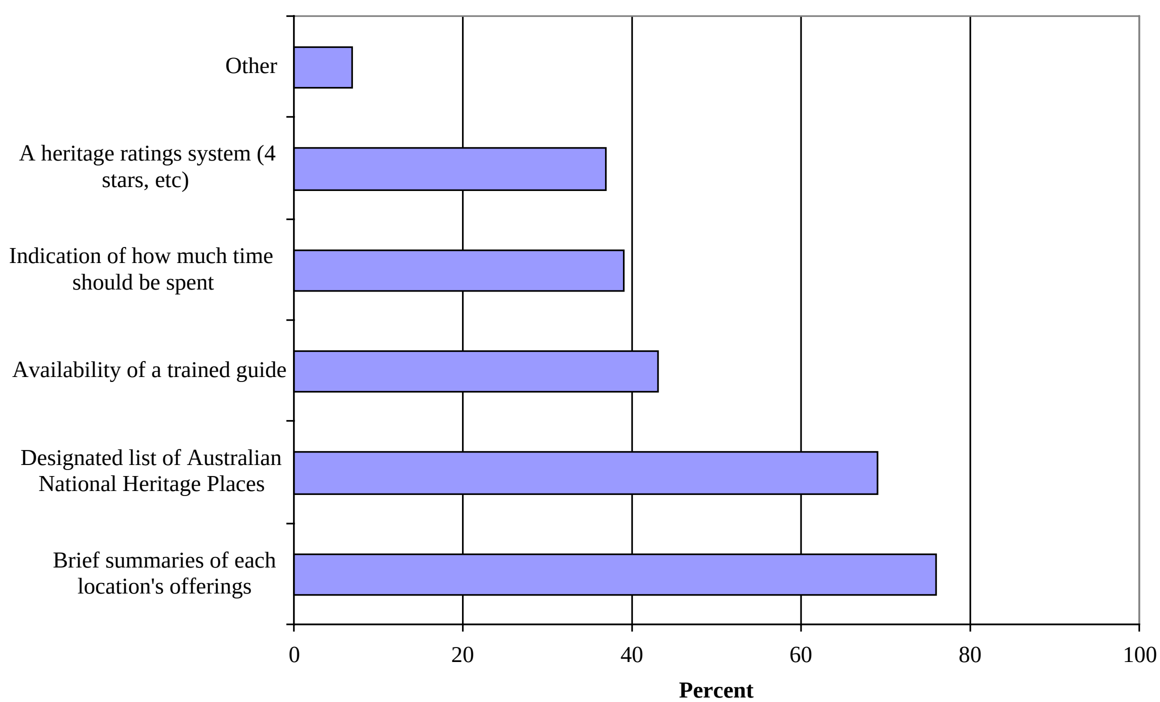
LIKES		DISLIKES	
Feature	Percentage	Feature	Percentage
Friendly welcome	63	Poor visitor amenities	34
Good information	58	Overly commercial	33
Good visitor amenities	55	Inadequate information	30
An authentic experience	52	Too crowded	26
Well developed attraction	43	Unfriendly welcome	25
Peaceful surroundings	40	Poorly developed attraction	22
Nice cafés	36	Not an authentic experience	21
Shopping for crafts	29	No cafés	16

Table 5.7 indicates that a friendly welcome, good information and visitor amenities rate highly with Charters Towers visitors as successful features of heritage tourism destinations. It is interesting that only just over one-half of respondents expressed a desire for an authentic experience at cultural heritage destinations. The results suggest that there is little demand for commercialisation of heritage destinations or well-developed attractions. It also appears that cafés and crafts are not important components of a heritage tourism destination.

Other attributes that were mentioned by respondents as ‘likes’ were ‘access’ (0.2 per cent), ‘good-value food’ (0.2 per cent), ‘old mines’ (0.2 per cent), presentation (0.2 per cent) and ‘helpful people’ (0.2 per cent). Other dislikes about other heritage places were ‘prices too high’ (0.8 per cent), ‘weather’ (0.6 per cent), ‘poor signage’ (0.4 per cent), ‘dirty toilets’ (0.2 per cent), ‘no information centres’ (0.2 per cent), and ‘opening hours’ (0.2 per cent).

Figure 4.6 shows how respondents rated the usefulness of information types. This question was posed in terms of what information would be useful when planning a visit to a heritage place, not necessarily a mining place. The most useful type of information was a brief summary of what is offered at each destination. A designated list of Australian National Heritage Places also emerged as a popular type of information for planning a trip to a heritage place. A heritage ratings system did not rate very highly as a useful planning guide, nor did an indication of how much time should be spent at the destination.

Figure 5.6 Ratings of Useful Information Types



Results from Figure 5.6 and Tables 5.6 and 5.7 combine to give a profile of a heritage tourism segment. This segment consists of adults travelling with a partner, interested in preserved heritage buildings. They are also interested in having information about what is on offer at heritage places before they plan a trip, and they are interested in the significance of the heritage values of destination attractions. Some of the 'Other' suggestions for information types were an indication of prices (3 per cent), and maps showing attractions and places of interest (1.5 per cent).

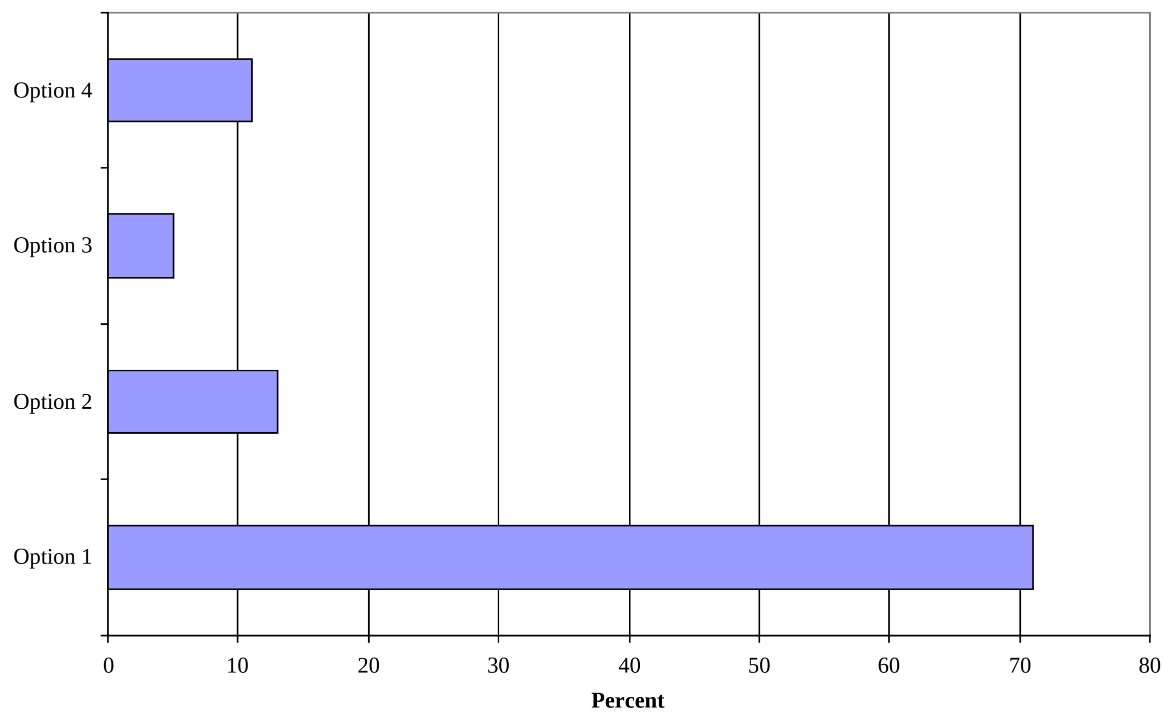
A question which arises in relation to preservation of heritage attractions is who is going to pay for the preservation. With governments of both sides of politics displaying market-based ideologies, it is useful to know how visitors to heritage places rate different funding options.

Respondents were presented with four different models of funding. The descriptions were necessarily brief to allow them to be answered within the interview. They were as follows:

Option 1	A well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation.
Option 2	A well-maintained area, good signage and other information, no heritage tax, substantial commercialisation.
Option 3	Area in gentle decay, minimal information, no heritage tax, no commercialisation.
Option 4	Area in gentle decay, good signage and other information, a $10 per year heritage tax, no commercialisation.

It should be noted that this is clearly not an exhaustive list of options for the management and preservation of heritage places. It is also not an opinion poll of the tax-paying population, and so no definitive conclusions can be reached about whether tax revenue should or should not be used to pay for preservation of heritage areas.

Figure 5.7 Heritage Preservation and Funding Choices



It is clear from Figure 5.7 that the vast majority of visitors to Charters Towers have a strong preference for option 1 – ‘a well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation’. This suggests that commercialisation should not be used as a source of funds for the preservation of heritage, and indicates that visitors believe the taxpayer should contribute to preservation. The high support for option 1 also indicates that visitors prefer a well-maintained area as opposed to one that is allowed to ‘run down’ into gentle decay.

5.6 Visitor Expenditure and Economic Impact

There are no definitive counts of the total number of visitors to Charters Towers, but data provided by Tourism Queensland and the National Visitor Survey has enabled an estimation to be calculated. Research was undertaken by Tourism Queensland (2000) from major source markets (Sydney, Melbourne, Brisbane, regional Queensland, Mackay, Gold Coast and Sunshine Coast) with 1600 respondents who had: (a) been on a holiday in the past three years of more than three days duration; and (b) been to Tropical North Queensland and/or Townsville. The results of the Tourism Queensland research indicate that of all domestic visitors to Townsville, approximately 7 per cent visited Charters Towers on their last trip. The 1998 National Visitor Survey, undertaken by the Bureau of Tourism Research (BTR), indicates that Townsville attracted 839 000 domestic visitors in 1998 (BTR 1998) (the 1999 results are currently being reviewed by BTR). This equates to 58 730 domestic visitors to Charters Towers. Our survey and the Tourism Queensland statistics indicate that approximately 16 per cent of visitors to Charters Towers are from overseas. Annual visitation by international tourists to Charters Towers therefore equates to 11 187. By combining domestic visitation and international visitation, Charters Towers receives an estimated 69 917 visitors per annum, a figure which found agreement with staff at Tourism Queensland and the Charters Towers and Dalrymple Tourism Association. These figures are shown in Table 5.8.

Table 5.8 Annual Visitation to Charters Towers

Domestic visitors to Townsville (BTR 1998)	839 000
Domestic visitors to Charters Towers (Tourism Queensland 2000)	58 730
International visitors to Charters Towers	11 187
TOTAL ANNUAL VISITATION TO CHARTERS TOWERS	69 917

Using results from the survey, another estimate of visitor numbers was calculated. The results of the survey indicate that 29 per cent of respondents had visited the Zara Clark Museum. Annually, 5000 visitors attend the museum. Therefore, using this method, annual visitation to Charters Towers was estimated at 17 065. When comparing the two estimates of 17 065 and 69 917, it appears that due to the sampling methodology, the study did not capture a large proportion of tourists to Charters Towers that pass through briefly and do not visit the heritage attractions. These tourists are likely to drive into Charters Towers, fill their tanks with petrol, stop for lunch or a break from their trip, and then leave the town without visiting any of the heritage attractions. Therefore, a large proportion of these day-trippers were not captured, suggesting that the 36 per cent day-tripper proportion reflected in the survey results is in fact significantly higher. The 17 065 estimate is a more accurate reflection of the number of visitors who visit the heritage attractions in Charters Towers. This found agreement with staff at Tourism Queensland.

Table 5.9 shows how a more accurate reflection of visitation to Charters Towers was calculated. The estimated 17 065 visitors was proportioned to day-trippers, package tourists and overnight stayers according to the proportions in the survey results. The remaining 52 852 visitors to Charters Towers were then added to the number of day-trippers to make up the total visitation of 69 917 as calculated above. Therefore, day-trippers make up approximately 84 per cent of visitors to Charters Towers, with overnight stayers being 15 per cent of total visitation, and package tourists representing only 1 per cent.

Table 5.9 Tourist Segments to Charters Towers

	Proportion as per survey (%)	Heritage tourists	Day-trippers not captured by survey	TOTAL	Proportion (%)
Day-trippers	36	6 143	52 852	58 995	84
Package	3	512	n/a	512	1
Overnight stayers	61	10 410	n/a	10 410	15
TOTAL	100	17 065	52 852	69 917	100

The survey questionnaire elicited responses on expenditure per person in a number of expenditure categories. Mean expenditure was calculated for each expenditure category and for overall expenditure. Each mean was then multiplied by an estimate of the total annual number of visitors to Charters Towers in order to estimate total annual expenditure per visitor. This was done on a stratified basis in order to improve accuracy of the estimate.

Three strata were used, namely day-trippers, package tourists and overnight stayers. Table 5.10 shows the proportion of visitors in each category and their mean overall expenditure. Expenditure on packages was allocated to Charters Towers on the basis of the number of nights in Charters Towers as a proportion of the total number of nights included in the package. Note that package tourists also undertook expenditure over and above the package component, especially on shopping.

Table 5.10 Tourist Segments and Mean Expenditure Per Person

Segment	Proportion (%)	Mean expenditure ($)
Day-trippers	84	61.37
Package tourists	1	188.48
Overnight stayers	15	232.44
TOTAL	100	87.77

Data from the Bureau of Tourism Research (Bureau of Tourism Research 2000, *Tourism Expenditure by Domestic Visitors in Regional Australia, 1998*, Occasional Paper No. 31) enabled an estimate of domestic visitor expenditure in the Northern region of Queensland. For 1998 this was $121.32, compared with $87.77 in the Charters Towers case. The difference is due to a number of factors, including the lack of strict comparability in the two visitor populations. In particular, the present study for Charters Towers is heavily influenced by the high proportion of day-trippers compared with the Northern region average.

The total expenditure in a year by visitors to Charters Towers was estimated by multiplying the means for each segment and each expenditure category by the annual number of visitors in each segment or stratum. The latter was estimated by using the proportions in Table 5.10 in conjunction with an estimate of the total number of annual visitors to Charters Towers.

Table 5.11 shows the annual estimated expenditure in each category and for each segment using the estimated total visitation of 69 917. Total annual expenditure is estimated at $6.137 million. The most important overall category of expenditure is transport, followed by meals and beverages and shopping. Due to the high proportion of day-trippers, expenditure for this category of visitor was higher than overnight stayer expenditure for most categories. Accommodation was the largest expenditure item for overnight stayers, with transport, shopping, and meals and beverages also contributing a large proportion. The majority of day-trippers' expenditure was on transport, meals and beverages, and shopping. Package tourists make up very little of total expenditure, as this segment only accounts for 1 per cent of total visitors.

The calculation of the economic impact of tourist expenditure is dependent upon the region of interest. If Australia were the region of interest, the economic impact would be small because only 16 per cent of visitors were from overseas. The remaining 84 per cent of Charters Towers visitors were residents of Australia and were merely shifting expenditure around Australia, not creating new expenditure for the country.

Table 5.11 Aggregate Annual Expenditure by Visitors ($)

Category	Day-trippers	Package tourists	Overnight stayers	TOTAL
Accommodation	0	27 010	586 604	613 614
Meals and beverages	1 036 542	20 473	495 204	1 552 219
Transport	1 266 623	17 191	547 254	1 831 067
Site entry	258 988	3 488	94 939	357 416
Other entertainment	32 447	3 841	126 273	162 562
Shopping	977 547	23 075	513 525	1 514 147
Other	48 376	1 424	55 902	105 702
TOTAL	3 620 523	96 503	2 419 700	6 136 726

Economic impact on the Northern Statistical Division was estimated using an input-output model for the region based on a Queensland Treasury model for 1989–90 and updated to 1999. This model enables calculation of multiplier effects of the Charters Towers visitor expenditure. It specifically takes into account the fact that some of the economic effects of visitor expenditure in Charters Towers occur outside the Northern statistical area, because some of the goods and services involved in visitor expenditure are produced outside of the district. Map 5.1 shows the boundaries of the Northern Statistical Division of Queensland.

Map 5.1 Queensland Statistical Divisions

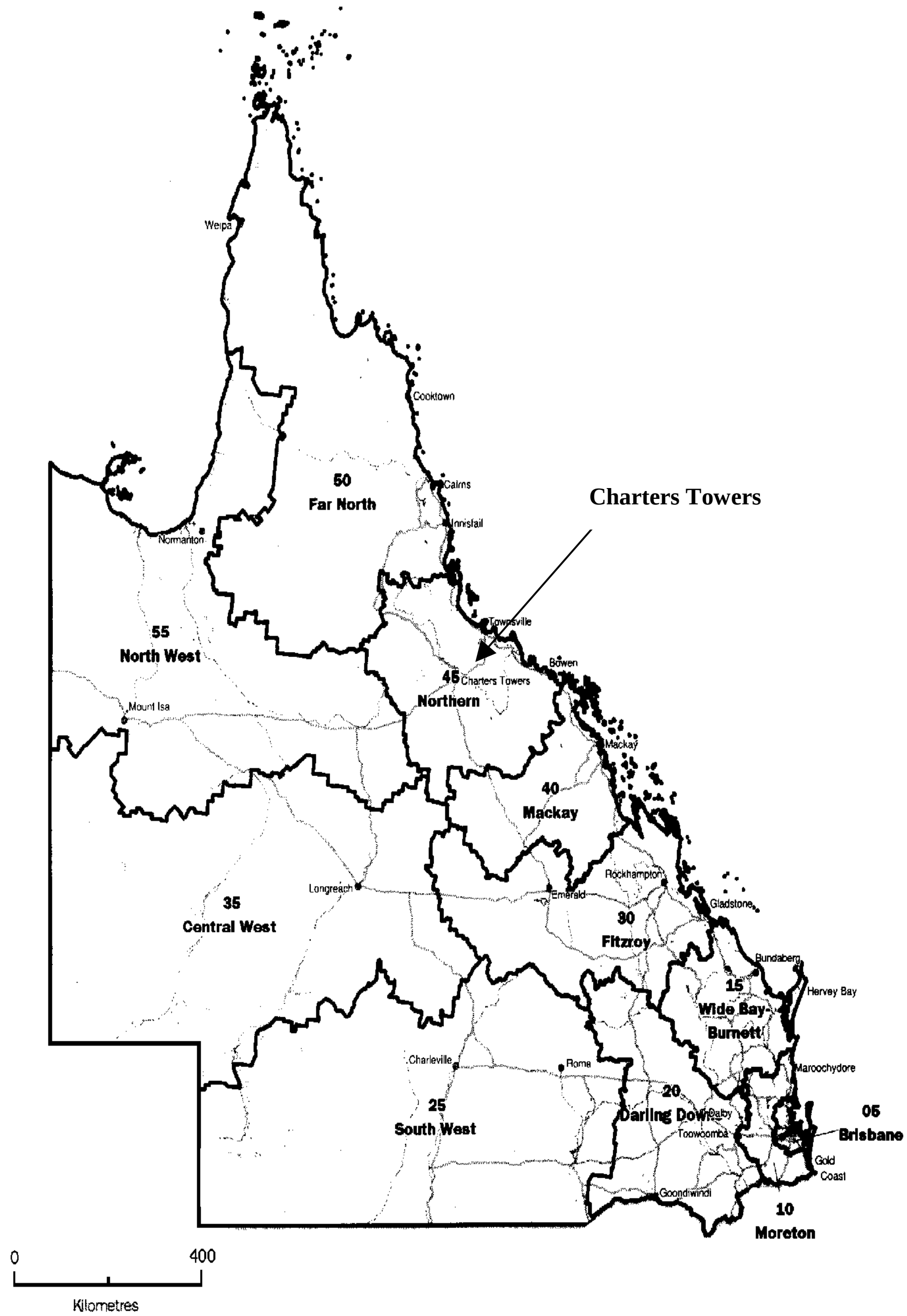


Table 5.12 shows the impacts of Charters Towers visitor expenditure on total incomes (wage income and gross business income) and employment. The total impact is $8.738 million in terms of incomes, with $6.128 million of this being within the Northern Statistical Division. There are 173 jobs being supported by the visitor expenditure with 121 of these being in the Northern Statistical Division.

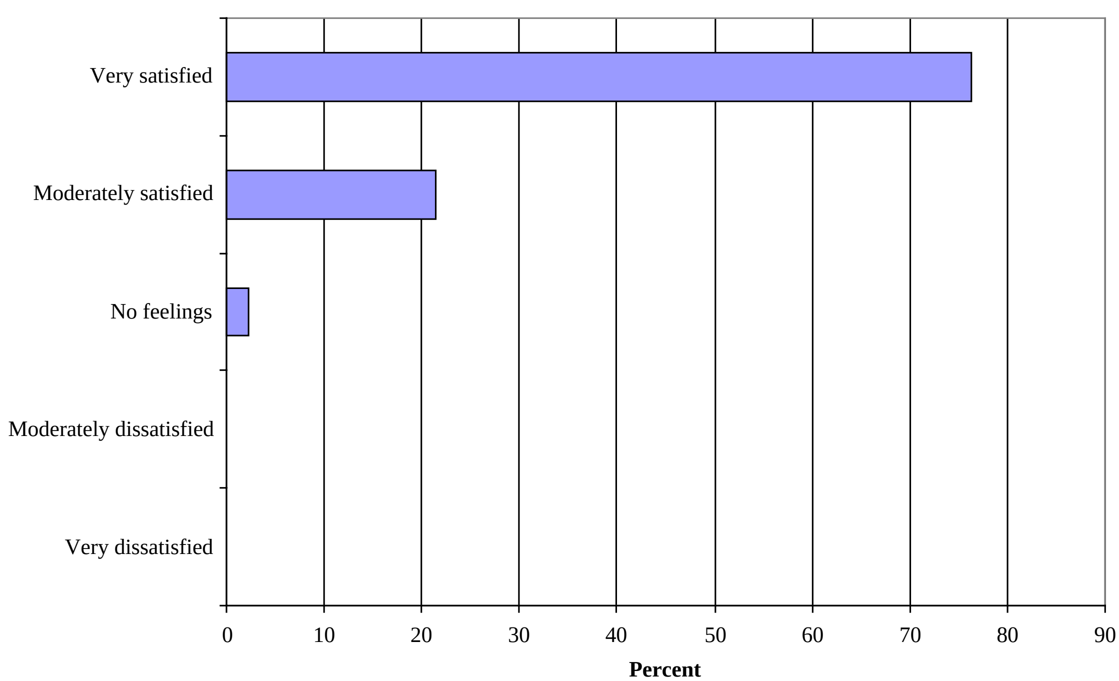
Table 5.12 Annual Economic Impact of Charters Towers Visitor Expenditure

	Regional income ($)	Employment
Within Northern Statistical Division	6 127 729	121
Outside Northern Statistical Division	2 610 413	52
TOTAL	8 738 142	173

5.7 Visitor Satisfaction

A knowledge of visitors' overall satisfaction with a tourism experience, and satisfaction with its various components, is crucial to ensure that a tourism destination is sustainable and continues to attract visitors. Successful management of an area can improve the delivery of services and product, leading to increased visitor satisfaction. The Charters Towers survey sought details on a number of visitor satisfaction issues. The overall satisfaction rating for respondents' visit to Charters Towers is shown in Figure 5.8.

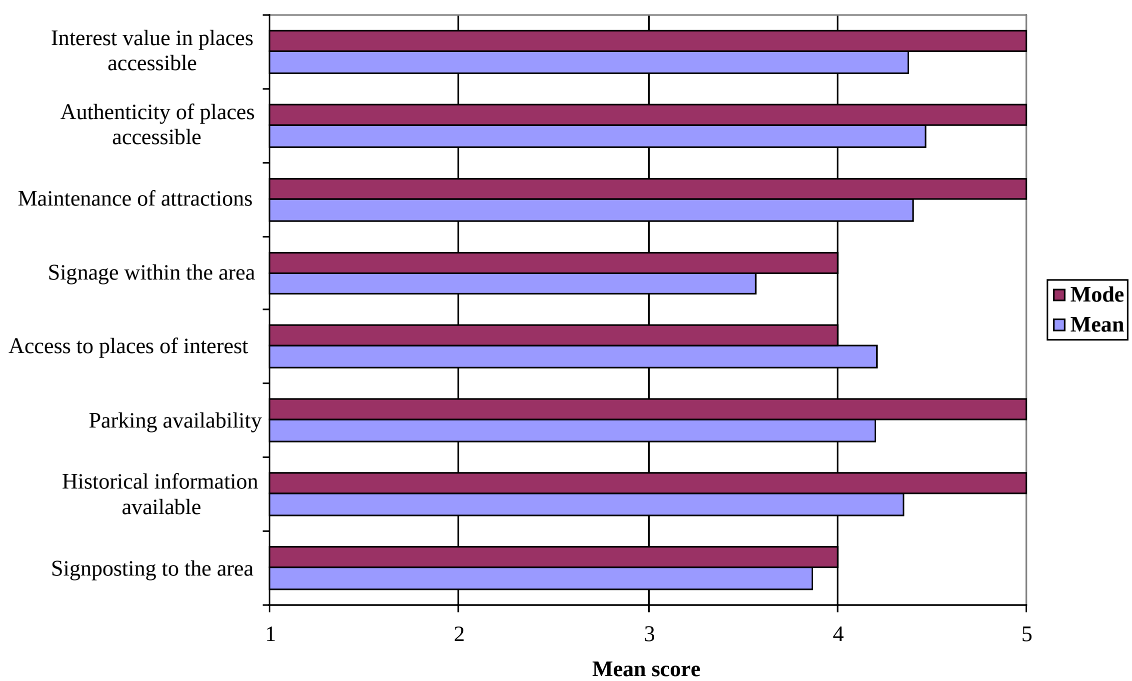
Figure 5.8 Overall Satisfaction Rating



Charters Towers has achieved a very high level of visitor satisfaction, with over three-quarters (76 per cent) of respondents being very satisfied with their visit, and zero being moderately or very dissatisfied.

Visitors were also asked whether attributes shown in Figure 5.9 were ‘very good’ (score of 5) or ‘very poor’ (score of 1), with scores in between recording intermediate positions. Figure 5.9 shows the mean score for each attribute, plus the mode (most commonly occurring) score.

Figure 5.9 Aspects of Visitor Satisfaction



Aspects that relate to the attractions and heritage of the area were rated highly, as opposed to more ancillary aspects of the tourism product such as signage and parking. ‘Signage within the area’ was the most poorly rated aspect, with the ‘Authenticity of places accessible’ being the most highly rated.

Although signposting was not rated as highly as other aspects, its should not be considered as poor, as the mode score for both signage within the area and signposting to the area is ‘good’. However, it should be noted that 28 per cent of respondents rated signposting to the area as average, poor or very poor, and 44 per cent of respondents rated signage within the area as average or worse.

To complement the visitor satisfaction ratings, visitors were asked open-ended questions about the best and worst aspect of their visit. The most frequent responses were ‘friendliness’, ‘cleanliness’, ‘beautiful town’, ‘lovely town’, ‘beautiful buildings’, ‘heritage’ and ‘peaceful’. It is clear that Charters Towers leaves a very good impression on visitors with respect to these aspects.

The most common complaint was that people did not have enough time to spend at Charters Towers. This is reflected in the responses in Figure 4.6 where 39 per cent of respondents thought that an indication of how much time to spend in the area would assist them in planning their trip. Visitors commented that they were not aware that there was so much to see. This is also reflected in Figure 4.6, where the majority of respondents (76 per cent) indicated that they would find useful a brief summary of what the area had to offer. Another major complaint concerned the opening hours of shops, especially on the weekends. Other complaints include mosquitoes, difficulty in finding toilets and the weather.

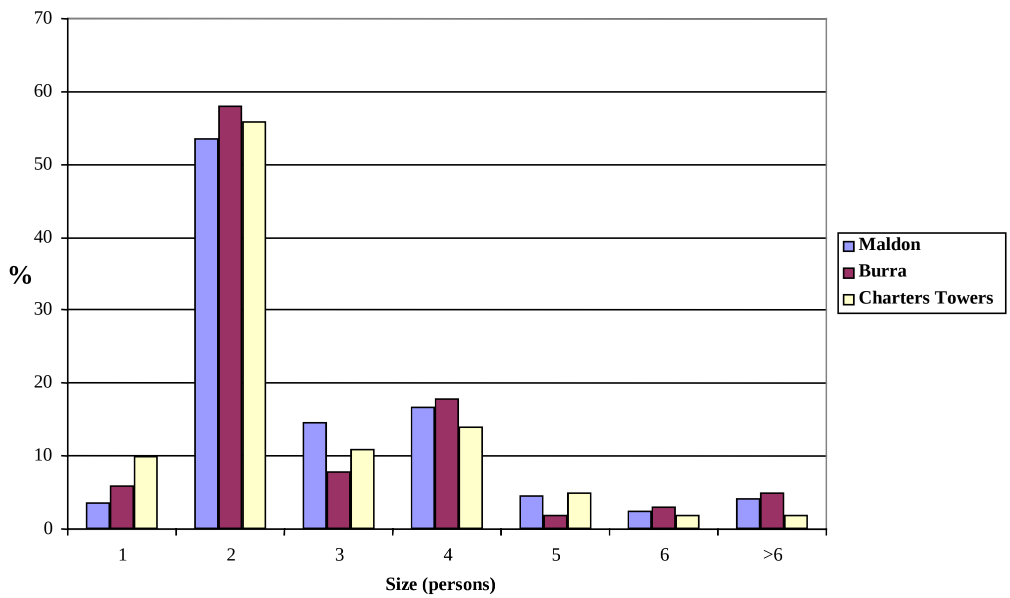
CHAPTER 6 A TALE OF THREE TOWNS

The previous three sections have detailed the findings of visitor surveys in each of Maldon, Burra and Charters Towers separately. In this section we compare the findings for the three towns in order to identify common threads or differences. We employ the same framework as was used for each of the individual towns.

6.1 Visitor Characteristics

The pattern of visitor group size is very similar for the three towns, with two persons being the dominant size, as shown in Figure 6.1. There is also a minor mode size at four persons in each town. Charters Towers has slightly more singles and slightly less groups of six or more people than the other two towns.

Figure 6.1 Size of Visitor Groups

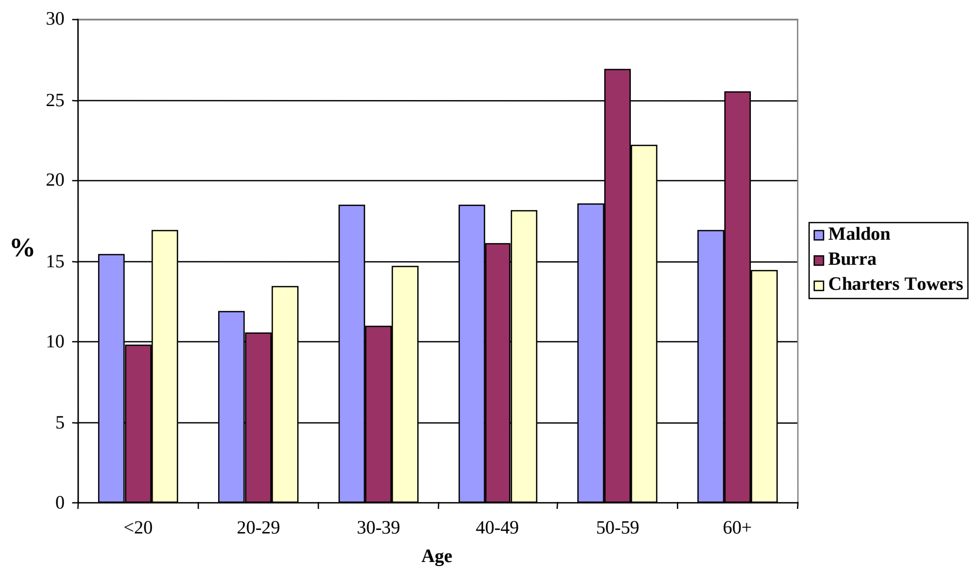


There are some very interesting comparisons between the three towns in terms of how visitors found out about the destinations, as shown in Table 6.1. For Maldon, 'friends' are clearly the dominant information source, while for the other two towns the category 'always known' is dominant. Travel guidebooks are a significant source for Charters Towers, but not for Burra or Maldon. The Internet is not particularly significant as an information source in any of the towns. Of the three destinations, Charters Towers seems to have a more even spread of sources and is less dependent on one particular source than Maldon and Burra.

Table 6.1 How Visitors Found Out About the Destination

	Percentage		
Information source	Maldon	Burra	Charters Towers
Always known/previous knowledge	1	66	44
From friends	63	20	38
Travel guidebook	6	7	31
Local tourist authority	7	3	10
State tourist authority	6	4	7
Motoring association	2	3	4
TV program	5	4	4
Magazine article	6	1	4
Web/Internet	1	1	3
Radio program	1	1	2
Newspaper story	9	2	1

Figure 6.2 Visitors' Age



Visitors' age is displayed in Figure 6.2 and shows Burra with an older age profile and Maldon with a younger profile. Charters Towers' profile tends to be quite middle aged, around the 40–60 bracket.

Table 6.2 shows the gender of visitors, with the patterns being very similar at each place with a significant female majority (the percentage of females was significantly above 50 per cent at either 10 per cent or 5 per cent level of significance). Thus the dominant form of visitor for Burra is older females, for Charters Towers it is middle-aged females and for Maldon a slight emphasis towards younger females.

Table 6.2 Gender of Visitors

	Percentage		
Gender	Maldon	Burra	Charters Towers
Male	45	46	46
Female	55	54	54

Some interesting differences emerge from a comparison of the origins of visitors shown in Table 6.3. Charters Towers appears to be more successful in attracting international visitors, but this may be related to the fact that more international visitors go to Queensland and to North Queensland than to Victoria and South Australia. Maldon has a strong reliance on visitors from Melbourne, whereas Burra relies on both Adelaide and other States as sources. Maldon is less successful at attracting visitors from New South Wales than both Burra and Charters Towers. The vast majority (81 per cent) of visitors to Maldon come from within Victoria itself; whereas Burra relies on South Australia to generate approximately 59 per cent of its visitors and Charters Towers receives just over half of its visitors from Queensland.

Table 6.3 Origins of Visitors

	Percentage		
Origin	Maldon	Burra	Charters Towers
Overseas	6	3	16
Nearest largest city	47	39	10
Elsewhere in State	34	20	42
New South Wales	7	11	16
Other States	6	27	16

Finally in this section, visitors' leisure activities are compared in Table 6.4. While the patterns are broadly similar, visiting heritage buildings is a more popular activity with Burra visitors than with visitors to the other places, possibly because Burra has had a history of preservation of heritage assets and involvement in promoting cultural heritage tourism. Relative to the other towns, Maldon visitors do not appear to be as interested in reading about either Australian history or general history. This may be a function of the high percentage of day-trippers from Melbourne in Maldon's visitor profile.

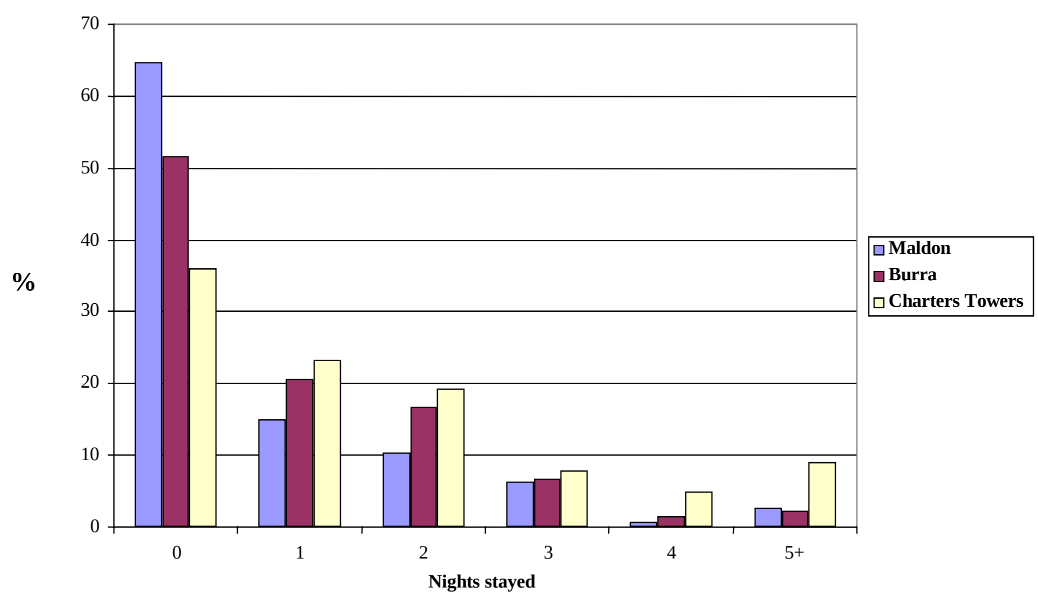
Table 6.4 Visitors' Leisure Activities

	Percentage		
Leisure activity	Maldon	Burra	Charters Towers
Country drives	88	91	78
Going to a restaurant	81	76	70
Visiting heritage buildings	60	71	66
Cinemas	65	56	65
Visiting a national park	59	66	64
Reading general history	39	53	58
Reading Australian history	42	51	58
Visiting a museum	41	57	57
Bushwalking	48	56	52
Theatre, opera, ballet	26	32	28
Popular concerts	25	28	27
Overseas holiday	20	15	25

6.2 Visitor Behaviour

All three destinations had a predominance of day-trippers, as is shown in Figure 6.3. This was especially marked for Maldon.

Figure 6.3 Number of Nights Stayed



Of the three destinations it appears that Charters Towers is most successful at having visitors stay for multiple nights, with 9 per cent staying five or more nights, compared with only 2.3 per cent for Burra and 2.7 per cent for Maldon. This phenomenon is possibly a function of location as well as the range of attractions.

Table 6.5 Types of Accommodation Used

	Percentage		
Type of accommodation	Maldon	Burra	Charters Towers
Caravan park	25	27	41
Hotel/motel	19	17	29
Friends/relatives	22	14	22
Bed and breakfast	n/a	16	6
Other	13	3	2
Host accommodation	n/a	2	<1
Self-contained cottage	n/a	21	<1
Farm stay	2	1	n/a
Guest house	16	n/a	n/a
Serviced apartment	2	n/a	n/a

The caravan park is clearly a very popular form of accommodation for this tourism activity, particularly for Charters Towers. Staying with friends and relatives is least used in Burra.

Table 6.6 summarises the main reason for visiting in each case. The heritage attractions were the main single reason for Maldon and Burra, but having a holiday was the main reason for Charters Towers. Education was an important component of the 'Other' category for Burra (7 per cent), but not for the other two. Caution should be exercised with this finding as it may be a case of sampling variability.

Table 6.6 Reason for Visit

	Percentage		
Reason	Maldon	Burra	Charters Towers
To see heritage sites	28	25	21
Holidays	9	15	33
Visit friends/relatives	12	9	13
Side trip	n/a	n/a	13
Short break	27	9	2
Other	25	42	18

6.3 Heritage Issues

A key aspect of this study is the interest that visitors have in various attributes of cultural heritage. In particular, there is interest in knowing whether visitors' preferences are for information, entertainment, authenticity and education. In advance of the study, there was an expectation that visitors may also be interested in destinations where children's entertainment is available. Of course it is worth noting that since these destinations are not child-focused attractions, there may be an element of self-selection in that visitors who have a need for children's entertainment are more likely to be found at other destinations which have such facilities.

Table 6.7 Important Attributes in Heritage Mining Areas

	Score		
	Maldon	Burra	Charters Towers
Having children's entertainment available	2.74	3.22	3.14
Helping my children learn more about Australia	3.06	3.78	3.66
Having a guide explain things	3.32	3.75	3.77
Learning about the history of mining	3.47	3.86	4.03
Having interpretive information available	3.90	4.22	4.27
Being able to interact with exhibits	3.97	4.00	4.05
Learning about what life was like back then	4.17	4.43	4.35
Learning more about Australia's past	4.22	4.50	4.40
Learning more about Australia's heritage	4.24	4.42	4.41
Experiencing a different environment	4.34	4.37	4.44
Seeing an aspect of Australia's heritage	4.49	4.49	4.51
Seeing well-preserved, old buildings	4.61	4.60	4.57

In Table 6.7 the mean score for each attribute in each destination is shown. The attributes were ranked on a scale of 1 to 5, where 5 is 'very important' and 1 is 'not at all important'. The patterns are very similar in each destination with 'seeing' attributes being more important than 'learning' attributes. There is clearly not a strong demand for children's entertainment or for having a guide. While there is some emphasis on interaction, it is less important than seeing and learning.

The evidence from Table 6.7 is that cultural heritage is equated with 'preserved old buildings'. That is, it is seen as a tangible thing rather than an intellectual or abstract concept such as lifestyle, commercial organisation or social behaviour. Again there may be a case of self-selection at work, in that the chosen places for the study all feature strong themes of well-preserved buildings and streetscapes rather than themes of lifestyle or social and commercial behaviour[18].

[18] It is also not a simple function of the type of information provided to tourists, for all three places have literature and information on the nature of life and work for the miners and their families in the 1800s.

Table 6.8 What Visitors Liked at Other Heritage Places

	Percentage		
Likes	Maldon	Burra	Charters Towers
Friendly welcome	54	67	63
Good information	64	72	58
Good visitor amenities	69	70	55
An authentic experience	68	68	52
Well-developed attraction	40	56	43
Peaceful surroundings	58	56	40
Nice cafés	51	44	36
Shopping for crafts	38	32	29

The pattern of 'likes' shown in Table 6.8 is similar at all three destinations. Good information, good amenities and friendliness are clearly important and rank above cafés, crafts and a developed attraction. Authenticity is very popular among Maldon and Burra visitors, but less so with visitors to Charters Towers.

The pattern of 'dislikes' is shown in Table 6.9. It appears as if Maldon and Burra visitors had little to complain about from visits to other heritage places, with their biggest complaint being too much commercialisation. Charters Towers visitors were more concerned that they had elsewhere experienced an unfriendly welcome or inadequate information.

It would be dangerous to draw too many conclusions about general tourism and places of cultural heritage significance form this information, because all three samples were drawn from people who were already displaying an interest in this form of tourism by virtue of the place they were visiting. However, good information and good amenities appear to be desirable characteristics of a successful tourism destination based upon cultural heritage attractions.

Table 6.9 What Visitors Disliked at Other Heritage Places

	Percentage		
Dislikes	Maldon	Burra	Charters Towers
Unfriendly welcome	16	13	25
Inadequate information	27	23	30
Poor visitor amenities	39	27	34
Not an authentic experience	21	18	21
Poorly developed attraction	14	16	22
Overly commercial	61	47	33
No cafés	13	11	16
Too crowded	48	27	26

Since the provision of information is a keenly felt issue with visitors, it is of interest to observe the pattern of ratings of information types shown in Table 6.10. It seems clear that people would find brief summaries of a place's heritage attractions more useful than a star ratings system or a designated list such as a national register. This is common to all three locations.

Table 6.10 Ratings of Useful Information Types

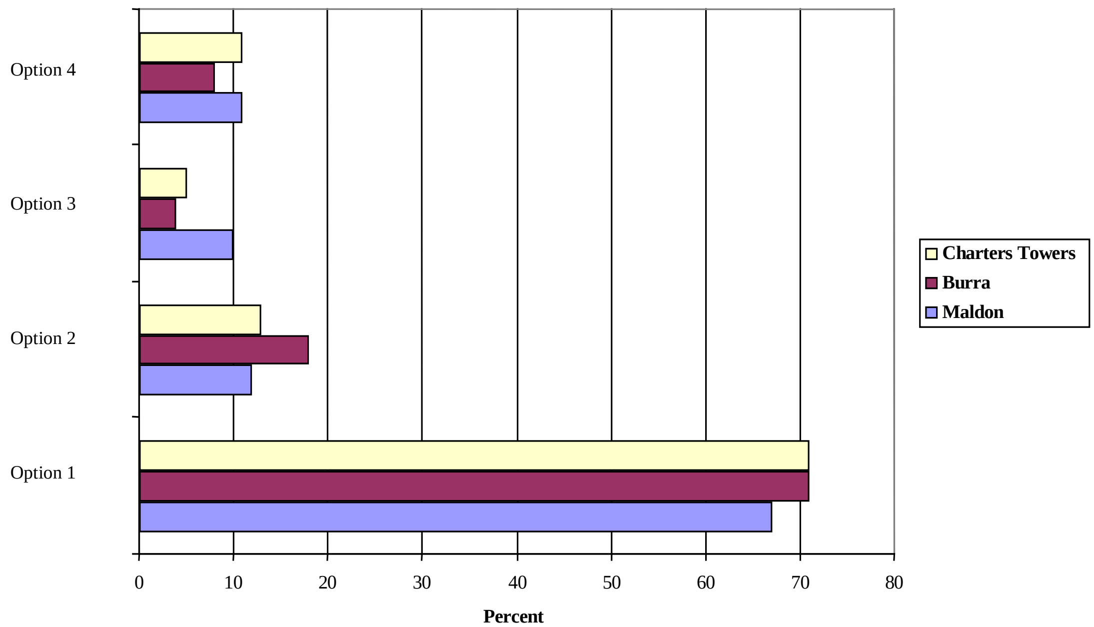
	Percentage		
	Maldon	Burra	Charters Towers
Brief summaries of each location's offerings	91	83	76
Designated list of Australian National Heritage Places	74	62	69
Indication of how much time should be spent	50	55	39
A heritage ratings system (4 stars etc.)	47	35	37
Availability of a trained guide	32	44	43
Other	11	8	7

The question of who is going to pay for the preservation of cultural tourism assets was framed in terms of different options. This question is topical because of the perception that governments may not be willing to pay and that other funding options may be necessary. The responses to funding options are shown in Figure 6.4. It will be recalled that the options were:

Option 1	A well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation.
Option 2	A well-maintained area, good signage and other information, no heritage tax, substantial commercialisation.
Option 3	Area in gentle decay, minimal information, no heritage tax, no commercialisation.
Option 4	Area in gentle decay, good signage and other information, a $10 per year heritage tax, no commercialisation.

It is clear that the sample group in Figure 6.4 displays a strong preference for option 1, in which the area is well-maintained, with good information, minimal commercialisation and preservation paid for by the taxpayer. However, this is not to say that the taxpayer in general would be of the same view.

Figure 6.4 Popularity of Funding Options



Nor is this a test of the option in which the area is allowed to go into gentle decay, because none of the places surveyed were of this type. All of the surveyed towns have well-preserved heritage assets and good visitor centres with free information. The survey respondents would have most likely been people who were attracted to that type of place, rather than to a decaying place, or to a highly commercial place.

6.4 Visitor Expenditure and Economic Impact

Mean expenditure per person is shown in Table 6.11. The differences in the overall or total means are partly due to the differences in the proportions of day-trippers at each location, since day-trippers do not spend on accommodation. Hence Charters Towers and Maldon, both of which have a high proportion of day-trippers, have a lower overall average spend. The economic impact of cultural heritage tourism on Charters Towers and Maldon could be increased if some day-trippers could be encouraged to spend one overnight stay.

Table 6.11 Mean Expenditure per Person

Expenditure	Maldon ($)	Burra ($)	Charters Towers ($)
Day-trippers	48.17	36.33	61.37
Package tourists	148.30	253.51	188.48
Overnight stayers	194.30	175.81	232.44
TOTAL	99.40	109.45	87.77

Further insights into the expenditure behaviour of visitors are given in Table 6.12, which shows the allocation of aggregate expenditure across categories. Bear in mind that these figures are a function of the distribution of visitors across the three categories of 'Day-trippers', 'Package tourists' and 'Overnight stayers'; the real expenditure behaviour of visitors in each place; and the costs of goods and services in each place.

Table 6.12 Mean Expenditure on Each Category

Category	Maldon ($)	Burra ($)	Charters Towers ($)
Accommodation	20.76	29.21	8.78
Meals and beverages	28.56	28.75	22.20
Transport	10.64	20.15	26.19
Site entry	4.36	6.66	5.11
Other entertainment	0.76	2.64	2.33
Shopping	32.76	21.27	21.66
Other	1.56	0.77	1.51
TOTAL	102.06	109.45	87.77

The high expenditure on transport in Charters Towers stands out as an interesting feature of the data in Table 6.12. In all three places there is a significant proportion of expenditure on shopping, illustrating the importance of tourism to the retail sector in general.

The aggregate economic impact of tourism in each of the three locations on each region was estimated on an annual basis using the most recent visitation figures for a full year. The economic impact depends upon the mean expenditure per visitor, the total number of visitors in a year and the economic structure of each region.

The latter was accounted for in each case using regional input-output models and their associated multipliers for gross regional product (GRP) and employment. GRP is the regional equivalent of the national income measure gross domestic product. In each case, there is a high leakage of economic impact from the local region on account of the goods and services that are produced in other regions. The economic impacts shown in Table 6.13 refer to the wider economic regions in which each of the towns are located, not to the towns themselves.

Table 6.13 Economic Impact of Tourism

	Maldon	Burra	Charters Towers
Annual visitor numbers	41 868	40 913	69 917
Aggregate expenditure ($)	4 272 981	4 477 850	6 136 726
Gross regional product (GRP) impact ($)	3 820 880	4 810 995	6 127 729
Employment impact (jobs)	310	333	121

The available economic models are not capable of telling us what the economic impact of tourism is on the host towns themselves. The above impacts refer to quite large geographical regions, which are defined by the Australian Bureau of Statistics as Statistical Divisions.

With its larger aggregate number of visitors, Charters Towers has the highest total expenditure, even though expenditure per person is low in Charters Towers due to the large proportion of day-trippers. Clearly the tourism strategy for Charters Towers is to convert the day-tripper market into overnight stayers.

In all regions except Burra, the leakage of activity caused by goods and services supplied by other regions means that the impact on regional incomes (GRP) is less than the visitor expenditure. In other words the tourism economic multiplier is effectively less than one. This is a common outcome, even at the State level and sometimes at the national level.

Nevertheless, the $4 million to $6 million or so of economic impact from tourism to the three towns is clearly significant in the context of regional economic development. In each case the impact is worth about 0.05 per cent of the total economic activity of the region. More significantly perhaps is the potential for this flow of money to provide a source of funds to pay for the preservation of the heritage assets. The challenge is for local tourism and National Trust managers to cooperatively find ways of tapping into this revenue source.[19]

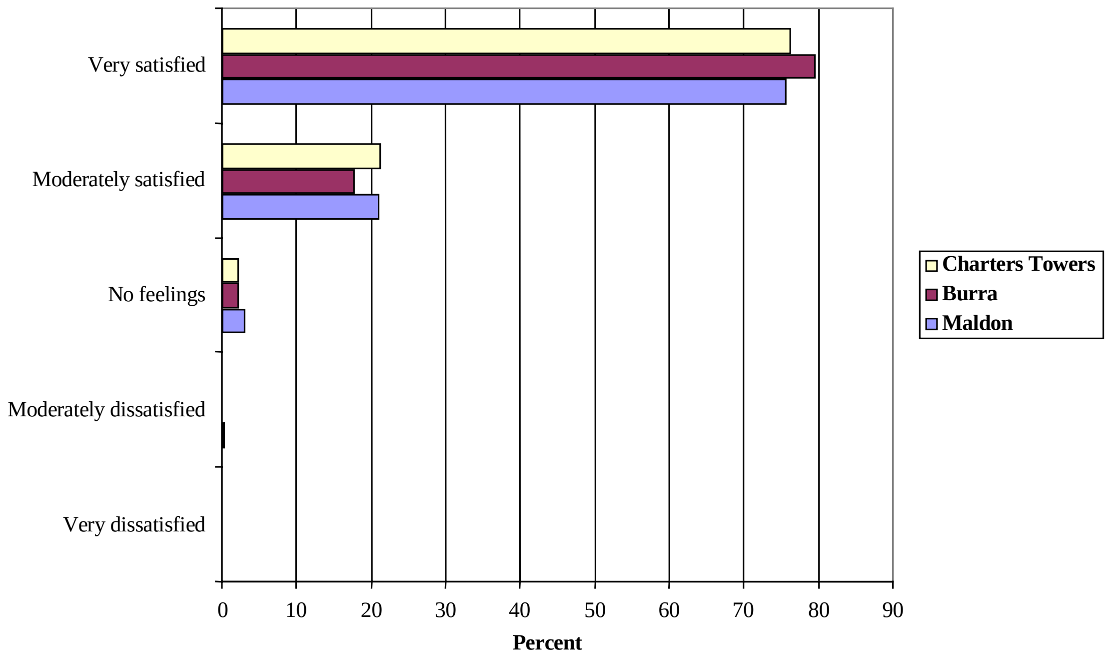
6.5 Visitor Satisfaction

All three destinations were accorded very high ratings in the survey in terms of overall visitor satisfaction. This is shown in Figure 6.5. Clearly visitors to each of the study destinations are going home contented with their stay, and as such should be valuable ambassadors for the towns.

More detail is available on aspects of visitor satisfaction by comparing the survey responses to various attributes. This is shown in Table 6.14, where satisfaction is ranked on a five-point scale with a score of 1 indicating very poor, a score of 5 indicating very good, and a score of 3 indicating average.

[19] The Burra Passport has been used in Burra for many years as a way of both giving valued information to visitors and of earning revenue for the National Trust. It is sold at the Burra Visitor Centre for $10 per person and provides visitors with a key to various heritage attractions as well as interpretive information.

Figure 6.5 Overall Satisfaction Rating



The worst rated aspect is signage within Charters Towers with a score of 3.57, which is just above average. This is not a poor enough rating to be of major concern, but it tends to be noticeable amongst all of the highly rated aspects of Charters Towers.

Table 6.14 Visitor Satisfaction Ratings

	Score		
	Maldon	Burra	Charters Towers
Maintenance of the attractions	4.2	4.3	4.4
Signage within the area	3.9	4.3	3.6
Signposting to the area	4.1	4.3	3.9
Access to places of interest	4.3	4.4	4.2
Authenticity of places of interest	4.4	4.5	4.5
Historical information available	4.2	4.5	4.4
Interest value in places accessible	4.4	4.6	4.4
Parking availability	4.4	4.7	4.2

While the measurement of visitor satisfaction is a developing area in tourism research, it does seem from Table 6.14 that the three study towns have little to worry about on the attributes selected. A fuller study of this issue would need to use focus groups to develop a more comprehensive list of attributes, and then use a survey instrument specifically designed for the measurement of satisfaction.

CHAPTER 7 THE VALUE OF A NATIONAL LIST

7.1 Introduction

In addition to benchmarking the value of tourism to places of cultural heritage significance, it was an objective of this study to explore the impact on such value of the inclusion of a heritage place on a national list. Our search of the international literature using electronic databases and key words has not revealed any studies which dealt with the impact on a location of its placement on a national list.

A priori it might be expected that such listing would increase the number of tourists to a listed location. This is because the award of status associated with listing would be a marketing advantage. In addition, the listing process would draw attention to the location, and the final granting of 'List' status would be a badge of authenticity and significance which would be expected to appeal to visitors.

The Australian experiences with World Heritage listing of south-west Tasmania and the Daintree rainforest in Queensland have shown how saturation media coverage of high-profile environmental proponents can serve to greatly raise awareness and increase tourism visitation. Not all listings can be assured of such coverage in the media, and it should not be assumed that listing bestows greater awareness of a location in every case.

After an exhaustive search of all available published material, it was found that there is a substantial research gap that needs to be filled in this area. The search did however uncover numerous references to the belief that heritage listing does have an impact on visitor numbers. The initial desire was to find research concerning cultural heritage sites and national registers; however, exhaustive attempts proved unfruitful. The majority of relevant information found concerns World Heritage Convention listing and natural heritage sites. It is assumed that any impacts of World Heritage listing would be exaggerated examples of those to be expected at the national level. It is also thought that the difference between cultural heritage vales and natural heritage values is minimal due to the close ties to the land that the people of Australia experience. The following presents a summary of relevant material found.

Shackley (1998:200) comments that 'It is frequently assumed that any site awarded World Heritage status will immediately receive a marked increase in visitors'. She goes on to mention that this is not necessarily the case, and that there are many factors that influence visitor numbers, including access and marketing of the site. It would seem that perhaps this view misses the point, as marketing and access are obviously going to have direct effects on visitor numbers, and there will always be exceptional cases. Further evidence of the belief that listing may affect visitor numbers is found in 'Australia and the World Heritage Convention' (DASETT, 1989:11), where it is stated that:

> Any site that is added to the World Heritage List in the future might also be expected to benefit from an increased level of tourism as a result of the international recognition of the area. This in turn would directly benefit the local economy.

This belief has been used in recent years by the Surfcoast Shire Council (Victoria) to lobby for the inclusion of the Great Ocean Road on the World Heritage List, claiming that ‘listing would protect the environmentally sensitive coast and increase tourism’ (Mitchell, 1996). There does, however, seem to be a lack of evidence to back up these claims. The issue of whether heritage listing impacts on visitor numbers can only be resolved through specific research into this topic. University of Otago Masters student Rachel Piggins has completed a dissertation on this subject; however, it is unavailable at this time.

Shackley (1998) also suggests that World Heritage designation at the site in Bukhara was essential to the provision of conservation funding and implementation of strategic visitor management. Similar impacts are reported for Biertan, where new sponsors and new roads resulting from 1993 World Heritage designation saw the revival of restoration that had been left dormant since the 1970s. Impacts such as these may add credit to the claim that heritage designation has the potential to increase visitor numbers as well as provide access to otherwise inaccessible conservation funds. It is through strategic visitor management (including adequate interpretation efforts) and access to conservation funding that the potential economic benefits of heritage listing may be realised. If properly administered, the extra revenue generated from both increased tourism and conservation funding would be used to minimise the impacts of tourism on the heritage site. However, generation of increased tourism numbers (and, potentially, revenue) is not to be seen as an absolute reason for applications towards heritage listing. It is essential that administrators of heritage sites ensure that the site in question adequately addresses the criteria applicable, and that the potential increase in visitors can be managed without the degradation of the very heritage values that listing aims to protect.

Feilden (1993:102) recognises that ‘Techniques of visitor management can ensure that the sheer number of visitors to a site does not detract from general enjoyment of the site’, and that they can ‘…also reduce maintenance costs and increase income’. The symbiotic relationship that needs to be achieved between tourism and conservation relies on the belief that enhancing people’s understanding and enjoyment of heritage areas through tourism will evoke continued support for the conservation and sustainable tourism management of these areas (Kelleher and Dinesen 1993, 1994 in Dinesen and Oliver 1997).

Further references are made to perceived impacts by Chester (1996), who sites the nomination of the Wet Tropics World Heritage Area in Northern Queensland. There was much dispute over the implications of heritage listing for this site, as it was the source of a lucrative logging industry for the local economy. Tourism was touted to be the industry that would replace lost logging revenue and employ those put out of work. It is also claimed that tourism’s economic contribution in the Wet Tropics in 1996 was likely to exceed that of the logging industry, which was consequently shut down after listing in 1988. Chester also mentions that the presentation of World Heritage values may act as promotion, subsequently attracting more tourists.

A report titled ‘Impact Assessment: World Heritage Listing’ (Lynch-Blosse, 1991) focuses mainly on the logging industry, and therefore contains little information on the tourism impacts. It does, however, present accommodation takings and guest nights for the various Local Government Areas (LGAs) in the Wet Tropics World Heritage Area from 1987 to 1990. As mentioned earlier, the Wet Tropics area was listed in 1988. Most of the LGAs showed minor fluctuations, but the Douglas LGA showed a substantial change, increasing from 17 191 visitor nights and $413 000 in accommodation takings in 1987, to 37 175 visitor nights and $2.641 million in accommodation takings in 1988. These figures continued to grow to 58 744 visitor nights and $4.069 million in accommodation takings in 1990. This is quite a substantial increase over a four-year period, however no connection is made by the author to the Wet Tropics listing.

Driml also makes reference to the tourism value of protected areas, suggesting that ‘The conservation status of an area is often publicised by commercial tour operators in their advertising material, signifying their belief in the drawing power of such status’. And also that ‘Management agencies and State and Commonwealth Government Tourist Commissions promote protected areas as tourist attractions’ (1994:4). This is backed up by Feilden, who suggests that the very nature of cultural heritage sites as economic and cultural assets ensures that they will be ‘…publicised, advertised and promoted by those whose daily duty or interest this is’ (1993:104).

It is clear that there is a general belief among the research community that heritage listing has the definite potential to increase visitor numbers to a heritage site. The absolute lack of published research into this effect is a potential stumbling block for those wishing to make claims for the positive benefits of listing on a national register or similar database. It is suggested that specific research be commissioned to address this research gap.

Our surveys of selected heritage mining towns have found that authenticity and information were important attributes of the heritage experience for visitors. Placing a location on a national list would ensure that both were features of the location.

Despite the Australian experiences, Shackley (1998) warns that the impact of listing on tourism numbers is as much a function of marketing and access as it is of the actual listing. She quotes examples from the World Heritage List where, despite great prominence, the locations are subject to remoteness or poor transport services, or both. In other examples (Easter Island) the location had great prominence before listing and so being on the List added very little to the sense of importance in the minds of potential visitors. People *expected* it to be on the list.

Given the lack of published research on the effects of listing, we have adopted an approach to measuring the value of heritage locations in tourism by reviewing what is known on the size of the market for cultural heritage tourism.

International and domestic visitation to heritage and historical sites has been a primary motivator for travellers and tourists since antiquity. Culture, heritage and the arts have contributed to the appeal of destinations and cultural tourists are, at the turn of the century, unquestionably the sought-after major market segment for destination marketers (Hall 1992, Wells 2000). Visits to shrines, historical monuments and buildings have been documented over the last two thousand years. The most significant phenomenon for travelling to cultural heritage sites was the 'Grand Tour' in the sixteenth and seventeenth centuries when European men and women travelled to Southern Europe, notably Greece and Rome, specifically for the purpose of learning and education. In the latter part of the twentieth century, cultural tourism has been 'rediscovered'. Cultural tourism is a broad definition and relates both to demand and supply. On the demand side there is the assumption that the market is broadly generic when the term encompasses several segments, with arts and heritage being but two of these segments. Although cultural tourism is a major market segment within the leisure/holiday segment, it encompasses various subsets such as arts, heritage and literary tourism, which indicate a more specific purpose attributed to the cultural visitor. From a supply-side perspective, Hughes (1996) has argued for a more supply-based definition. In effect, this means that the nature of supply requires a more conceptual definition including high and popular culture, static attractions and active events, and performances (Wells, 2000).

The value of cultural heritage tourism is its potential for sustainability and, from a marketing perspective, its potential to differentiate destinations:

> It works with the community to identify the special character of a destination, its sense of place and sense of continuity. Cultural tourism ensures that the new developments are so consistent with the character of the place that they become part of it (Tourism South Australia, 1992).

Dewailly (1998) notes the growth in heritage tourism in rural and regional areas in Europe and the impetus to conservation, protection of both natural and human elements, stimulated by heritage tourism:

> Perceived authenticity on the part of the visitor rather than simply conservation is therefore necessary to transform history in to heritage and complete the process of commodification (p30). Heritage tourism has the potential to revitalise and regenerate declining rural and regional fortunes; firstly through conservation and visitation. Heritage sites including the natural and built environment are resources that remain latent until activated by a use for it but in this case resources are in a real sense created as much as activated (Ashworth, 1992).

Rural heritage in Europe is now an object of major attention in Europe, as much for its socio-cultural as economic significance.

Studies on the positive and negative cultural impacts of tourism are well known in tourism literature. Increased visits to historic sites have the potential to increase conservation and protection of significant heritage sites while, on the other hand, overcrowding and the lack of financial and human resources leads to pressure from visitation and eventual damage. Many historically significant buildings and localities are unable to withstand large influxes of visitors. Nevertheless, tourism is actively encouraged for the purpose of assisting the preservation of historic buildings. For this reason, government and non-government authorities seek to raise funding both privately and publicly to restore heritage. The National Trust has played a major role in raising finance and lobbying governments for this purpose. The National Trust in England and Wales can only maintain its priceless heritage of houses and land through the revenue it raises from visitor entry fees. Tourism has the potential to both conserve the built environment and act as a destructive force – delicate balance is required (Craig-Smith and French 1994)

Inbound or international tourism is a major growth industry and domestic tourists are being encouraged to travel in Australia rather than to travel abroad. According to the Bureau of Tourism Research, 'approximately one in three inbound visitors to heritage sites planned their visits'. In 2000 the number of visitors forecast to grow by 7.3 per cent. By 2008 around 8.4 million overseas tourists are forecast to come to Australia (Forecast 1999). Previous research by the Australia Council (1991, 1994) indicated that the longer the visitors stay, the more likely they will visit heritage sites and regional Australia.

The economic value of national listings of historic sites has not been documented. The major indication of economic benefits is normally measured by visitation, expenditure and employment generated by visitors to cultural heritage sites. Some preliminary studies (National Trust 1999, Urban Consulting Group 1995) highlight the historic and economic benefits from heritage listing.

Major themes for further discussion and expansion include definitions of cultural heritage tourism; the role of the Register of the National State, National Trust and World Heritage listings and an overview of visitor numbers attending historic sites which may or may not be listed. In conclusion a comparative study of United Kingdom visitation to National Trust sites compared with the United States and Australia is provided to illustrate importance of the economic benefits of tourism to sites with National Heritage listings.

7.2 Definition of Cultural Heritage Tourism

7.2.1 Supply-side issues

Conceptual definitions of cultural, historic, heritage and arts tourism are often interlinked but require clarification. From a tourism perspective, the concept is best understood in terms of demand and supply. However, a broadening and clarification of supply-side tourism[20] provides an improved base for understanding the motivation of cultural visitors. Currently cultural tourism is too broad a concept to be useful for statistical collection (Bureau of Tourism Research) and there have been a number of attempts to define cultural tourism in terms of visitor motivation. For example the World Trade Organisation defines the concept in terms of:

[20] In tourism, supply-side motivations are the things that the industry is motivated to supply, in response to customer demand. The latter is motivated by psychological, physical, social and spiritual needs.

> movements of persons for essential cultural motivations, such as study tours, performing arts, cultural tours, travel to festivals and other events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages.

As Hughes states, the concept requires redefinition to include a much more specific understanding of the supply side and the ultimate intent of the visitor. Supply-side cultural tourism typologies are useful in highlighting how heritage sites are placed in any cultural tourism definition or paradigm (Hall 1995, Ekos Research Associates 1988, Wells 2000). Visitors to heritage sites are special interest visitors, providing low volume but high yield, and on a continuum are more likely to be interested in high culture. In terms of visiting heritage sites, cultural visitors to heritage sites will be seeking more than just a visit to a historic building.

A supply-side definition of visitation to cultural heritage sites is generally accepted to include visitors to museums, historic buildings and monuments, archaeological sites, heritage reconstruction parks or towns, and theme parks (Brokensha and Guldberg 1989). The Bureau of Tourism Research mentions that in 1993 there were 1765 museums operating in Australia, with New South Wales and Victoria having the greatest numbers of museums while Tasmania had the greatest number of museums per head of population. (BTR 1999:14). At 30 June 1997 there were 9124 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 (BTR 1999:15)

Heritage activities were amongst the major activities undertaken by international visitors to Australia in 1998.

Table 7.1 Cultural Activities Undertaken by Inbound Visitors

Type of cultural activity	Number of cultural visitors	Percentage
Visiting museums or art galleries	371 900	31
Visiting historic or heritage building sites and 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	105 800	9
Attending festivals or fairs	50 000	2
TOTAL	1 293 200	100

Source: BTR Cultural Motivations Survey (1998).

7.2.2 *Demand or market motivation*

Heritage sites provide tangible links between past, present and future. Heritage visitors are therefore motivated to visit sites of tangible natural, cultural and built environments of an area, but have expectations of experiencing heritage values such as authenticity, nostalgia, uniqueness, discovery, knowledge and links with the past.

> All cultural tourism market segments are seeking, authentic, often interactive, experiences that can be found at cultural destinations and attractions. History and heritage attractions are often considered necessary components for enjoyment at a destination (Geelong Otway Tourism 1995).

According to the Bureau of Tourism Research, international cultural tourists are motivated primarily to experience something Australian and as part of a package tour. The survey data (Bureau of Tourism Research 1998) allows for some cross-analysis, particularly in extrapolating data for heritage sites: museums or art galleries and historic or heritage buildings, sites and monuments. Table 7.2 shows that visitors to museums and art galleries wish to experience something Australian whereas those visiting historic or heritage buildings, sites and monuments were motivated because they were on a package tour; however, experiencing something Australian was their secondary motivation. However, this analysis shows that heritage sites and their uniqueness as representing Australian cultural is a primary motivator.

Table 7.2 Comparison of Major Motivations Between Cultural Tourists and Heritage Visitors

Cultural tourist motivations		Museums and art galleries		Historic or heritage building sites and monuments	
Experience something Australian	28%	Experience something Australian	32%	Part of a package tour	32%
Part of a package tour	25%	Specifically wanted to visit	21%	Experience something Australian	23%
Specifically wanted to visit	25%	Part of a package tour	20%	Experience something new	15%
Experience something new	14%	An educational experience	14%	Specifically wanted to visit	12%

Source: Bureau of Tourism Research. (1998) 'Cultural Tourism in Australia' (adapted).

From a domestic tourism perspective, very few major studies identifying the components of cultural tourism motivation have been undertaken in the last 10 years. However, the first national survey to examine the participation in cultural activities by domestic tourists (Australian travellers in their own country), which was sponsored by the Arts Council, has provided some benchmarks into the nature of cultural tourism. A number of observations were made from the data (BTR Domestic Tourism Monitor 1990–1991). The data was prepared in frequency order so that heritage may also be linked to other categories such as museums, national parks or art galleries.

- 17 per cent of cultural visitors visited heritage sites
- Tasmanians and South Australians wer more likely to visit heritage sites
- The 40–54 years age group were most likely to visit heritage attractions
- Visitors with university-level education were more likely to visit heritage sites
- European-born domestic travellers showed the strongest interest in heritage
- Visits to heritage sites were most likely from a cross-section of the population
- Visitors to heritage sites were more likely to be on holiday than visiting friends and relations or visiting for business.

(See also Brokensha and Guldberg 1992)

7.3 Australian Heritage Commission, National Trust and World Heritage Listings

There are three methods by which heritage sites derive international, national and local significance as a result of listing or recommendation of an organisation or committee. The World Heritage Committee manages the Convention Concerning the Protection of the World Cultural and Natural Heritage, one of the three UNESCO Conventions related to cultural heritage. Nomination to the World Heritage List requires the site to be of outstanding universal value. Criteria for category (a) monuments, groups of buildings and sites are that they must in summary:

1. represent a masterpiece of human creative genius;
2. meet the test of authenticity in design, workmanship or setting; and
3. have adequate legal protection and/or contractual and/or traditional protection and management mechanisms to ensure the conservation of the nominated cultural property or cultural landscapes.

(Adapted from Feilden and Jokilehto 1998:6–7).

In Australia, only those sites of physical and cultural landscapes are World Heritage listed, while urban and built environments have not been listed.

The Australian Heritage Commission is a statutory authority established by the Commonwealth Government in 1976 to assist in preservation of the National Estate. The National Estate is defined in the enabling legislation as:

> those places being components of the natural environment of Australia, or the cultural environment which have special values for the future as well as for the present community (Annual Report, 1991–1992).

The Register of the National Estate is an inventory of all parts of Australia’s natural, historic, Aboriginal and Torres Strait Islander heritage. To qualify for protection on the Estate, a detailed process of assessment, evaluation, public consideration and hearings by the Australian Heritage Commission is required under the *Australian Heritage Commission Act 1975* and its amendments. Over 6000 heritage sites have been registered on the Register of the National Estate.

The National Trust is a separate body focused on heritage protection. It is a not-for-profit association and plays an integral support role with the Australian Heritage Commission in assisting with nomination sites of cultural heritage significance to the National Register. Its role is primarily to raise awareness and lobby government on a range of cultural heritage projects. The National Trust is represented in every State and Territory. The New South Wales National Trust, for example, was formed by citizens who were concerned about the destruction of buildings and lands which they valued as their heritage. Since 1945, the New South Wales National Trust has shown leadership in the identification, promotion and management of places of heritage significance. The New South Wales National Trust and its State counterparts have been incorporated into Acts of State Parliaments but remain independent non-government, member-based organisations. The National Trust is responsible for fund-raising and management of those sites identified and registered by the National Trust in States and Territories. There are currently 300 National Trust-operated properties (National Trust of Australia).

7.4 Tourism-induced Economic Benefits

According to the Urban Consulting Group study (1995), a number of wider economic benefits can result from heritage listing. A major economic benefit identified by the group was increasing tourism. Increased tourism and its associated effects (employment and income multiplier) have been identified in the United Kingdom, United States and Australia as major contributors to the economy. The report noted that United States studies showed that a high proportion of foreign tourists cite historic significance as an important factor in choosing destinations. The estimated market for cultural tourism is estimated at around 20 million persons with an estimated $17.8 billion dollars of tourism expenditure (1990 figures) directly related to tourism. The report cites a National Institute of Economic Research and Industry (NEIR) as estimating a sum of $200 million being generated from international and interstate tourists by holding a performance of Phantom of the Opera in the restored Princess Theatre:

> The special heritage qualities of the theatre provided the potential to add a further dimension to, and extend, the heritage experience of visitors with linkages to other historic building such as packages contributing combining accommodation at the Windsor Hotel (Urban Consulting Group 1995).

United Kingdom figures on the nature of visitation to National Trust properties (English heritage) show that numbers are increasing. For example, visitor figures to heritage listed properties revealed a general increase in the total number of visitors from 1996–1997 to 1998–1999.

Table 7.3 English Heritage Visitor Figures to the Top Ten Most Visited Sites

Location	1996–1997	1998–1999
1. Stonehenge, Wiltshire	753 242	832 540
2. Dover Castle, Kent	324 033	329 478
3. Osborne House, Isle of Wight	198 712	311 119
4. Tintagel Castle, Cornwall	195 945	194 069
5. Kenwood, London	145 903	150 003
6. Clifford's Tower, York	148 983	139 595
7. Whitby Abbey, North Yorkshire	121 015	121 057
8. Audley End House, Essex	95 613	118 111
9. Housestead's Roman Fort, Northumberland	126 161	113 140
10. Appuldurcombe House	n/a	n/a

Source: English Heritage, Education Service Facts Sheet.

From an Australian perspective, the top cultural heritage attractions visited in 1996 were as follows:

- Sydney Opera House, New South Wales 1 705 517
- The Rocks, New South Wales 1 285 005
- Royal Botanical Gardens, Victoria 273 529
- Queen Victoria Markets, Victoria 449 727

Of even more significance are the number of international visitor groups visiting cultural and heritage sites in Australia. Although these percentages may be dated, the attractions themselves are significant because of the image that is associated with each State/Territory and region.

Table 7.4 Principal International Visitor Profile Groups Visiting Cultural and Heritage Sites in Australia, by Country of Origin

State	Attraction	Country of origin
New South Wales	Sydney Opera House	Japan (93%) Scandinavia (86%)
New South Wales	Museum/Art Gallery of NSW	Scandinavia (34%) Germany (28%)
Victoria	Museum of Victoria	Malaysia (30%) UK/Ireland (27%)
Victoria	Captain Cook's Garden Cottage	Japan (70%) Singapore (41%)
Victoria	Sovereign Hill at Ballarat	UK/Ireland (28%) Malaysia (23%)
South Australia	State Museum/Constitution Museum Art Gallery	UK/Ireland (46%) Hong Kong (42%)
Western Australia	Pioneer World Elizabethan Village	Singapore (24%) Hong Kong (22%)
Tasmania	Port Arthur	Scandinavia (79%) France (76%)
Tasmania	Richmond Historic Township	Japan (95%) Malaysia (58%)
Australian Capital Territory	National Gallery of Australia	Scandinavia (48%) Other countries (58%)
Australian Capital Territory	Australian War Memorial	Japan (86%) Hong Kong (82%)
Northern Territory	Ayers Rock	Japan (97%) Switzerland (88%)
Northern Territory	Kakadu National Park	Italy (53%) Switzerland/Germany (46%)

Source: International Visitors Survey 1988, Bureau of Tourism Research.

Note: 1988 International Visitor Survey data has been reported, as more recent data has not looked at visitation to the same cultural attractions.

7.5 Conclusion

Cultural heritage is a primary pull factor for international and domestic tourism. Although increasing visitor numbers are significant from an economic perspective, the value of cultural heritage is that it has potential for sustainable tourism and provides economic benefits to rural and regional communities. From a marketing perspective, cultural heritage provides destinations with a unique appeal which differentiates regions and countries. The nature of visitors is changing. The new market is increasingly discerning and wishes to partake in experiential and authentic tourism with associated educational rewards (Read 1980). Cultural tourism's importance to the Australian tourism industry is great (Industry, Science and Tourism 1998). In 1995, 3.9 million Australians visited museums, while 3.1 million visited art galleries. Over one-quarter of all inbound tourists visited museums and art galleries in 1996. The growth in cultural and heritage tourism can be attributed to an increasing awareness of heritage, greater affluence, more leisure time, greater mobility, increased access to the arts and a reaction to the demands of modern society (Brokensha and Guldberg 1992).

CHAPTER 8 SUMMARY AND CONCLUSIONS

This study has provided some benchmark data on the value of tourism at regional locations possessing heritage attractions. The locations were all part of the history of Australia's mining development of the 1800s, and in each case the legacy of the mining boom has been assets, mostly buildings and other historical constructions of interest to visitors.

Visitors to such locations have shown clear preferences for well-maintained attractions with good amenities and good information. The most valuable information to them is in the form of brief summaries of the offerings at each location.

Most visitors are over 40 years of age and reside within the same State as the attraction being visited. There is a slight but significant predominance of females over males in the visitors. The most popular form of accommodation was the caravan park. The most popular reason for the trip was to see the heritage sites in Maldon and Burra. But in Charters Towers it was 'holidays', with seeing the heritage sites a close second. Visitors were more likely to go for a country drive or to a restaurant than on an overseas trip or to a concert.

Survey results suggest that a heritage design burger bar (for instance) would not be popular, as there was an aversion to too much commercialisation. There was a clearly expressed interest in authenticity, but without guides or interaction – people wanted to be able to 'do their own thing'. Seeing things was more important than learning about them, and there was more interest in tangible things like buildings than in cerebral things such as the nature of society in 1850 Australia. This suggests that there is a higher demand for heritage significance than for culture, although a more sophisticated study would be needed before these could be separated.

In each of our study towns, the visitors injected millions of dollars into the local economies, an impact more keenly felt and appreciated in the towns than in their broader region. The study has been able to identify strategies in each town for increasing the economic impact. For Maldon and Charters Towers, this was to convert day-trippers into overnight stayers; for Burra to raise the daily visitor spend.

While brief summaries were the most highly sought information type, there was a significantly strong demand for national listing of places of cultural heritage significance, with between 53 per cent (Burra) and 74 per cent (Maldon) voting for this as a form of information. While there is a dearth of published research on the question of the impacts of national listing, it appears from our surveys that this would be a highly desirable form of information for people when planning trips to locations of cultural heritage significance. Further research is needed before this effect may be quantified.

APPENDIX A COST-BENEFIT ANALYSIS AND ECONOMIC IMPACT

This study features the economic impact of tourism on the chosen towns. As such, it differs from a cost-benefit evaluation of any public or private expenditure that might be proposed to enhance such tourism. However, in a regional tourism context the two are not very different.

Cost-benefit analysis (CBA) of public expenditure is founded in the principles of welfare economics. It concentrates on principles of opportunity cost and consumer and producer surplus measures, with a particular emphasis on consumer surplus. In essence, the benefits of a project outweigh the costs, if the willingness to pay by consumers outweighs the value of the resources used in the process (where value is represented by the opportunity cost involved).

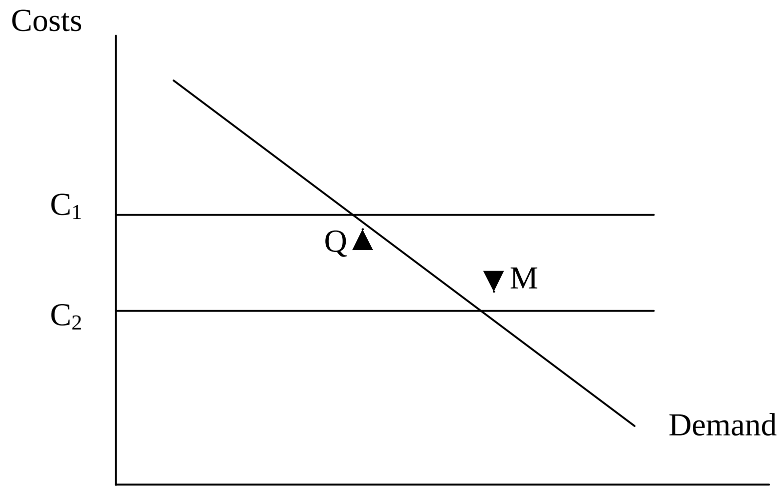
Most texts on CBA make a distinction in the decision-making processes between private and public investment. They start from the premise that there are well-defined procedures to be followed by private firms when evaluating their investment decisions. Potential projects are ranked according to some criterion such as rate of return. The projects undertaken are those for which the rate of return exceeds the cost of funds.

In the public sector, projects do not have a concept which is equivalent to rate of return, since the 'return' accrues to a wide section of the community and is not captured by the investor (i.e. the Government). According to Dasgupta and Pearce (1978, p.14), cost-benefit analysis was developed in order 'to extend the idea of efficiency to public expenditures'. Public projects should be undertaken if their benefits exceed their costs. Where a number of projects are being considered and public funds are scarce, the alternatives should be ranked in order of their ratio of benefits to cost. Provided these ratios exceed one, projects should be proceeded with, starting at the top of the list and working down, until the scarce funds are used up.

In practice, it has been the measurement of benefits rather than costs which has caused most disagreement. Mishan (1988) proposes that benefit be measured by the increase in consumer surplus. An example (illustrated in Figure A.1) is the situation where a government is considering the construction of a new highway. It has a number of options, each of which will have the effect of reducing travel costs. Suppose that option A would reduce travel costs from C_1 to C_2 in Figure A.1 (with an implicit assumption of fixed marginal cost of travel per kilometre). The increase in consumer surplus would be the area QMC_2C_1. If the money value of this area exceeds the cost of option A for the highway, then option A has a benefit-cost ratio in excess of one.

If other options exist and they all have benefit-cost ratios in excess of one, the different options should be ranked in order of benefit-cost ratio and the option with the highest ratio should be the one chosen. This ensures the highest possible social return on public investment. Dasgupta and Pearce (1978, pp. 201–234) give as their example the options available for siting London's third airport.

Figure A.1 Effects of Public Expenditure on Cost Reduction



The CBA texts such as Mishan (1988) typically advocate the use of this technique when comparing alternative projects within a broadly similar field. Examples include the choice of site for the third London airport and the routing of a motorway where different routes are possible. Typically, they do not discuss the technique's use in comparing different uses of public funds, such as deciding on the relative merits of a proposal to build a motorway and a proposal to build a hospital. This is partly because the winners and losers are very different groups in these two cases. In a welfare sense, it cannot be assumed that a dollar gain to a road user is equal to a dollar gain to a hospital patient. For this reason, the method of choosing between such competing claims on public funds is left to the political process.

In addition, it should be noted that the typical situation where the use of CBA is advocated is one where the investment is expected to reduce costs rather than to increase demand. Public spending on tourism promotion – via creating a heritage trail, for example – has the effect of stimulating demand for transport, accommodation, shopping, entertainment etc. Unlike the example of a motorway, there is no cost reduction effect.

We turn now to an analysis of CBA in this situation. It must be noted that in many cases the orientation of tourism activity is not around local consumers but around attracting tourists (and, of course, their spending) from outside the region. In this case, much of the benefit comes from the impact on production levels. Therefore, producer surplus is the more appropriate focus.

Producer surplus represents the return to producers for units of production up to and including the last unit above and beyond the cost of resources involved in the production. It generally assumes that resources used are used at their opportunity cost.

However, it is acknowledged in the texts (e.g. Mishan 1998) that there are times when the use of resources has a value greater than their current use. This generally occurs when either capital or labour are unutilised or underutilised, and presumes some degree of market failure. This is certainly consistent with the socio-political context. The creation of jobs is seen as a good thing and the closure of a factory and loss of jobs as a bad thing. In times of unemployment, that many regions experience underutilised factors of production is unequivocal.

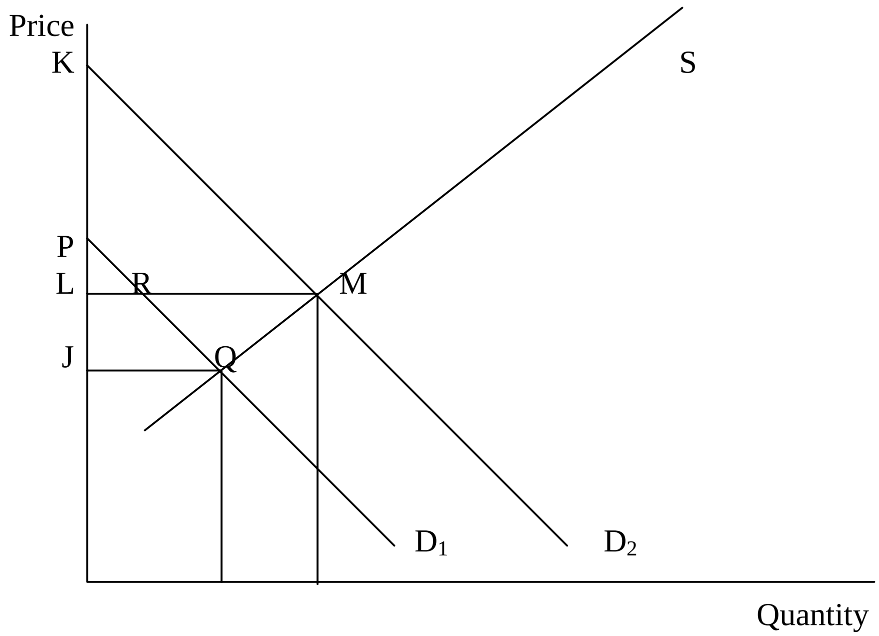
Public spending on tourism promotion has an economic impact via the expenditure of visitors who would not have come but for the promotion. Such public spending can be justified if the benefits to society are greater than the costs but, since the beneficiaries are largely private firms providing tourism services, the question of why these firms do not fund the promotion themselves arises. The answer lies in market failure.

Because individual firms are unable to capture all the benefits of funding the promotion, they are unable or unwilling to do so individually. They might do so collectively, i.e. by forming a cooperative group to jointly fund the special event. However, individual firms can maximise their profits by opting out of the cooperative, i.e. by allowing others to fund the event while enjoying the extra business that the event generates. This is called the 'free rider problem'.

Thus without government funding, tourism promotion would generally be under-provided, if it were provided at all. We can apply CBA principles to the situation by considering Figure A.2. Government expenditure on tourism promotion increases the demand for tourism services in Figure A.2 from D_1 to D_2. Consumers lose surplus equal to QRLJ and gain PRMK. If both supply and demand are relatively elastic, the gain exceeds the loss. Producers' surplus increases by QMLJ.

Under CBA, the public spending is worth undertaking if this gain exceeds the cost of tourism promotion. However, since the consumers of tourism services are non-residents, consumers' surplus is an inappropriate measure of social gain from the point of view of the host economy. In terms of Figure A.2, this corresponds with the increase in producers' surplus QMLJ, plus the increase in payments to factors of production LMXY. If the owners of the means of production are residents, this area represents extra income which the residents of the region receive as a result of hosting the tourists.

Figure A.2 Effects of Demand Promotion



This demonstrates the difference between CBA and economic impact as means of measuring the benefit from promoting tourism. The conclusion is that where resources are underutilised (particularly the primary factors of production), economic impact analysis replaces consumer surplus – and then producer surplus – as the measure of benefit arising from the activity. This is, of course, the same as placing an emphasis on gross domestic product as a measure of economic well-being.

APPENDIX B STANDARD ERRORS AS PERCENTAGE OF SAMPLE MEANS

MALDON				
	Sample size	Mean	Std deviation	Std error (%)
Package tourists				
Total cost of package	13	123.27	69.29	15.59
Nights covered by package	17	5.53	14.30	62.72
Nights in Maldon	16	1.56	1.03	16.51
Accommodation expenses	19	9.47	28.38	68.75
Meals expenses	19	28.63	39.96	32.02
Transport expenses	19	5.16	8.78	39.04
Entry fees expenses	19	4.53	7.34	37.17
Entertainment expenses	19	0.00	0.00	n/a
Shopping expenses	19	65.21	136.54	48.04
Other expenses	19	0.53	2.29	99.12
Day-trippers				
Meals expenses	476	13.68	14.09	4.72
Transport expenses	476	5.24	10.92	9.55
Entry fees expenses	476	3.31	7.06	9.78
Entertainment expenses	476	0.28	1.69	27.66
Shopping expenses	476	23.74	58.79	11.35
Other expenses	476	1.92	36.76	87.75
Overnight stayers				
Accommodation expenses	248	60.25	72.28	7.62
Meals expenses	248	56.48	72.64	8.17
Transport expenses	248	21.25	31.72	9.48
Entry fees expenses	248	6.38	10.98	10.93
Entertainment expenses	248	1.71	9.71	36.06
Shopping expenses	248	47.24	84.73	11.39
Other expenses	248	1.01	6.31	39.67
BURRA				
	Sample size	Mean	Std deviation	Std error (%)
Package tourists				
Total cost of package	24	185.83	227.60	25.00
Nights covered by package	24	1.63	1.79	22.42
Nights in Maldon	24	1.17	1.17	20.41
Accommodation expenses	25	40.40	76.72	37.98
Meals expenses	25	34.40	35.51	20.65
Transport expenses	25	9.80	15.03	30.67
Entry fees expenses	25	6.88	9.57	27.82
Entertainment expenses	25	0.64	2.29	71.56
Shopping expenses	25	27.84	73.88	53.07
Other expenses	25	0.16	0.80	100.00
Day-trippers				
Meals expenses	209	12.82	21.37	11.53
Transport expenses	209	11.22	20.86	12.86
Entry fees expenses	209	2.10	5.35	17.62
Entertainment expenses	209	0.19	1.69	61.53
Shopping expenses	209	9.68	26.15	18.69
Other expenses	209	0.32	3.12	67.44

BURRA (cont.)				
	Sample size	Mean	Std deviation	Std error (%)
Overnight stayers				
Accommodation expenses	176	56.25	99.95	13.39
Meals expenses	176	42.31	49.64	8.84
Transport expenses	176	29.08	39.89	10.34
Entry fees expenses	176	10.88	12.49	8.65
Entertainment expenses	176	5.26	22.34	32.01
Shopping expenses	176	30.78	66.11	16.19
Other expenses	176	1.25	5.20	31.36
CHARTERS TOWERS				
	Sample size	Mean	Std deviation	Std error (%)
Package tourists				
Total cost of package	12	2678.25	1551.35	16.72
Nights covered by package	19	53.84	83.27	35.48
Nights in Maldon	19	2.42	6.27	59.44
Accommodation expenses	23	23.57	48.74	43.12
Meals expenses	23	15.35	20.50	27.85
Transport expenses	23	6.35	11.44	37.57
Entry fees expenses	23	2.09	4.83	48.19
Entertainment expenses	23	1.22	3.23	55.21
Shopping expenses	23	19.52	21.10	33.22
Other expenses	23	0.00	0.00	na
Day-trippers				
Meals expenses	150	17.57	13.52	6.28
Transport expenses	150	21.47	22.95	8.73
Entry fees expenses	150	4.39	7.69	14.30
Entertainment expenses	150	0.55	3.02	44.83
Shopping expenses	150	16.57	29.95	14.76
Other expenses	150	0.82	5.63	56.06
Overnight stayers				
Accommodation expenses	256	56.35	83.97	9.31
Meals expenses	256	47.57	59.01	7.75
Transport expenses	256	52.57	192.46	22.88
Entry fees expenses	256	9.12	13.99	9.59
Entertainment expenses	256	12.13	28.71	14.79
Shopping expenses	256	49.33	55.35	7.01
Other expenses	256	5.37	27.40	31.89

APPENDIX C EXAMPLE OF SURVEY INSTRUMENT

CHARTERS TOWERS TOURISM STUDY

TO BE COMPLETED BEFORE EACH INTERVIEW

Date: ____________________ INTERVIEWER______________________
Time ____________________
No. of refusals prior to this interview __________________________________
Comments: ____

Good morning/afternoon, my name is _________________. We are part of a study by the University of Canberra looking at tourism to historic mining towns. Would you mind answering a few questions? It will take about ten minutes.

Are you a visitor? (**IF NO, THANK THEM AND MOVE ON)**

1. Including yourself, how many people came to Charters Towers in your group? **(INCLUDE IMMEDIATE COMPANIONS/FAMILY. IF ARRIVED ON BUS, NOT ALL ON BUS).**

2. How long was your visit to Charters Towers? **TICK ONE BOX ONLY (SHOWCARD 2)**

- ❑ Less than 1 hour
- ❑ 1 hour less than 2 hours
- ❑ 2 hours less than 4 hours
- ❑ 4 hours less than 6 hours
- ❑ 6 hours less than 8 hours
- ❑ 8 hours < 24 hours (<1 day)
- ❑ 24 hours < 36 hours (<1.5 days)
- ❑ 36 hours < 48 hours (<2 days)
- ❑ 48 hours or more (>2 days)

3. What places have you visited while in the Charters Towers region? **TICK ALL THAT ARE MENTIONED (SHOWCARD 3)**

- ❑ Venus Gold Battery
- ❑ Rotary Lookout
- ❑ Boer War Memorial Rotunda
- ❑ School of Mines
- ❑ Assay Mining Museum
- ❑ Pfieffer House
- ❑ Parks
- ❑ Sightseeing old homes
- ❑ Ay-Ot Lookout
- ❑ Old Court House
- ❑ Stock Exchange building
- ❑ Zara Clark Museum
- ❑ Historic Post Office
- ❑ World Theatre Building
- ❑ Antique shops
- ❑ Other...

4. How did you find out about Charters Towers and associated attractions? **TICK ALL THAT ARE MENTIONED (SHOWCARD 4)**

- ❑ From friends
- ❑ Radio program
- ❑ State tourist authority
- ❑ Travel guidebook
- ❑ TV program
- ❑ Magazine article
- ❑ Motoring association
- ❑ Previous knowledge
- ❑ Newspaper story
- ❑ Web/Internet
- ❑ Local tourist authority

5. Would you please rate the following aspects of your visit to Charters Towers **(SHOWCARD 5) (CIRCLE ONE NUMBER PER LINE)**

	Very Good	**Good**	**Average**	**Poor**	**Very Poor**	**Not Applicable**
Sign posting **to** the area	5	4	3	2	1	6
Historical information available	5	4	3	2	1	6
Parking availability	5	4	3	2	1	6
Access to places of interest	5	4	3	2	1	6
Signage **within** the area	5	4	3	2	1	6
Maintenance of the attractions	5	4	3	2	1	6
Authenticity of places accessible	5	4	3	2	1	6
Interest value in places accessible	5	4	3	2	1	6

6. How important to you are the following attributes when visiting **historical mining areas**? **(CIRCLE ONE NUMBER PER LINE) (SHOWCARD 6)**

	Extremely Important				Not at all Important
Learning more about Australia's past	5…….	4…	…..3	…2	…….1
Learning about the history of mining	5…….	4…	…..3	…2	…….1
Helping my children learn about Australia	5…….	4…	…..3	…2	…….1
Learning more about Australia's heritage	5…….	4…	…..3	…2	…….1
Seeing an aspect of Australia's heritage	5…….	4…	…..3	…2	…….1
Seeing well-preserved, old buildings	5…….	4…	…..3	…2	…….1
Being able to interact with exhibits	5…….	4…	…..3	…2	…….1
Having children's entertainment available	5…….	4…	…..3	…2	…….1
Having interpretative information available	5…….	4…	…..3	…2	…….1
Learning about what life was like back then	5…….	4…	…..3	…2	…….1
Having a guide explain things	5…….	4…	…..3	…2	…….1
Experiencing a different environment	5…….	4…	…..3	…2	…….1

7. Have you visited other cultural heritage places? ❑ Yes ❑ No

7a. If YES to 7, what have you **liked** about previous visits to cultural heritage places? **(TICK AS MANY BOXES AS APPROPRIATE) (SHOWCARD 7a)**

❑ friendly welcome	❑ an authentic experience	❑ good visitor amenities
❑ shopping for crafts	❑ nice cafes	❑ good information
❑ well-developed attraction	❑ peaceful surroundings	❑ other...............................

7b. If YES to 7, what have you **disliked** about previous visits to cultural heritage places? **(TICK AS MANY BOXES AS APPROPRIATE) (SHOWCARD 7b)**

❑ unfriendly welcome	❑ not an authentic experience	❑ poor visitor amenities
❑ overly commercial	❑ no cafes	❑ inadequate information
❑ poorly developed attraction	❑ too crowded	❑ other...............................

8. What kind of information would be useful to you in planning a visit to a **heritage place**? **(TICK AS MANY BOXES AS APPROPRIATE) (SHOWCARD 8)**

❑ a system of rating the **heritage value** of the place, e.g. four stars, five stars etc.
❑ availability of a trained guide who could provide interpretive information
❑ an indicator of how much time should be spent at the location
❑ a designated list of Australian National Heritage Places
❑ brief summaries of what is offered at each destination
❑ other ____

9. Which of the following methods of funding heritage places would you prefer? **(TICK ONE BOX ONLY) (SHOWCARD 9)**

❑ a well-maintained area, good signage and other information, a $10 per year heritage tax, minimal commercialisation
❑ a well-maintained area, good signage and other information, no heritage tax, substantial commercialisation
❑ area in gentle decay, minimal information, no heritage tax, no commercialisation
❑ area in gentle decay, good signage and other information, a $10 per year heritage tax, no commercialisation

10. In the last six months have you spent any leisure time on the following activities? **(TICK AS MANY BOXES AS APPROPRIATE) (SHOWCARD 10)**

❑ Reading general history	❑ Reading Australian history	❑ Popular concerts
❑ Visiting a museum	❑ Visiting heritage buildings	❑ Going to a restaurant
❑ Visiting a national park	❑ Country drives	❑ Cinemas
❑ Bushwalking	❑ Theatre, opera, ballet	❑ Overseas holiday

11. To help us better understand the profile of visitors, would you please tell me the age and gender of each member of your group:

(ENTER NUMBERS IN EACH BOX) (SHOWCARD 11)
(RECORD RESPONDENT'S AGE AND GENDER WITH A CAPITAL "R")

	< 20	20-29	30-39	40-49	50-59	60+	Refused
Female							
Male							

(NB: TOTAL MUST BE THE SAME AS QUESTION 1)

12. In which country do you reside?

❑ Australia ❑ New Zealand ❑ Canada ❑ USA

❑ UK ❑ Other Europe ❑ Japan ❑ Other Asia

❑ Other, please specify___________

ANSWER ONLY IF FROM AUSTRALIA

12a) What is your postcode? ☐☐☐☐

13. Is your tip to the Charters Towers region part of a package? ❑ Yes ❑ No – skip to Q. 17

14. How much is this package per person? **$** ☐☐☐☐

(FOR INTERNATIONAL VISITORS – AUSTRALIAN COMPONENT ONLY)

15. How many nights does this cover? ☐☐☐

16. How many nights in the Charters Towers region are included in this package? ☐☐

17. During this visit to the Charters Towers region, how much do you think your expenditure will be on: **(EXCLUDE COST OF PACKAGE TOURS) (ROUND TO WHOLE DOLLARS) (PER PERSON COSTS)**

Accommodation________________________________				
Meals, beverages (not part of accommodation)________				
Transport, petrol etc. ___________________________				
Site entry fees ________________________________				
Other entertainment ____________________________				
Shopping ____________________________________				
Other (health, hair etc.) ________________________				

18. How many nights are you staying in the Charters Towers region? [|]

(**WRITE '0' IF DAY TRIP AND SKIP TO Q.20)**

19. What is your main form of accommodation while in the Charters Towers region? **(TICK ONE ONLY)**

- ❑ Friends/Relatives
- ❑ Hotel/motel
- ❑ Bed & breakfast
- ❑ Caravan park
- ❑ Farm stay
- ❑ Self contained cottage
- ❑ Host accommodation
- ❑ Other (Specify)______________________

20. What is your main reason for visiting Charters Towers? **(TICK ONE ONLY)**

- ❑ To see the heritage sites
- ❑ Visit friends/relatives
- ❑ Holidays
- ❑ Personal
- ❑ Business
- ❑ Conference/seminar
- ❑ Side trip from Townsville
- ❑ Sport
- ❑ Weekend short break
- ❑ Other (Specify)________________________

21. What was the worst aspect of your visit to Charters Towers?

____

22. What was the best aspect of your visit to Charters Towers?

____

23. Overall, how satisfied have you been with Charters Towers? **(SHOWCARD 23)**

Very satisfied	Moderately satisfied	No feelings	Moderately dissatisfied	Very dissatisfied
❑	❑	❑	❑	❑

THANK THEM FOR THEIR TIME AND CONCLUDE INTERVIEW.

TO BE COMPLETED AT THE END OF EACH SURVEY

I hereby certify that I have conducted this interview in an accurate and professional manner, and have asked all questions in full as required.

Interviewer Name	Signature	Date
________________________	____________________	__________________

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