UNDERSTANDING TOURIST 'EXPERIENCES' AND 'BEHAVIOUR' IN CITIES

An Australian Case Study

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UNDERSTANDING TOURIST 'EXPERIENCES' AND 'BEHAVIOUR' IN CITIES

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SUMMARY

Objectives of Study

In 2007 Edwards, Griffin and Hayllar argued that research on urban tourism was not reflective of its degree of importance relative to tourism in other types of destinations, and little of that research had been conducted in Australia.

To address this imbalance this study aims to enhance the understanding of tourist experiences and behaviour in urban destinations by analysing the spatial movements of tourists, identifying the key attributes they are seeking in urban destinations, determining how important these attributes are to their experiences, evaluating how two urban destinations performed in relation to these attributes, and assessing whether there are key differences between different types of visitors to urban destinations.

Data were collected on tourists' movements and spatial behavior, the images they captured as memories, their expectations of 39 attributes grouped into five broad categories, and the perceived performance of the destinations in relation to these attributes. The ultimate aim of this project is to inform and guide the future governance and improved functioning of urban tourism destinations by developing a better understanding of the tourist in such settings.

Methodology

The study was conducted in Sydney and Canberra employing a variety of research methods in three phases. Phase one involved a detailed literature review relating to tourists' spatial behaviour, motivations, expectations and satisfaction to identify a range of destination attributes required by tourists in urban destinations.

In phase two tourists were tracked using Global Positioning System (GPS) devices that recorded the direction, time, location and pattern of their movement during a single day's visit of Sydney or Canberra. Using digital photography, the tourists captured their experiences contemporaneously with their spatial patterns. The assumptions and comprehensiveness of the literature review was tested through in-depth interviews with tracking participants.

Phase three focused on refining the destination attributes identified in phase one and two and incorporating them into a survey. The survey explores tourists' expectations on a range of attributes, how important the attributes are to the enjoyment of their visit, and how they would rate their satisfaction with their experience of the attributes in each of the cities.

Key Findings

- Visitor movement in Sydney is based on the city core or 'spine'.
- Sydney typifies a spatial system that is inward looking, has fragmented integration, disjointed parts and limited choices for experiencing a greater variety of urban spaces. This type of spatial system tends to facilitate repetitive movements.
- Once respondents in Sydney found a path from A to B they tend to retrace their steps or use the same path on future trips.
- Tourists visiting Sydney will walk up to 35 kilometres a day.
- To move tourists beyond the concentrated core, the means of facilitating such visitor movements needs to be identified and implemented, at both macro and micro levels.
- Tourists will make similar comparisons to other destinations they have visited using those places as a benchmark by which to judge the location they are currently experiencing.
- Managers have to be concerned with facilitating visitor movement on both macro and micro levels within Sydney.
- Random exploration is undertaken by visitors between visits to specific attractions and sites.

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- The dispersed nature of Canberra city means that visitors perceive walking to attractions as circuitous and time consuming.
- Tourists in the Canberra tracking study generally utilised the same roads, streets and patterns of movement.
- There is a clear emphasis on the use of private vehicles and a disinclination to experience Canberra by cycle or foot. 'Viewing from the car' is a common way in which Canberra is experienced.
- Repetitive touring in Canberra was uncommon.
- Trips in Canberra are planned with specific attractions in mind.
- Thirty-nine attributes were grouped under five categories: 'city environment', 'city experience', 'range of attractions' and 'food services' were chosen for expectation–importance– performance comparison. These attributes were found to have good internal consistency.
- Domestic and international tourists differ in their expectations of, perceived importance of, and performance of, destination attributes. This indicates that managing expectations and destination attributes to these two broad market segments will require different strategies.
- Image analysis suggests that the presentation of the images of a city through its iconic sites is an incomplete marketing message.
- Important marketing messages include: the positioning of people 'experiencing' a city; images of detail beyond the iconic sites; and an examination and presentation of different layers of experience within each destination.
- From the total respondents that visited Canberra and Sydney cluster analysis identified three sub-groups, 'the planners', 'spontaneous/repeat visitors' and 'the discoverers'.

Chapter 1

INTRODUCTION

In 2007 Edwards, Griffin and Hayllar (2007) argued that research on urban tourism was not reflective of its degree of importance relative to tourism in other types of destinations, and little of that research had been conducted in Australia. Subsequently recommendations were made for an Urban Tourism Research Agenda (UTRA) that would support the sustainable development of urban tourism in Australia. These recommendations were encapsulated in a framework (Figure 1) that would 'assist the prioritisation of research projects on urban tourism' within cities (Edwards, Griffin and Hayllar 2007, p. 22).

The framework identifies key urban tourism issues which in a logical order could, or should, be addressed in an analysis of urban precincts. It recognises that governance—policy, planning, design, management, marketing and communication activities—should be aiming to achieve positive outcomes with respect to: improved experiences for visitors; reduction of negative impacts and greater net benefits for the host community; and improved functioning of the total interdependent industry within the urban environment. Importantly the model suggests that the measurement of current performance identifies the baseline indicators from which to benchmark future management activities. The indicators can be used to monitor and evaluate the destinations goals and objectives and to set priorities for action.

Figure 1: Conceptual Framework for Urban Tourism Research
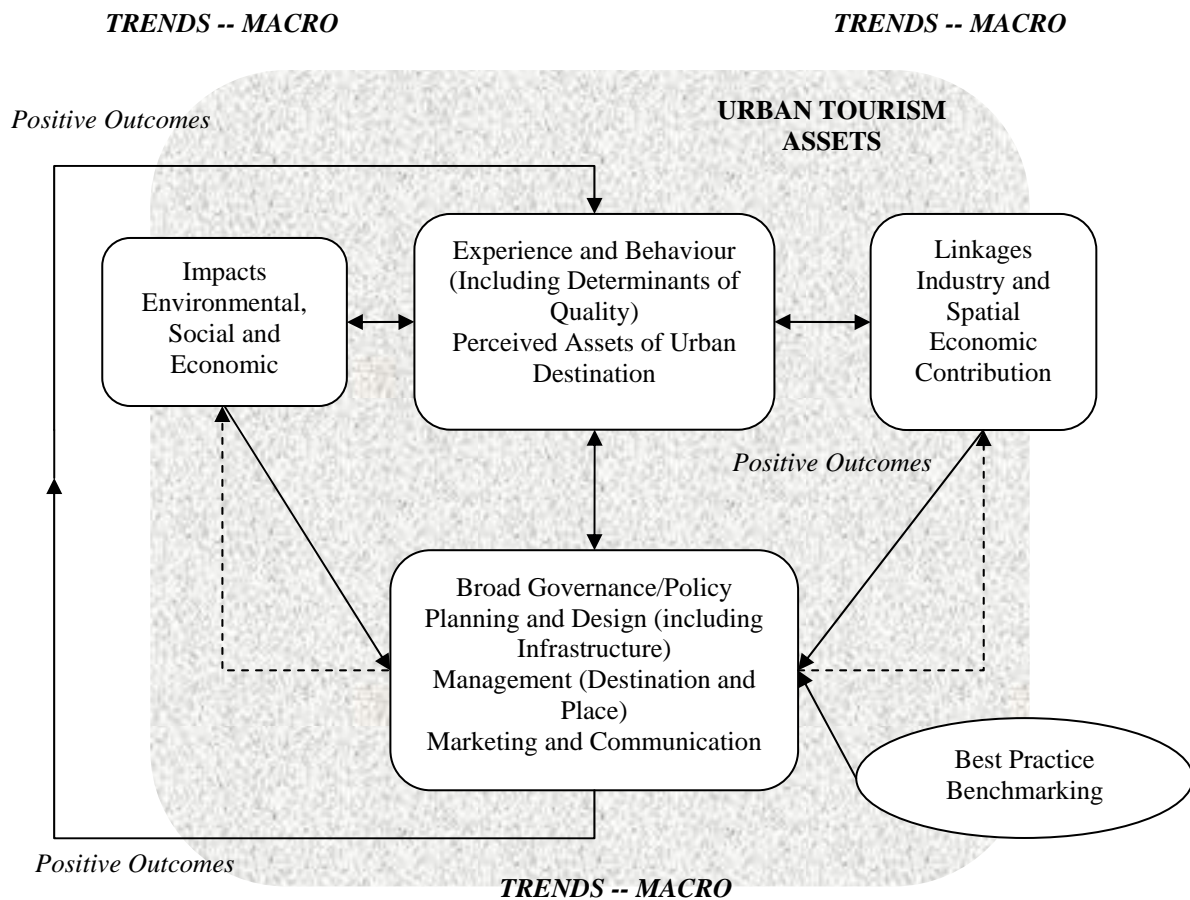
Urban destinations are multifaceted environments. The concept of urban is both virtual and real in that it encompasses places where people, as they move around, find themselves outside and inside structures. Therefore understanding the experience and behaviour of visitors as they undertake activities in urban destinations is

foundational to understanding the ensuing impacts that occur and how key elements of the industry can serve the visitors' needs and meet their expectations.

Experience and behaviour issues are also linked to economic and spatial considerations of industry through product delivery and the economic benefits realised from visitors. Similarly, visitor experience and behaviour will influence governance and planning issues that guide infrastructure and management aspects at the urban destination.

This study aims to enhance the understanding of tourists' experience and behaviour in urban destinations by analysing the spatial movements of tourists, identifying the key attributes they are seeking in an urban destination, determining how important these attributes are to their experience, evaluating how two urban destinations performed in relation to these attributes, and assessing whether there are key differences between different types of visitors to urban destinations.

Chapter 2

LITERATURE

The Spatial Behaviour of Tourists in Cities

Selby, Hayllar and Griffin (2008) in a critique of textual and representational studies note that there is a tendency for such studies to read landscapes on behalf of people, rather than seeking to understand how they experience such places. They argue that understanding the tourists' perspectives and aspects of the way in which they visit places, such as their spatial movements, the time they spend and the services they utilise, can provide valuable information for many engaged in the management and study of tourism. The information can be used for such purposes as informing location choices for restaurants, accommodation or attractions in order to maximise exposure to visitor traffic. Government agencies and destination managers can use the information to inform planning decisions, redirect visitor flows to avoid overcrowding, minimise adverse impacts on sensitive sites, concentrate marketing activities, inform transport policies and more broadly distribute expected benefits.

In evaluating patterns of international tourist flows Mansfeld (1990) suggests that tourism space can be viewed in three ways: actual space which denotes the area that accommodates tourism activities and has clear geographical boundaries; functional space which views tourism space as including both generating and attracting areas; and perceived space which refers to the personal perceived images of space that tourists have on an individual level. McKercher and Lau (2008) explain that generating and attracting areas can be analysed at various scales including inter- and intra-destination.

Using a space-time budget to examine how tourism groups use facilities, attractions, transportation and accommodation Fennell (1996) found that the infrastructural capacity of a region will influence how tourists spread themselves out. Lew and McKercher and (2006) suggest that tourist spatial patterns can be classified into four broad themes: single destination with or without side trips; transit leg and circle tour; circle tour with or without multiple access points; and a hub and spoke style. However, they argue that mapping tourist movements is 'complicated by the virtually unlimited number of places that tourists could visit, an unpredictable sequencing order between places, the potential for stochastic movement patterns that may follow no logical pattern, and the unique needs and wants of individual tourists' (McKercher & Lau 2008, p. 357). Extending previous work McKercher and Lau (2008, p. 365) reported that tourist movements in Hong Kong could be reduced to 11 broad styles:

- no movement— the individual stays in the hotel for the entire day;
- unspecified local exploration only—unspecified wandering within 500 metres of the accommodation locus;
- local exploration with specified stops—as above but with specific stops identified;
- single distant stop—a journey trip more than 500 metres from the accommodation locus to a specified attraction or attraction node;
- multiple distant stops—a journey trip more than 500 metres from the accommodation locus to more than one specified attraction or attraction nodes;
- local exploration and a single distant stop—unspecified wandering within 500 metres of the accommodation locus plus a journey trip more than 500 metres from the hotel to a specified attraction or attraction node,
- local exploration and multiple distant stops—unspecified wandering within 500 metres of the accommodation locus and a journey trip more than 500 metres from the hotel to more than one specified attraction or attraction nodes;
- multiple trips—more than one journey taken in a day, returning to the accommodation locus before voyaging out again;
- inter-destination travel—a day trip to a neighbouring destination;
- tour with or without other activity—purchase of a commercial sightseeing tour with or without any other activities undertaken;
- multiple day trips including a tour as one of the trips—more than one journey from the accommodation locus during the day, one of which involves a commercial day tour.

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Shoval (2007) in a tracking study conducted in a small historic area of the Old City of Akko, noted that tourist flows were dispersed unevenly throughout the Old City's various locales, with many visitors only visiting the key areas such as the Visitors Centre, The Crusaders' Halls and the Turkish Bath. He argues that routes in these sorts of environments are 'often tightly, if discretely, controlled with people all too frequently being subtly maneuvered into making particular time-space choices: when and from where to set off, and in what direction; when, where, and for how long to stop at specified locations; when to move on and to where' (p. 25).

With the exception of Fennell (1996) these studies appear to consider tourist movements in isolation of the design and infrastructure of the destination. How tourists are impacted by aspects of the destination such as streetscapes, sightlines, land use, the scale of the destination, available transport, signage and location and dispersal of attractions can either enhance or inhibit the ability of people to move around an urban destination. Boerwinkel (1995) considers two fundamental types of spatial order that influence peoples spatial movements: successive arrangement and simultaneous arrangement. Successive arrangement refers to spatial systems that control and confine a tourist's choice in terms of sight and movement. Successive arrangements are typified by spatial systems that tend to generate fragmentation with disjointed parts with limited choices in experiencing space. Essentially there are few and dispersed lively spaces resulting in people becoming stuck in a core and finding it difficult to penetrate all parts of the system.

Simultaneous arrangement refers to a sequence of lively spaces connected to each other. It provides the user with many choices in terms of sight and movement and is characterized by a system that enables the tourist to cover all the different parts. Simultaneous arrangement encourages the tourist to freely move from one space to another facilitating exploration and 'by-chance-encounters'. In this context Stonor (2008) recommends that, as opposed to the separation of land uses, mixed use zones, spatially integrated networks and mixed transport modes are essential for urban places to be successful.

Designing the urban form to meet the needs of tourists requires collection and evaluation of data on tourists' spatial behaviour. However this can be difficult because of the labour intensive nature of methods such as large surveys, traffic and people counts, travel or trip diaries, and observation. Global Positioning System (GPS) technology now makes it possible to accurately track the paths tourists are taking and to provide greater understanding of the socio-spatial behaviour of tourists. This requires a strategic urban planning process.

The Global Positioning System (GPS) and Web 2.0 applications

GPS is a precise positioning tool that started as a navigation concept and has grown to an operational system of 24 NAVSTAR earth-orbiting satellites (McDonald 2002). The growing importance of global satellite navigation systems is reflected in the European Commission's investment into the European regional augmentation of GPS (EGNOS) as well as the development of the European global navigation system entitled GALILEO (Directorate-General Energy and Transport (2007).

Navigation satellites allow any person who owns a device that incorporates a GPS receiver to determine their longitude, latitude and altitude anywhere on Earth. For location positioning at least three satellites are required. Over the past 10 years, and particularly in the last three, the development of products that incorporate GPS capabilities has expanded at a rapid rate. Uses of GPS have extended to include both commercial and scientific applications. Commercially, GPS is used as a navigation and positioning tool in airplanes, boats, cars, and for almost all outdoor recreational activities such as cycling, hiking, fishing, and kayaking.

Web 2.0 is also providing access to other evolving programs including Google Earth and Flickr. GPS and Web 2.0 are exciting technologies that offer products and platforms that can enhance tourism research. These tools provide an opportunity to undertake research on how tourists navigate the urban environment, what trails they take during their visit, why they have taken a particular trail, what barriers they encounter, what modes of transport they use and what memories they take away with them.

GPS offers several advantages over traditional methods, as it allows the precise and continuous tracking of individuals and provides spatially rich data including velocity and timing information (O'Connor, A., Zerger, A. & Itami, B. (2005)). Studies using GPS technology have for example been carried out in Copenhagen (Shoval and Isaacson 2006), in Tel Aviv-Jaffa and in the German city of Heidelberg (Freytag 2003).

Visitor behaviour and movement have also been tracked in specific tourist settings such as theme parks, where Kempermann, Chang-Hyeon and Timmermans (2004) recorded significant differences between first time visitors and repeat visitors. It was found that new visitors try to get to as many attractions as possible, whereas

repeat visitors are more selective and focused. Arrowsmith and Chhetri (2003) undertook a pilot study using handheld GPS receivers to monitor the movement patterns of tourists through a national park in southwest Victoria, Australia and ten Hagen, Kramer, Modsching and Gretzel (2006) captured the spatial behaviour of tourists in the inner city of Görlitz, Germany. Unfortunately, none of the articles articulated the type of devices that were used.

Capturing Experiences

Tourists take photographs of their experiences for a number of reasons. Images convey the experience of the person who captured it because the image provides a record of how they saw and interpreted the world, the people and places in it and the meanings and associations that their experience conjured up (Markwell 2000). Photography is often used as proof that the experience was had (Markwell 1997). That is, it is a way in which a person can communicate an experience they have had in a particular place and time to an audience in another place and time (Crang 1997). The image becomes a keepsake and memory of the experience; it ties the images to the real world as proof to second and third parties or to the traveller themselves (Crang 1997; Van Dijck 2008). In doing so the photograph forms part of their process of communication and identity formation (Van Dijck 2008).

While recording or collecting experience is one dimension of photography, Sontag (1977) also points to the more phenomenological nature of the tourists' photographic experience. Photography records but also shapes experience. Seeking opportunities for the 'shot' changes the nature of the encounter—a change from the visual, aural and visceral toward a more technically mediated encounter. Sontag further suggests that doing something (a type of working at experience) also 'appeases the anxiety which the work-driven feel about not working when they are on vacation and supposed to be having fun' (p. 10).

The purpose of analysing tourist images is to try and understand the types of experiences that tourists have for as Sontag (1978, p. 3) notes 'photographs really are experience captured'. This idea draws from the notion of the 'circle of representation' (Jenkins 2003). According to Jenkins, the idea of visual images circulating within a culture and becoming imbued with particular meanings, associations and values is not new and although it is referenced in different terms it is common across a number of disciplines. At the centre of this circle are the images projected through advertising such as an image of the Sydney Harbour Bridge or Parliament House. When people visit the destination in which they have previously seen the advertised image they are likely to capture their own image of that attraction, through the medium of photography.

Knowledge gained from understanding the importance of, and meanings given to, the images people capture can inform marketing campaigns that suit the types of experiences marketers know people will enjoy and want to take home with them. However, the meaning intended by the photographer and the meaning the observer derives from the image may be different. Clearly the observer can only interpret 'implied meaning' from an image. This implied meaning is both personally and culturally determined. To this extent the analysis and interpretation of images is inherently problematic.

To gain a level of understanding of images inevitably involves some form of classification, grouping or filtering process to bring 'order' to a collection. Visual semiotics involves determining what is denoted and connoted within images for the purpose of 'decoding visual images into written form' (Markwell 1997, p. 136). It is a reflective process which recognises that analysing images is subjective and can only occur within an interpretivist paradigm (Markwell 2000, p. 91). According to Van Leeuwen (2001) denotation and connotation form the overall meaning of the image. Denotation is what is represented in the image, such as 'who and what are the (kinds of) people, places and things depicted ... and how do we recognise them as such?' Connotation is the meaning that is drawn from the image. It is based on the ideas and values associated with the people, places and things which are depicted in the image (Van Leeuwen 2001).

Expectations, Importance and Performance

Expectations have been explained as an imaginary situation to which is assigned a degree of belief that the situation will occur, a belief that a particular act will be followed by a particular outcome (Shackle 1952), an individual's state of mind with respect to an assertion, a coming event, or any other matter on which they have some degree of knowledge (Georgescu-Roegen 1958), and pre-purchase beliefs or evaluative beliefs about a product (Olson & Dover, 1979; Oliver 1980).

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In a tourism context Gnoth (1997) defined expectations as 'tentative (mental or neural) representations of future events or unfinished learning processes' (p. 298). Gnoth suggests that expectations and attitudes are similar in that they are a mix of cognitions, affect and conations and that both expectations and attitudes may have an effect. In situations where destinations or experiences are new to the tourist, the impact may be more important. For Gnoth, expectations are emotion-dominant, but the impact may only be small. The centrality of emotion in expectations is reflected by Font (1993), who commented that 'people are buying expectations instead of something immediately evaluative. In essence, they rely much more on their preconceived image. An image is not what tourists 'know', but what they 'think' or 'feel', (Font 1993, p. 126). Expectations may also be influenced by people's prior experiences of places or services (Smith & Swinyard 1983).

As with Font (1993), other writers have also positioned expectations as related to images. Buhalis (2000) has suggested that prior to visiting a destination, tourists 'develop an image about destinations as well as a set of expectations based on previous experience, word of mouth, press reports, advertising, and common beliefs' (p. 99). The image is 'the set of expectations and perceptions a prospective traveller has of a destination' (Buhalis 2000, p. 99), this reflects Crompton's definition of image that is 'the sum of beliefs, ideas and impressions that a person has of a destination' (1979, p. 18). Both of these definitions draw upon terms that encompass visceral, visual and verbal 'images' that reflect the different ways people experience and make sense of the world (Ellis & Flaherty, 1992). The tourists' measure of satisfaction will be a result of the comparison of their experience or event against their image, expectations and perceptions.

Martilla and James (1977) theorised that satisfaction is a function of both expectations related to certain important attributes and judgments of the attribute performance. Their importance–performance analysis (IPA) technique (Martilla & James 1977) has been proven to be an effective managerial tool in evaluating customer satisfaction with a product or service. IPA has been widely applied by many researchers in various areas such as tourism, banking, foodservice, health care, education and marketing (Cheron, McTavish & Perrien 1989; Cunningham & Gaeth 1989; Almanza, Jaffe & Lin 1994).

In tourism studies, the IPA model has been used to analyse the performance of tour guides (Zhang and Chow, 2004), escorted tours (Almanza, Jaffe & Lin 1994), a ski resort (Uysal, Howard & Jamrozy 1991; Hudson & Shephard 1998), a marine park (Tonge & Moore 2007), tourism policy issues (Evans & Chon, 1989), and destination image and attractiveness (Chon, Weaver, and Kim 1991; Go & Zhang 1997; Joppe, Martin & Waalen 2001; Litvin & Ling 2001; Enright and Newton 2004). An extension of the IPA was introduced by several authors who have applied the model to develop an importance–performance gap analysis by contrasting the perspectives of different respondents (Brown & Swartz 1989; Oppermann 1998; Litvin & Ling 2001).

Martilla and James (1977) proposed an importance–performance grid divided into four quadrants (see Diagram 1). In essence, IPA involves the importance individuals attach to a given set of attributes and their judgment of performance in relation to these attributes, thus enabling a comparison of importance and performance of certain attributes. The relationship of the mean values of the importance and performance scores of each attribute is then graphically presented on a grid. The Y-axis represents the perceived importance of certain attributes, and the X-axis reports the perceived performance of those attributes, typically equated to degrees of satisfaction. The location of each attribute within a particular quadrant implies a specific management response, as described below:

Quadrant I: 'Keep up the good work'
Attributes are considered to be very important to respondents, who also perceive them to be performing well.

Quadrant II: 'Concentrate here'
Attributes are perceived to be very important to respondents, but performance levels are fairly low. This suggests that improvement efforts should be concentrated on this set of attributes.

Quadrant III: 'Low priority'
Attributes here are rated as having low importance and low performance. Although performance levels may be low, managers should not be overly concerned, since the attributes in this cell are not perceived to be very important. Limited resources should be expended on this low priority cell.

Quadrant IV: 'Possible overkill'
This cell contains attributes of low importance, but where performance is relatively high. Respondents are satisfied with the performance, but managers should reconsider whether some of the present efforts or resources devoted to the attributes in this cell are necessary (Chu **&** Choi 2000; Oh 2001).

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In essence, the IPA provides ease of application in presenting both data and strategic suggestions in a simplistic graphic presentation (Martilla & James 1977; Oh 2001).

Diagram 1: Importance–Performance Analysis Grid

Importance		
Quadrant II Concentrate here High Importance Low Performance	Quadrant I Keep up the good work High Importance High Performance
Quadrant III Low Priority Low Importance Low Performance	Quadrant IV Possible Overkill Low Importance High Performance

Performance

Chapter 3

RESEARCH METHODS

The two main data collection activities were visitor tracking supported by photography, and a survey of visitors to investigate their expectations and perceptions of the performance of Sydney and Canberra on 39 attributes.

Visitor Tracking

To better understand the spatial movements of tourists in the urban environment, the trails they take during their visit, why they have taken a particular trail, the barriers they may encounter, the modes of transport they use and the memories they take away with them, visitors were tracked using GPS devices in two destinations, Sydney and Canberra as well as being asked to capture their experiences using digital cameras that were supplied.

Canberra is a 'new' capital, purpose-built to be the seat of national government and centre of administrative and diplomatic activity in Australia. Canberra's design is centred on substantial greenbelts surrounding areas of settlement with wide boulevards, monumental public buildings, formal parks and water features. The design takes particular account of the topography resulting in a triangle formed by imaginary lines joining three small mountains (Mt Ainslie, Black Mountain and Red Hill) whose contours give shape to the shallow valley in which the core of the city is located. The creation of a lake within the triangle was formed by damming the Molonglo River that ran through the valley floor. Inside the triangle, national buildings are grouped to the south of the lake (now called the Parliamentary Triangle) and municipal buildings to the north, with residential suburbs grouped on both sides.

Sydney is the largest city in Australia, and the capital city of New South Wales. Sydney has a metropolitan area of approximately 12,000 square kilometers and is located in a coastal basin between the Pacific Ocean to the east and the Blue Mountains to the west. The city features the largest natural harbour in the world, Port Jackson, and more than 70 harbour and ocean beaches, including Bondi Beach. Sydney is often referred to as the 'Harbour City', and structures on the Harbour such as the Sydney Opera House and the Sydney Harbour Bridge are globally recognised icons. High amenity and services are available in and around the CBD.

Tracking locations and venues

Participants were recruited from three accommodation venues in Canberra (Image 1) and four accommodation venues in Sydney (Image 2). The choice of each venue for recruiting participants was moderated by its geographic location within the city, its management's willingness to participate, access to wireless Internet connection, and the level of accommodation offered. The seven venues selected were:

- Canberra City YHA Backpackers Hostel
- Hotel Kurrajong Canberra
- Pavillion on Northbourne Canberra
- Sydney Central YHA
- Bondi Beachouse YHA Sydney
- Y Hotel Hyde Park Sydney
- Y Hotel City South Sydney

We were satisfied with the range of geographic locations in Canberra—north of the city, in the centre of the city and south of the city centre. Geographically these locations sit within the two districts of North Canberra and South Canberra. These locations offered three distinct starting points for tourists' engagement with the city.

Canberra City YHA is in the centre of the CBD, within five minutes of the interstate bus terminal and within walking distance to major shopping centres. The Hotel Kurrajong is a five star establishment in a heritage-listed building, approximately five kilometres south east of the centre of Canberra. It is positioned adjacent to what is known as The Parliamentary Triangle and is within easy driving distance of the main attractions. The Pavilion on Northbourne Hotel is a four star hotel located two kilometres north of the city centre, and is also within easy driving distance of Canberra's major attractions.

Image 1: Canberra Tracking Locations
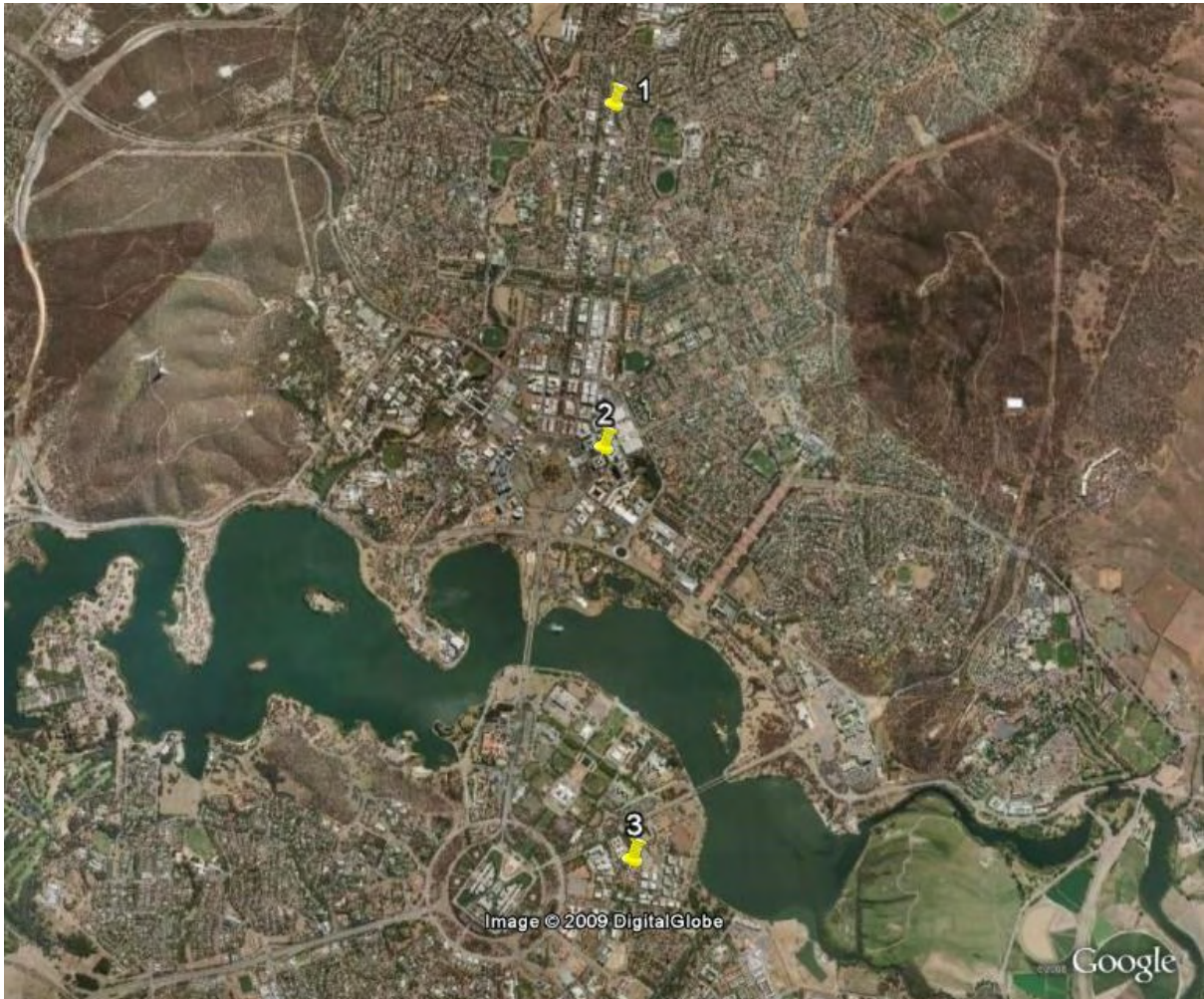
1. Pavillion on Northbourne; 2. Canberra City YHA Backpackers Hostel; 3. Hotel Kurrajong. ©2008 Google; Image ©2008 Digital Globe

The geographic locations of the venues in Sydney were not as diverse and dispersed as they were in Canberra, with three being located at the southern end of the city centre, and only one being outside the city centre. This was largely dictated by the reluctance of other accommodation managers in Sydney to permit the researchers to recruit participants on their premises.

Sydney Central YHA is located in a heritage-listed building opposite Central Railway Station at the southern end of the CBD. It is accessible to most of the city's major attractions such as the Opera House, Harbour Bridge, The Rocks, Darling Harbour and Centrepoint Tower. Bondi Beach YHA is located at the southern end of Sydney's famous Bondi Beach. Visiting the CBD from this hostel requires the use of public or private transport. Y Hotel Hyde Park is a three star bed and breakfast hotel located on the eastern side of the CBD opposite Hyde Park and Oxford Street. It is within walking distance of Darling Harbour, Chinatown, city shops, the Opera House, Paddington and The Rocks. Y Hotel City South is a three star bed and breakfast hotel on the southern edge of the city, close to Prince Alfred Park, Sydney University, Central Railway Station and Broadway.

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Image 2: Sydney Tracking Locations
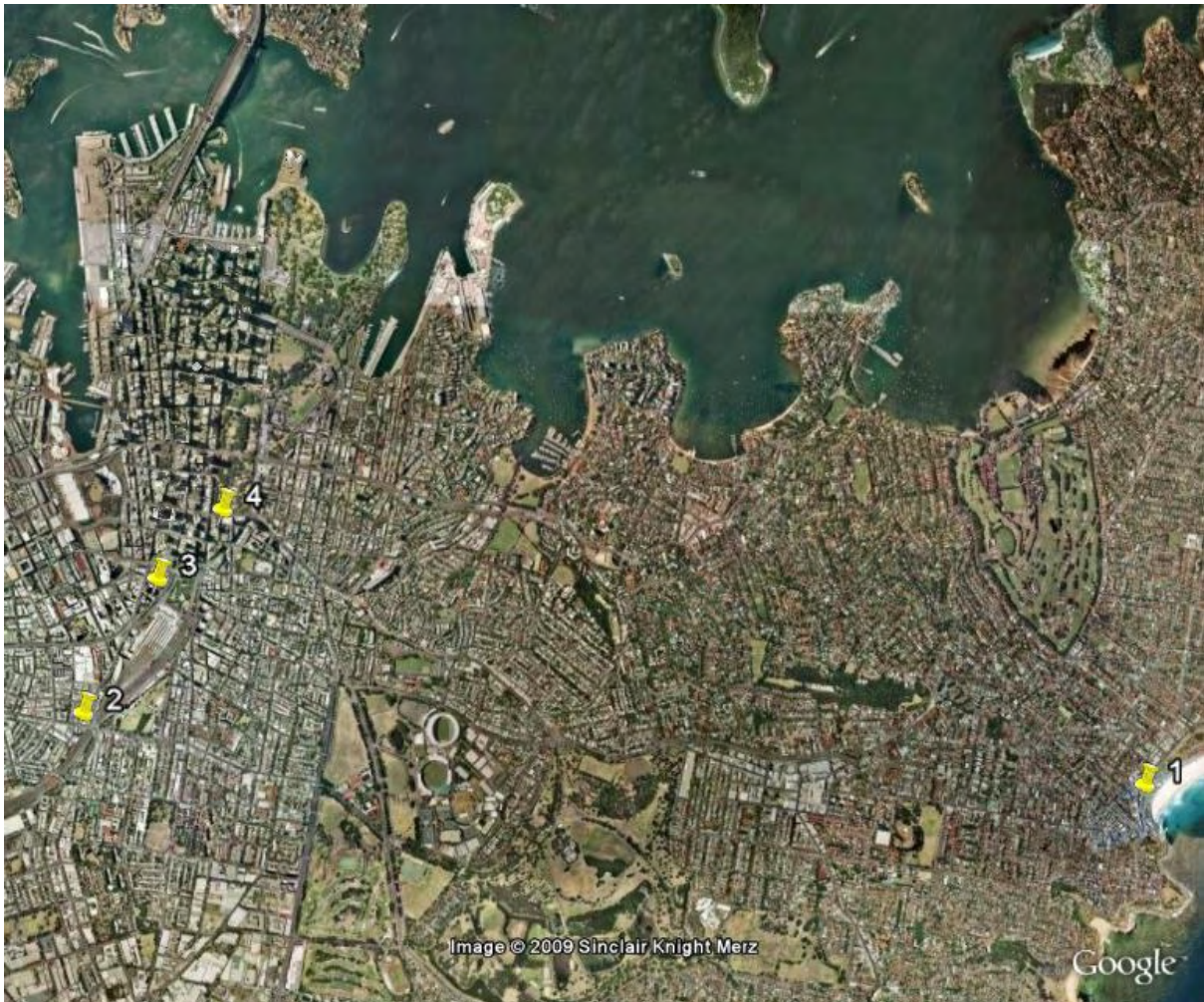
1. Bondi Beachouse YHA; 2. Y Hotel City South Sydney; 3. Sydney Central YHA; 4. Y Hotel Hyde Park Sydney. ©2008 Google; Image ©2008 Sinclair Knight Merz

Administration

Information letters were distributed in each venue advising guests of the project, explaining what they would be required to do if they participated, and providing details of the incentive they would receive for taking part. Depending on the location (Sydney or Canberra) they were asked to wear or carry a GPS tracking device that would record their location, time, speed, distance and direction for one day. Visitors were provided with a digital camera and asked to take images as though they were using their own camera. There was no limit to the number of images they could take, the type of image taken or objects of interest.

The tracking study employed two different devices utilising GPS technology, GPSports SPI Elite and Garmin Forerunner 305. Both devices record time, speed, distance, position, altitude and direction. The Garmin 305 comes with its own software and is compatible with a free program downloadable from the web, 'Zone Five Software', which is user friendly and incorporates a number of features that proved helpful for data collection. In a small trial of both devices it was found that they collected comparable data.

To support the tracking study a questionnaire was designed to capture demographic information about participants, along with their purpose for visiting, the activities they engaged in, mode/s of transport used during the day and any barriers they encountered. Upon returning to their accommodation at the end of the day members of the research team debriefed each participant and administered a semi-structured interview regarding their expectations for their visit.

The debriefing comprised four parts: participants were asked to complete the questionnaire; their images were uploaded onto a laptop and reviewed with a researcher; the data collected from the GPS devices were downloaded and the tracks were overlaid onto a Google Earth Map of either Sydney or Canberra for a visual representation of the participant's trail; and an open-ended discussion was held with participants about their expectations for their visit to Sydney or Canberra. The track was reviewed with the participant with the researcher taking notes of any wayfinding difficulties, the participant's reasons for choosing sites and their activities of interest. Participants requested the data to be personalised and trails were labelled using their first names. A total of 76 trails were captured, 40 in Sydney and 36 in Canberra.

In terms of digital photography, 2954 images—1114 in Canberra and 1840 in Sydney—were collected. Following data collection the images were loaded onto Flickr, a photo sharing website, and participants were invited to write brief comments on their images explaining why they took a particular photograph. To bring order to the images they were classified, grouped by content and reflected on in relation to participant comments.

Survey

Instrument Design

A survey was conducted in both Sydney and Canberra, to determine the expectations that tourists had of their visit in relation to certain destination attributes, how important these attributes were perceived to be, and how each city performed in relation to these attributes. Martilla and James (1977) emphasised that the selection of attributes for measuring importance and performance is critical to the effectiveness of the IPA. They proposed several sources for the development of the attribute list, including previous research, qualitative research techniques (e.g. focus groups and unstructured personal interviews), and managerial judgment. These sources can be also used for screening the attribute list in order to arrive at an appropriate size, reflecting the most influential factors of a product or service.

In accord with these recommendations, the questionnaire design was informed by utilising previous research and findings from the in-depth interviews held with participants during the visitor tracking study. After piloting the questionnaire with the Industry Reference Group and a convenience sample of ten people from outside New South Wales a total of 39 attributes were chosen and, using face validity, grouped under five categories: city environment; city experience; range of attractions; services; and food services. The categories and their items are:

Table 1: Categories of City Destination Attributes

Categories	Items
City Environment	Cleanliness; good weather; spacious urban environment; modern/ visual appeal; interesting architecture; old/historic visual appeal; dense built environment; and a variety of recreational parks.
City Experience	No language barriers; family friendly environment; opportunity to meet local people; opportunity to experience a local way of life; vibrant nightlife; multicultural experience; sense of excitement; vibrant urban atmosphere; relaxed local people; friendly local people; helpful local people; and a relaxing place to visit; and good to walk around.
Range of Attractions	Special events; music and performance; unique history/heritage sites; interesting activities; and museums and galleries.
Services	Reasonable priced local transport; local transport easy to use and understand; reliable local transport; convenient opening hours; good signage (directions); good availability of tourist information; and easy to find attractions and services.
Food services	Reasonable prices; family oriented; good quality; healthy and fresh; good variety of services; and good availability of foods.

In addition, Martilla and James (1977) noted that in order to minimise compounding and order effects, the separation of the importance measures and the performance measures is recommended. By structuring the questionnaire into distinct sections (placing the importance measures in one section and all of the performance measures in a later section), the respondent moves in a natural progression from general to more specific

questions with a separation between their ratings for each attribute. To divide the IPA matrix into four quadrants Deng (2007) argues for the use of the mean of all implicitly derived degrees of importance for attributes and the mean of all performance for attributes.

In accordance with these recommendations the questionnaire was constructed into three distinct sections that asked: the level of expectations tourists had with respect to each of these attributes; how important each attribute was to the enjoyment of their visit; and how they would rate their satisfaction with each attribute. These questions were answered in relation to the specific city they were visiting at the time, Sydney or Canberra. In each section respondents were asked to rate each attribute on a 10 point Likert scale. In relation to satisfaction, respondents were able to state if they did not experience an attribute.

The questionnaire also included a series of questions on trip purpose, number of times visited, trip duration, accommodation, places visited and sources of information used prior to visit. A copy of the questionnaire is provided in Appendix A. For the purposes of the survey a tourist was defined as an international tourist, an interstate tourist or an intrastate tourist coming from outside the boundaries of the Sydney and Canberra metropolitan regions.

Administration

The instrument was administered via both an online survey and a postal survey. Email addresses and/or postal addresses were collected at entry points to major attractions and visitor information centres within Sydney (see Appendix B), while email addresses gathered during previous research of visitors to Canberra were used for the Canberra visitors' survey. In Sydney fieldworkers approached tourists and asked if they would like to participate in a survey. If they agreed their contact details were recorded and subsequently entered into a database. Between two and three weeks later they were sent a link to an online survey or posted a hard copy of the questionnaire. This meant that people responded to the survey after their visit to Sydney or Canberra. Postal questionnaires were returned via reply paid envelopes. Participant contact details were collected from early October 2008 through to early December 2008. Responses were collected from late October 2008 through to early February 2009.

In all 3499 email invitations and 126 postal questionnaires were distributed for the Sydney sample. A total of 1018 useable responses were received (effective response rate—28%). A total of 4609 email invitations were distributed for the Canberra sample of which 444 useable responses were received (effective response rate—9.6%). Participants had the opportunity to be entered into a $500 cash prize draw for Sydney visitors, and 2 x $200 shopping vouchers for Canberra visitors. Participants were asked to respond within three weeks if they wanted to be entered into the prize draws.

Data Analysis

Visitor tracking

The software supporting the GPS devices enabled the overlaying of trails onto Google Earth. Data from the GPS combined with Google Earth provided clear evidence of the path taken, speed travelled (which assists in determining if the mode of transport was motorised or non-motorised), and time of day. Trails were overlayed individually and then collated onto one map, showing individual trails or the intensity of activity along particular paths. In Google Earth 'spikes' could be smoothed out where necessary. Spikes are excess trail lines that accrue when the GPS does not have a clear view of the sky such as when a person is indoors or in areas with many tall buildings, or when remaining in one position for any length of time.

Survey

The extensive number of questions in the three sections on expectations, importance and performance impacted on the length of the survey and in some cases response fatigue was evident. In these cases responses were deleted. Data were entered into the Statistical Package for the Social Sciences, version 17 (SPSS) for data analysis. Methods included descriptive statistics, T-Tests, Cluster analysis and IPA. Table 2 presents the mean scores, standard deviations, and scale alphas for the variables: expectations, importance, performance, and satisfaction with experience. It illustrates that internal reliabilities for all variables were high with coefficient alphas ranging from .95 to .97. Although the 39 items were grouped into five categories based on face validity the high alpha values indicate good internal consistency among items within each category.

Table 2: Mean scores, Standard Deviations (SD) and Reliabilities (α)

Variables	No of items	Mean[a][b]	α
Expectations	39	6.570	.953
Importance	39	7.177	.946
Performance	39	7.450	.969

[a] Lower scores indicate lower levels for each variable; [b] Scale Range 1—10 for each variable.

Chapter 4

FINDINGS

Tourist Trails

The debriefing interview and participant trails provided useful information on how people orientated themselves and barriers that inhibited their movement, highlighting that both Canberra and Sydney have significant issues. Some of these issues are shared while others are distinctly related to the spatial design of each city. There are factors that restrict visitors' spatial engagement with both cities and impact on the dispersal of potential economic benefits.

Sydney

Demographic Profile

In Sydney, 47% of participants were male and 53% were female with 54% having visited before. The majority were travelling with one other person (48%) or alone (26%) with international tourists making up 72% of all participants. A fair range of ages was involved, although slightly over half of the respondents (55%) were aged between 20 and 39 years. Most used walking as their major form of transport (63%) with 77% also incorporating other forms of transport such as train, ferry and bus during the day on which they were tracked. Their main purposes for visiting Sydney were sightseeing (37%) or for a holiday (37%).

Table 3: Sydney Participant Characteristics

Age Group		Explorer Bus 1%
18–19 8%		Rental car 2%
20–29 30%		**Main Purpose of Visit**
30–39 25%		Sightseeing/General interest 37%
40–49 18%		Holiday 37%
50–59 13%		Visit friends and relatives 3%
60–69 7%		Educational reasons 3%
Transport Used		Business/conference 2%
On foot 63%		The attractions 2%
Train 31%		Special event/ festival 2%
Own car 21%		**Visited Before**
Ferry 23%		Never 46%
Normal Bus 19%		Once 18%
Monorail 3%		Couple of times 26%
Bicycle 3%		Many times 10%

Tourist Movements in Sydney

Visitor movement in Sydney is based on the city core or 'spine' (Image 3). Only five trails ventured further afield than Manly, to Palm Beach, Watsons Bay, Parramatta, Beverly Hills and Homebush Bay. Repetitive movements can be seen in Image 4, that is once people have found a path from A to B they tend to retrace their steps or use the same path on future trips. There is a tendency for tourists to focus their movement around the George Street, Darling Harbour and Central Business District (CBD) (see Image 3 and 5).

   The Bondi trail (Image 3) represents the recruitment of one participant from Bondi Beachouse YHA. We were unsuccessful in recruiting other participants from Bondi as tourists stated that they stayed at Bondi with the specific intention of enjoying the beach. If they wanted to visit other sites around Sydney then they would stay in

accommodation closer to those sites, that is, the city centre. Even though the trail in Image 3 is from a different geographic location it is similar to others recruited from inner city locations.

The trails suggest that Sydney has a spatial order which is labeled by Boerwinkel (1995) as successive arrangement: a spatial system that generates fragmented integration with disjointed parts with limited choices in experiencing space resulting in people becoming stuck in a core and finding it difficult to penetrate all parts of the system.

The implication is that if it is considered desirable to move tourist beyond the concentrated core, then the means of facilitating such visitor movements need to be identified and implemented, at both macro and micro levels. The failure of tourists to venture off the very well-trodden paths or to explore the city via alternative routes suggests one of two things: there are not the means to do this easily; or there are significant physical or psychological barriers that prevent this from occurring. If the latter applies, it could be due to a physical environment within parts of the city that is neither inviting nor suggestive that exploration will be rewarding for the visitor.

Image 3: All Sydney Trails
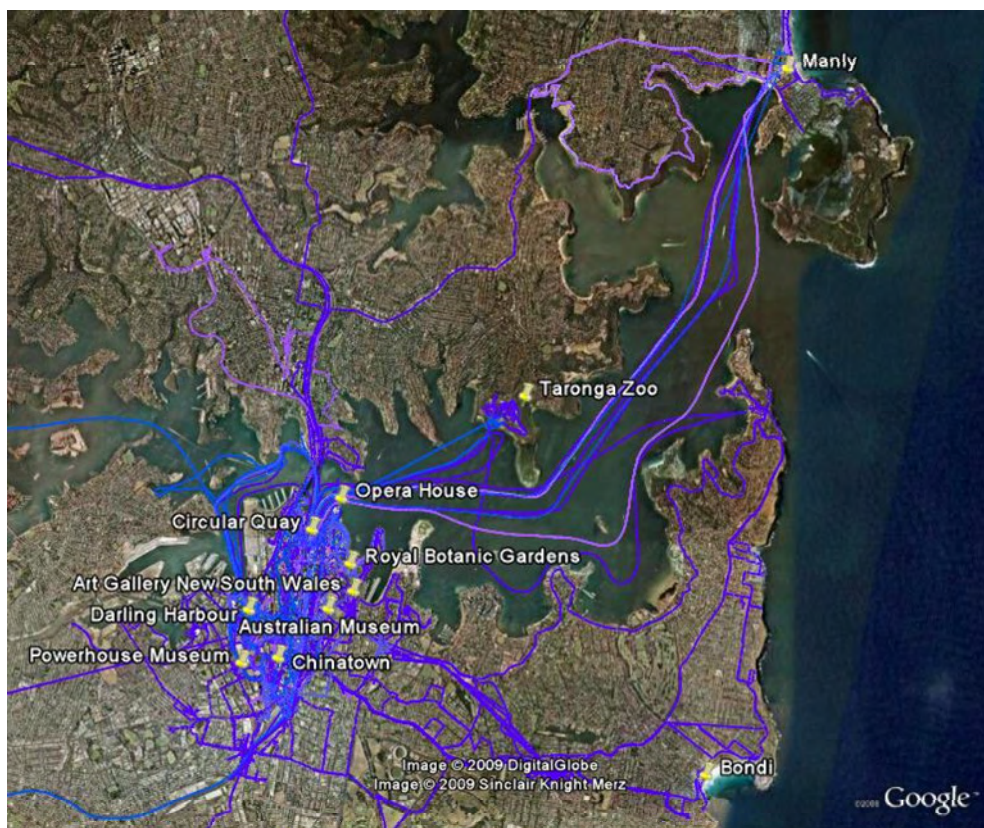
Image 4: Repetitive Trip
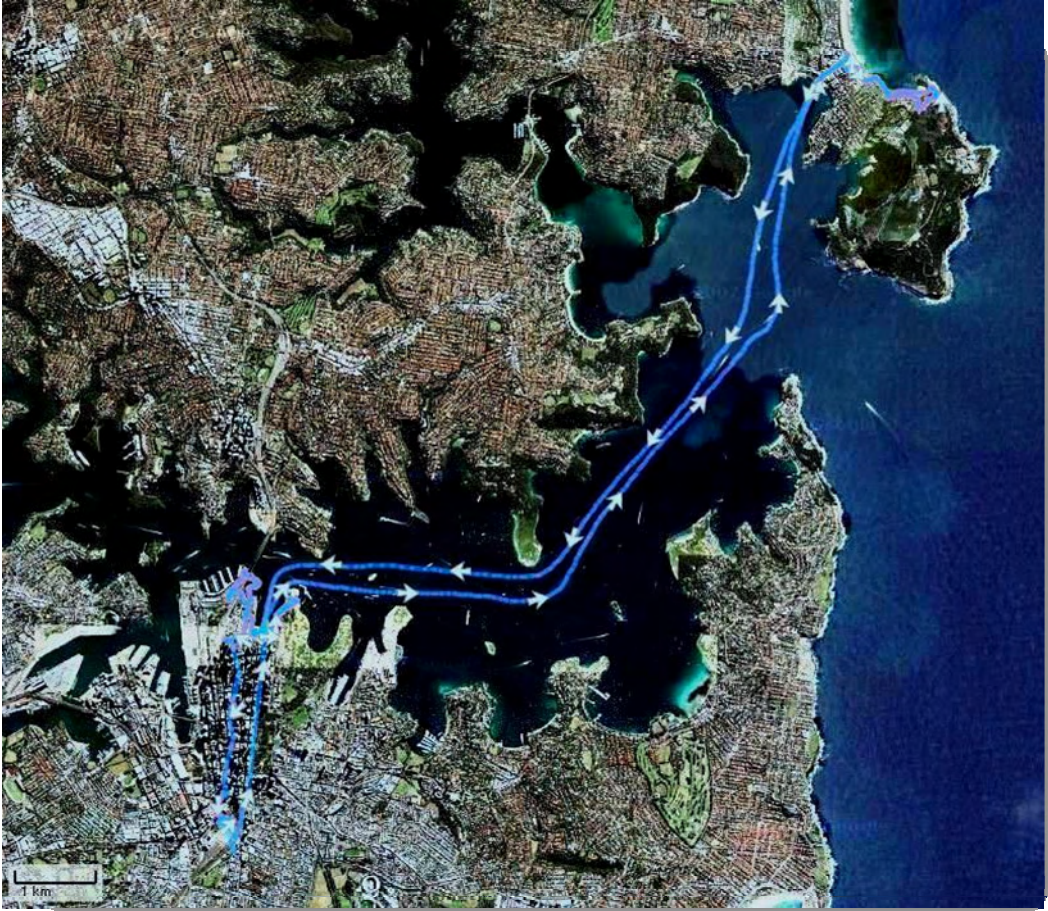
Image 5: Spatial Movement Within The City Core

The majority of people were 'on foot' so they were in fact looking for things to do between visits to attractions and sites. Therefore, while respondents had specific attractions in mind and the trails were somewhat process orientated they would explore places between sites. Image 6 represents such a trail. The Opera House was an initial focus, however these visitors explored the path there and back taking images of local architecture as they went. They were also one of many participants who said that wayfinding was difficult and they would like more signage that would indicate how to find places of interest, activities and things to do.

Image 6: Site Specific Visitation With Random Exploration Between

Random exploration has the opportunity of leading the tourist 'somewhere' and tourists hope that 'somewhere' is interesting. In Image 7 participants, who were staying at Sydney Central YHA, began their day by wandering around China Town, Darling Harbour across the bridge and into North Sydney. However it was a very hot day so to avoid the heat they got on the tram not really knowing where they were heading but hoping it would be 'somewhere interesting'. The tram took them to Glebe. Glebe is an attractive inner city suburb west of Sydney CBD. It has a variety of cafes, restaurants, accommodation venues and a renowned weekend market. Unfortunately the participants did not alight at the station as they 'didn't think Glebe was interesting'. In actuality they are saying that there were no markers at the station to indicate that this is a place of interest.

Image 7: Chance Encounters
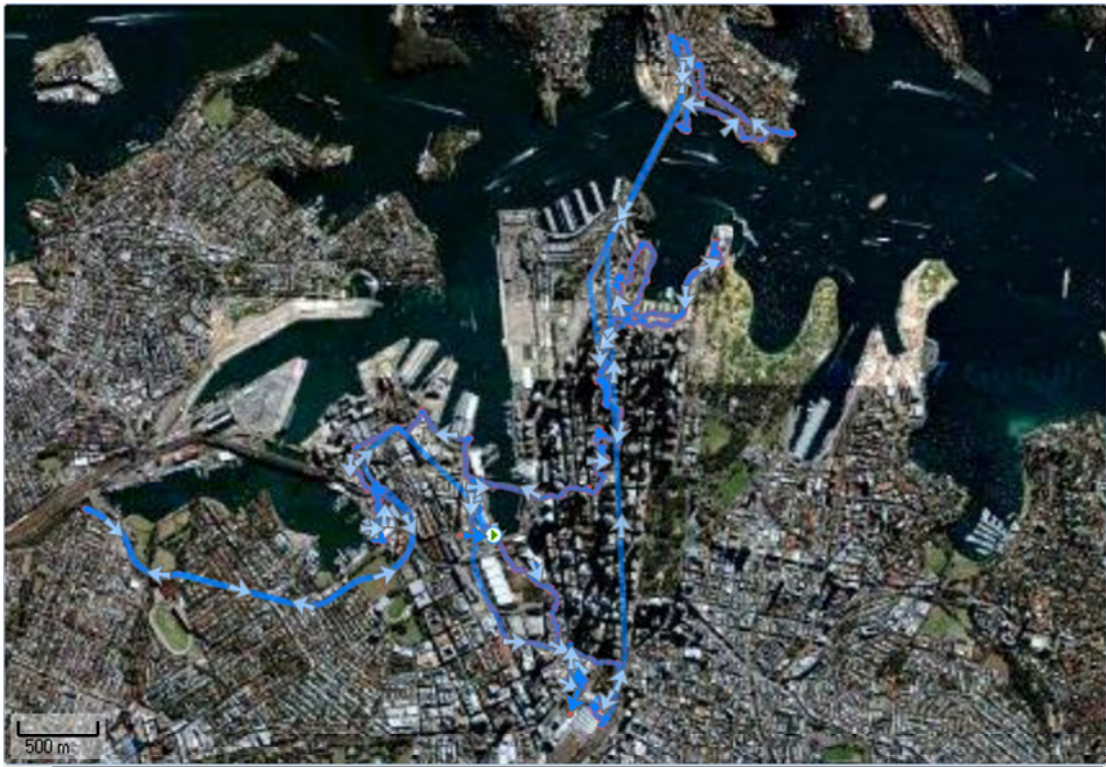
Where visitors moved outside of the CBD they usually did so to visit a particular tourist attraction, for example, Manly, Palm Beach (Image 8), Taronga Park Zoo, Sydney Olympic Park, or 'a trip up the river'. These paths were dictated by major transport routes such as the ferry and major roads. The circular route in Image 8 was unintentional as this group wanted to travel by car to Palm Beach via the coast in both directions but 'got lost' after the leaving the Harbour Bridge.

Visitors losing their way can be advantageous for a destination if it forces people to experience other parts of a destination that they would not have planned to visit. However from the visitors' perspective it can be a frustrating disruption to their day.

Image 8: Moving outside the CBD
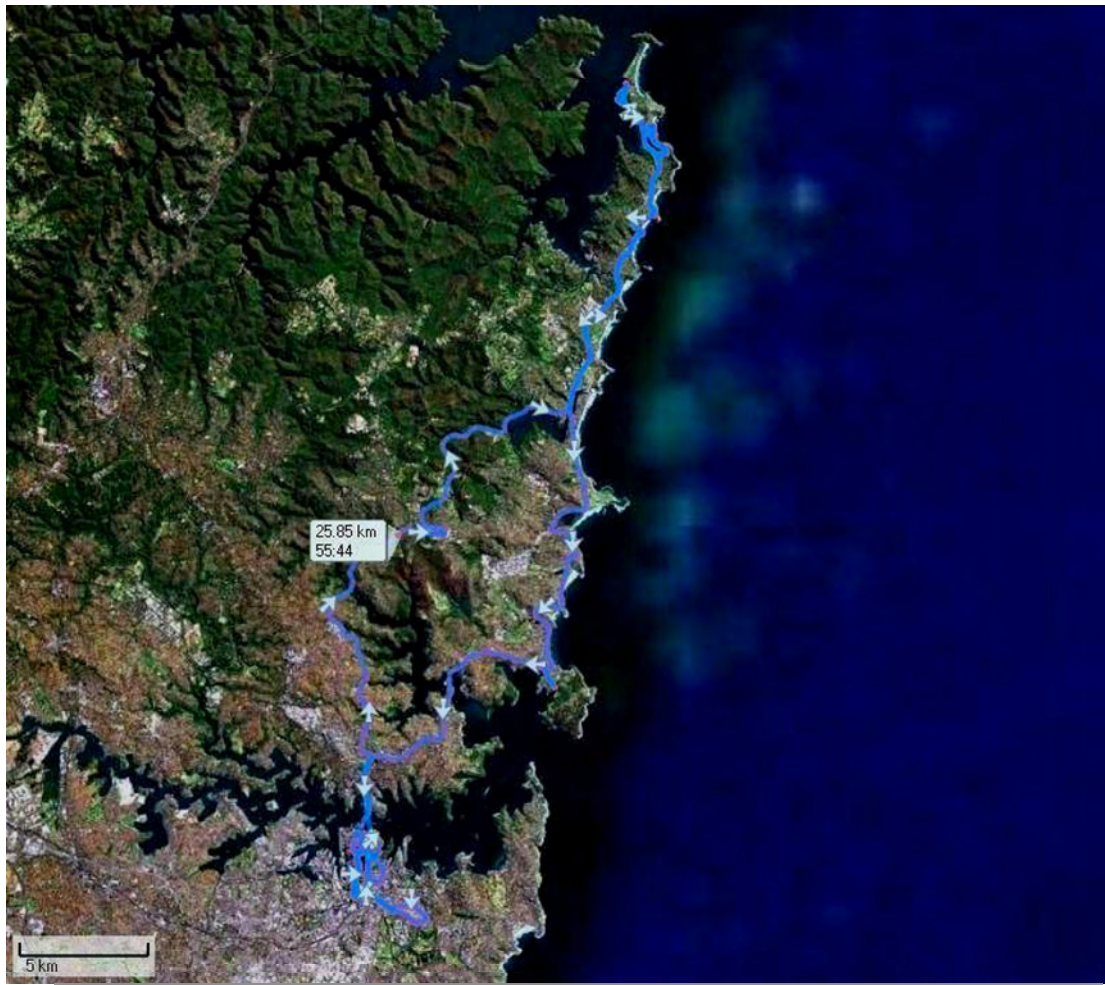
The choice of which ferry to catch was sometimes a question of convenience rather than directness, for example a group returned to Circular Quay from Taronga Zoo via Watsons Bay 'because it was the next ferry' and they did not have anywhere they specifically they wanted to be. In this situation a trip of convenience provided the group the opportunity to experience more of the harbour than they otherwise would.

Where tourists visit suburban centres like Bondi Junction, it is for the purposes of shopping. Characteristically they are repeat visitors who have a familiarity with Sydney's transport networks and with outlying shopping precincts (see Image 9).

Image 9: Going further afield
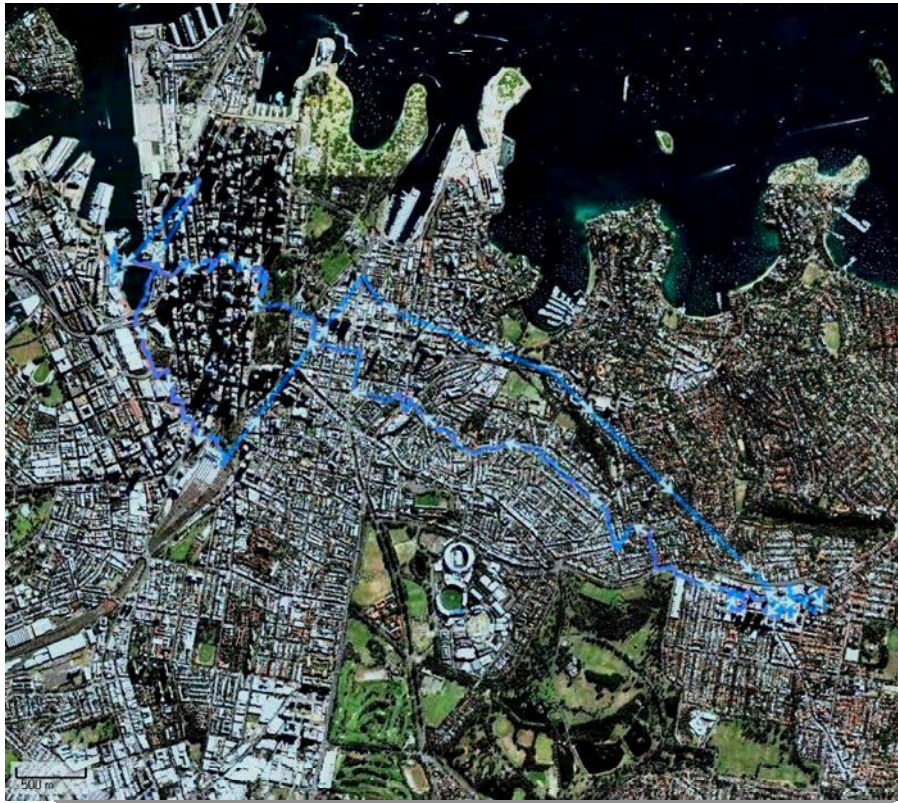
Visitor use of the Botanic Gardens was generally as part of a trip to the Opera House or other tourist attraction (Image 10). Locationally the Botanic Gardens, the Art Gallery of New South Wales and the Australian Museum are within easy walking range of tourists yet the images and subsequent interviews demonstrate that many tourists are not 'finding' their way to this part of the city. For those that do the experience is enjoyable.

Image 10: The Royal Botanic Gardens—Where are they?
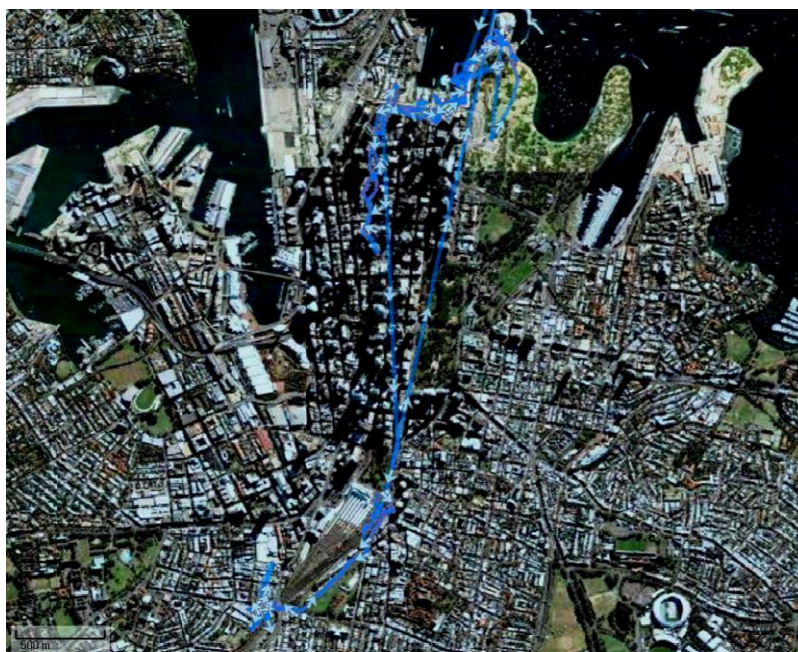
The GPS tracking illuminated a number of issues that present opportunities for improving the experience of visitors to Sydney. Navigating their way through Sydney, participants found elements such as signage, the challenges of public transport and ticketing created difficulties for wayfinding including the location of key cultural attractions.

An efficient transport system enables people to get from A to B however as visitors will walk up to 35 kilometres a day they can be more interested in exploring the fine grain of the city and finding "somewhere else" to go. This 'somewhere else' can be a deeper exploration of the city core or other places of interest within the wider Sydney area. Continued investment in wayfinding can allow people to determine their location within a setting; determine their destination; develop a plan to take them from their location to their destination- including places en-route; spread visitor expenditure; and reduce frustrations.

Successful wayfinding systems lead to satisfactory experiences for visitors. Incorporating a variety of wayfinding elements into a destination is vitally important to these satisfactory experiences. Wayfinding is more than generating a pictorial map of a spatial situation. Wayfinding is decision based behavior (turn right, go up, look for information) in response to an environment (buildings, streets, intersections, stairs, billboards, shops, lighting). Wayfinding is a dynamic cognitive process where movement through spaces requires continuous involvement in reading, interpreting and representing that space. It involves a variety of search process and sources of information. In this respect emergent technologies present new opportunities for agencies to explore innovative wayfinding methods that move away from pictorial maps and static signage to multiple options and direct user interface.

Transport and wayfinding in Sydney were at times compared unfavorably to Melbourne and European cities. Sydney typifies a spatial system which is inward looking, is fragmented with disjointed parts and limited choices for experiencing a greater variety of urban spaces. This type of spatial system tends to facilitate repetitive movements. The Sydney trails indicate a high degree of repetitiveness with participants returning to the same places and using the same routes. City of Sydney's plan to develop multiple villages may go some way to addressing the issues identified from the tracking study.

Canberra

Demographic Profile

In Canberra, 41% of participants were male and 59% were female. Domestic tourists made up 70% of respondents. The majority were travelling with two or more people such as a partner, spouse, children and/or relatives with domestic tourists making up 70% of all participants. The largest proportion was aged 40–59 years of age (57%) and with 57% having visited Canberra previously. The majority of participants used their own car as the major form of transport. Fifty-five percent of respondents were visiting Canberra to sightsee and for general interest, for others it was a holiday (24%). Participants chose Canberra because of the interesting sights they expected to see, the major attractions, to show overseas visitors the Capital, to visit Floriade (which was on during one of the data collection periods) as well as Canberra being 'en route' between Melbourne and Sydney. Floriade is a flower festival held between September and October on the northern shore of Lake Burley Griffin.

Table 4: Canberra Participant Characteristics

Age Group	Main Purpose of Visit
18–19 3%	Sightseeing/General interest 55%
20–29 9%	Holiday 24%
30–39 12%	Visit friends and relatives- 9%
40–49 30%	Business/conference 3%
50–59 27%	Special event/ festival 3%
60–69 15%	Short break 3%
70–79 3%	Medical 3%
Transport used	**Visited before**
Own car 61%	Never - 28%
On foot 27%	Once 15%
Rental car 9%	Couple of times 33%
Bicycle 6%	Many times 24%
Rental car 3%	
Explorer Bus 3%	

Tourist Movements in Canberra

Canberra is a 'driving experience' and can be a challenging city for visitors to navigate which is a result of its decentralised development plan. It is a 'parkland' city where key attractions are linked by major roads which cross extensive areas of open space. The dispersed nature of the city means that visitors perceive walking to attractions as circuitous and time consuming. The major transport options for most visitors visiting Canberra are private vehicle or tour bus.

The locations of Canberra's major attractions are within a 4 kilometre radius of the city centre (Image 11). It is this tight integration that may discourage visitors' choices for experiencing a greater variety of places in Canberra. Predominantly tourist's spatial behaviour remained within this 4 kilometre radius with only two participants venturing further than Canberra Central (Image 1). Participants generally utilised the same roads, streets and patterns of movement. The notable exception to this rule was a visit by one group to Cockington Green which is north-west of the city, but is known to be a popular place to visit for families (Ritchie and Dickson, 2007).

When not visiting a specific attraction, 'viewing from the car' was the most common way in which Canberra was experienced. Similar to Sydney if it is considered desirable to move tourists beyond this 4kilometre zone, then the means of facilitating such visitor movement needs to be identified and implemented, at both macro and micro levels.

Image 11: Geographic Location of Attractions to City Centre
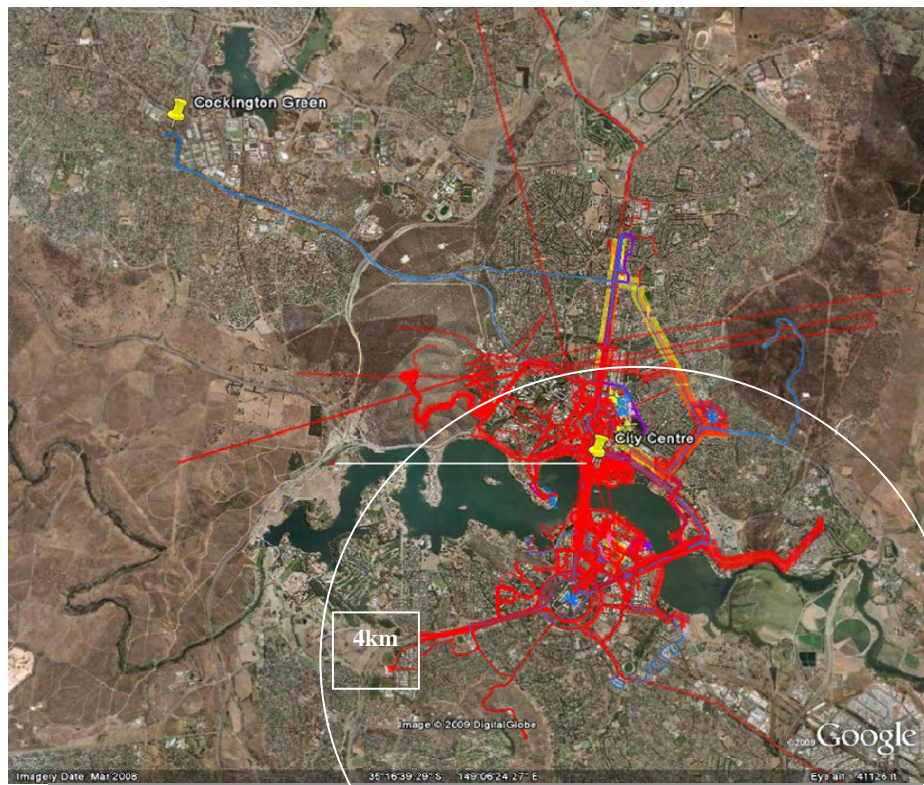
Repetitive touring (travelling along the same path) was uncommon and usually only occurred in the course of visits to sites such as Black Mountain, which has only one access road (Image 12).

Image 12: Repetitive Paths Black Mountain

Tourists typically planned their trips, with circular trails common. Image 13, below, exemplifies a trip, beginning in Barton, which took in sites such as the Australian Defence Force Academy, the Australian War Memorial and the Parliamentary Zone, a sub-section of the Parliamentary Triangle, that is located between Commonwealth Avenue and King's Avenue, from the foreshores of Lake Burley Griffin up to Parliament House. Major thoroughfares included Commonwealth Avenue and Vernon Circle. The trip was planned with specific attractions in mind. The only time people engaged in walking was during a stop at Floriade.

Image 13: Planned Touring
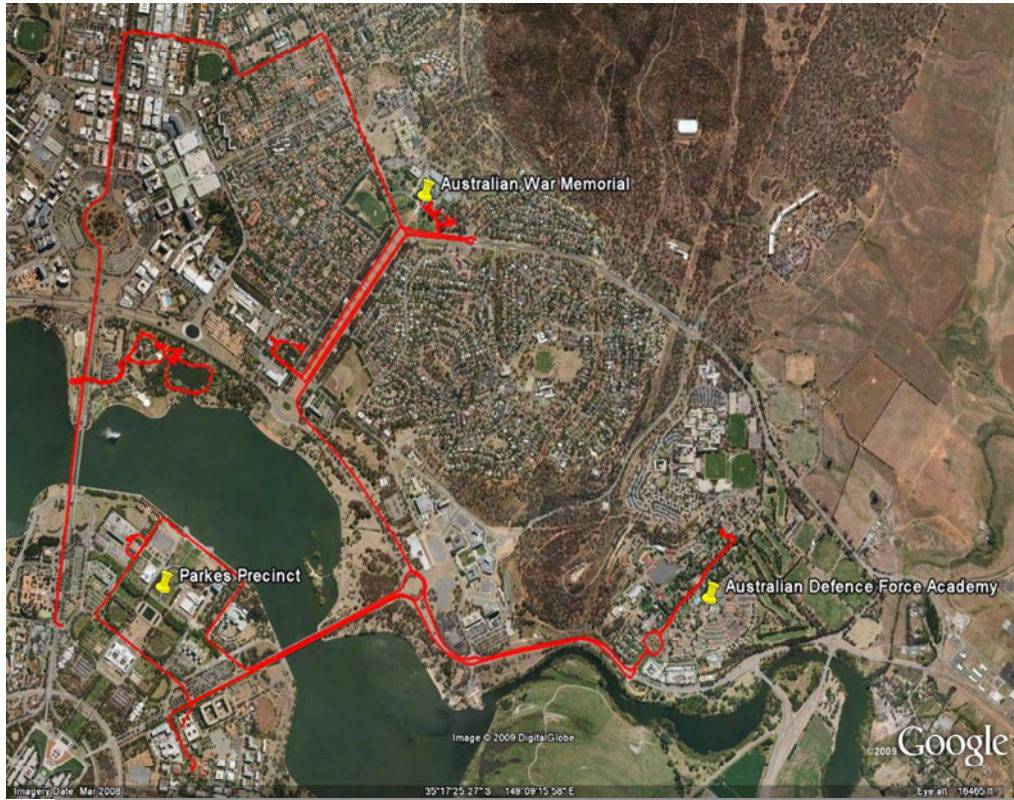
An Australian Case Study

Some Canberra trips ascribe to what Lew and McKercher (2006) refer to as the stem and petal model in which people take a circuitous tour from the main trip. There was also evidence of multiple smaller loops within these trips (Image 14).

Image 14: Stem and Petal Trails

UNDERSTANDING TOURIST 'EXPERIENCES' AND 'BEHAVIOUR' IN CITIES

The geographic focus of many visits was the Parliamentary Zone on the southern shores of Lake Burley Griffin. This area contains major attractions such as the High Court of Australia, the National Gallery of Australia, the National Library of Australia, the National Science and Technology Centre (Questacon), Old Parliament House, the Portrait Gallery, the National Archives of Australia, and Parliament House at its apex.

No visitors circumnavigated Lake Burley Griffin. In spite of numerous attractive cycle ways around the whole lake area, visitors only used these paths to access sites such as the Canberra Visitors Centre and the National Museum of Australia. Floriade provided a stimulus for tourists to walk and engage with Canberra at a micro level. However few people would walk to Floriade from their accommodation (Image 15).

Image 15: Floriade Spatial Behaviour
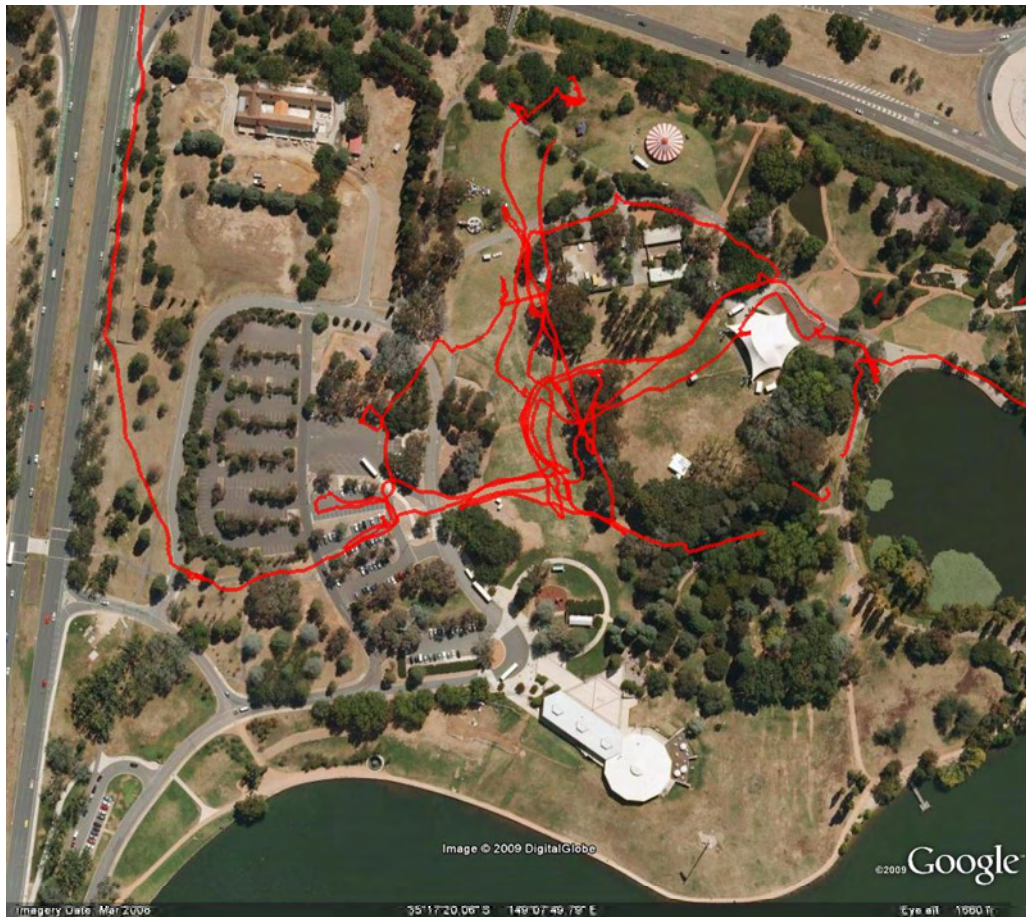
Problems encountered by the tourists in the tracking study when navigating Canberra included:
- Limited information on bus timetables in relation to pick up locations, destinations;
- Finding their way out of London Circuit (a hexagonal road adjacent to the city centre which had to be negotiated to cross the lake and reach the Parliamentary Triangle);
- Difficulty finding streets they were looking for and having the feeling that they were driving around in circles, in part a function of the many roundabouts in the city;
- Road directions were not clear and in some instances roadwork resulted in road closures but with no alternative routes signposted;
- Services such as petrol stations and shopping centres were difficult to locate, especially when tourists only wanted to purchase some milk or bread. Participants felt that the provision of maps which indicated specific types of precincts and services—shopping, supermarkets, restaurants, petrol stations, would solve this problem;
- Those who walked felt that there were not enough 'sightseeing' signs to indicate where their exploration of the city could take them;

- Access to a detailed reference map that included street references was difficult to find and some suggested that these should be available at all hotels;
- Footpaths would often came to an end with tourists finding that they had nowhere to cross the road;
- The couple of tourists who made use of the Explorer Bus were disappointed with the service as they found that it only stopped at two attractions (as opposed to the several it promoted); and
- Participants felt there was not enough free parking, that they were always putting their hands in their pockets.

Tourist spatial behaviour indicates that there is a clear emphasis on the use of private vehicles and a disinclination to experience Canberra by cycle or foot. Canberra has a number of cycle paths around the city and between major attractions however few visitors used these paths for either cycling or walking. Canberra can experience very high temperatures in the summer which can force people into more comfortable modes of travel. Yet just over half the trails were collected during late September when the temperature was a comfortable 24 degrees Celsius.

There may be a number of reasons why tourists prefer vehicular transport to move around Canberra even though Canberra's spatial design and infrastructure are supportive of walking. They may 'perceive' the attractions as being too far apart to navigate 'by foot'. Participants frequently commented that a couple of days 'wasn't enough' time to see all the attractions. Tourists may lack awareness of the availability of bike hire and bike storage opportunities. Only 15% of participants were aware of the Aussie Icons Trail Map (a map of Canberra created as part of Floriade) and none of them were influenced by the map. Predominantly tourists are guided by and use the map that is provided free of charge at the accommodation venue in which they are staying. The length of stay at major attractions, which may be up to four hours (Ritchie & Dickson 2007), may impact upon visitors' willingness to add further effort to their day by walking back to their hotel or to the next attraction. Finally, because tourists try to see all the major attractions during their visit they may feel an urgency to move between attractions as quickly as possible.

Expectations, Importance and Performance Analysis of Sydney

Sydney Respondent Characteristics

One thousand and eighteen useable responses were completed by visitors to Sydney but not all respondents addressed all the demographic questions. As such the demographic data that are presented in Table 5 only include the respondents who chose to answer that question. It can be seen that of the 921 respondents who indicated their gender, 59% were female and 41% were male. From the 925 respondents who indicated their age range, the most prominent age groups in the Sydney sample were 25–34 years (25% of respondents) and 45–54 years (20% of respondents). Thirty-seven percent of respondents (n = 918) indicated that they have a postgraduate degree, while 29.4% had an undergraduate degree. The majority of respondents (64.8%, n=923) were international visitors, with the most common countries of origin being the United Kingdom and the United States of America. The largest proportion of domestic respondents, 25.7%, came from within New South Wales, followed by Victoria (19%), Queensland (18%), South Australia (13%) and Western Australia (11%).

Table 5: Demographic Characteristics of the Sample

Gender (n = 921)	
Male	41%
Female	59%
Age (n = 925)	
18-24	11.4%
25-34	25.0%
35-44	17.8%
45-54	20.0%
55-64	19.0%
65-74	5.6%
75-84	1.0%
85+	.2%

Highest Education Attained (n = 918)	
Primary school	.3%
High school	14.3%
Technical/Trade qualification	17.2%
Undergraduate degree	29.4%
Postgraduate degree	36.5%
TAFE/Private college/Diploma	2.3%
Origin of Visitor (n = 923)	
International	64.8%
Domestic	35.2%
Postcode (n = 324*) *** Note: Domestic visitors only**	
ACT	7.2%
NSW	25.7%
QLD	17.9%
SA	13.2%
NT	1.6%
WA	11.0%
TAS	4.1%
VIC	19.4%
Country of Origin (n = 598) *** Overseas visitor only**	
United Kingdom	25.3%
United States of America	12.8%
New Zealand	9.9%
Germany	7.7%
Canada	6.8%

Sydney Trip Characteristics

Table 6 presents the trip characteristics of respondents and 'n' represents the total number of respondents that answered each question. There was a fairly even split between first time and repeat visitors to Sydney (49% to 51% respectively) with a total mean number of visits of 1.9. The majority of respondents were staying more than one day with some 42% of respondents staying 2–4 days and another 24% staying 5–7 days. Just over half of respondents made the decision to visit Sydney 1–6 months prior to their arrival which indicates that for these respondents a trip to Sydney may be well planned. The average number of people in a travel party was two. A high proportion of visitors stayed in hotel accommodation (45%) and travelled with a partner or spouse (45%). The main purpose of visit was holiday (59%), followed by visiting friends and relatives (17%).

Table 6: Trip Characteristics

Length of Visit to Sydney (n= 1015)	
Less than 1 day	2.6%
1 day	4.4%
2−4 days	41.9%
5−7 days	24.4%
8−10 days	9.6%
11−13 days	3.6%
14 or more days	13.5%
Accommodation (n = 1010)	
Hotel	45.2%
Apartment/Service Apartment	17.0%
Home of friends/relatives	17.0%
Backpacker/Hostel	10.0%
Motel	3.1%
Bed & breakfast	2.3%
None/Day visit	1.7%
Caravan park	1.4%
Share accommodation	0.8%
Host/Homestay	0.6%
Other	0.9%

Travel Companion (n = 1016)	
Travelling alone	18.10%
Partner/Spouse	44.30%
Immediate family	17.30%
Other family members	2.30%
Friends	10.00%
Family & friends	3.40%
Business colleague/s	2.80%
Student group	1.80%
Decision to Visit (n = 1010)	
Less than 1 week prior to your visit	6.1%
More than 1 week, less than 1 month prior to your visit	14.5%
1−6 months prior to visit	51.1%
7−12 months prior to visit	20.3%
More than 12 months prior to visit	8.1%
Main purpose of visit (n = 1014)	
Holiday	59.4%
Visiting friends & relatives	17.2%
Education/Study	5.6%
Business	6.5%
Conference or convention	3.6%
Just passing through	3.2%
Specific attraction/event	3.4%
Other	1.2%

Sources of Information

Respondents were asked to indicate what sources were used to obtain this information and their responses are listed in Table 7. Table 7 illustrates that the top five areas of information sought were accommodation options (73%), specific activities and attractions (72%), the weather (57%), transport and schedules (51%) and prices (42%).

Table 7: Subject of Pre-visit Information Gathering

Sources of Information	N	Percent of Responses*
Accommodation	700	72.8%
Activities and attractions	690	71.7%
Weather/climate	546	56.8%
Transport/schedules	493	51.2%
Prices	399	41.5%
People/culture	198	20.6%
Geography	149	15.5%
Food/ shops	8	.8%
Other	7	.7%

*Multiple responses allowed

UNDERSTANDING TOURIST 'EXPERIENCES' AND 'BEHAVIOUR' IN CITIES

Visitors to Sydney were asked to indicate what sources were used to obtain this information and their responses are listed in Table 7. The Internet was the most common source of information (77%) followed by travel books, guides or brochures (54%), experiences of family and friends (44%) and 32% who also used their own past experiences.

Table 8: Most Commonly Used Sources of Information for a Visit to Sydney

Source of Information	No of Responses*	Percentage of responses
Internet	787	77.3%
Travel book, travel guide or brochure	545	53.5%
Word of mouth family and friends	449	44.4%
Past experiences	323	31.7%
Tourist Office or Visitor Information Centre	243	12.4%
Word of mouth other travellers	191	18.8%
Travel articles or documentaires (e.g.TV program, news paper articles, magazine article, etc.)	142	13.9%
Tour company or tour operator	126	12.4%
Advertising (such as TV ads, magazine ads, posters, etc)	86	8.4%
NONE—did not consult any information	16	1.6%
Hotel	1	.1%

*Multiple responses allowed

Cross tabulation was undertaken to compare the sources of information used by international and domestic visitors (Table 9). Most common sources of information used by domestic visitors were the Internet (34%), past experiences (55.4%), word of mouth from friends and family (38.2) and travel book, guides or brochures (27.7). Overall international visitors sought more information from a variety of sources than domestic visitors. Similarly the Internet (86.3%) was the most important source of information for international visitors. But international visitors also had a higher propensity to seek information from travel books, guides and brochures (75.6%) and their family and friends (54.3%). Tourist office, information centres (29.9%) and word of mouth from other travellers played a more important role as sources of information at the destination for international respondents than they did for domestic tourists.

Table 9: Comparison of Sources of Information for International and Domestic Tourists

Source of Information	Usage Amongst Sydney Domestic Visitors (n = 325)	Usage Amongst Sydney International Visitors (n=598)
Internet	82.2%	86.3%
Travel book, travel guide or brochure	27.70%	75.6%
Word of mouth family and friends	38.20%	54.3%
Past experiences	55.40%	23.6%
Tourist Office or Visitor Information Centre	19.7%	29.9%
Word of mouth other travellers	9.20%	26.9%
Travel articles or documentaires (e.g.TV program, newspaper articles, magazine article, etc.)	9.20%	18.4%
Tour company or tour operator	4.00%	18.9%
Advertising (such as TV ads, magazine ads, posters, etc)	14%	6.7%
NONE—did not consult any information	3.40%	0.8%

Attractions Visited

In Sydney the most popular activities for visitors were visiting iconic sites such as Darling Harbour, Circular Quay, the Opera House, the Rocks and the Harbour Bridge. After these five sites there was a significant drop in attendance at all other sites in Sydney. Interestingly while Darling Harbour itself was visited by 82.5% of respondents, the Aquarium and other sites within the Darling Harbour precinct were visited by 29.7% of visitors or less. This may indicate that Darling Harbour is viewed by respondents as a tourism destination in its own right. Other sites that were visited by multiple respondents included: the Blue Mountains, Hunter Valley, Chinatown, Chinese Gardens, St Mary's and St Andrews Cathedral and Hyde Park Barracks.

Cross tabulations identified the differences in activities undertaken by international versus domestic tourists to Sydney (Table 10). International tourists made more specific visits to attractions and sites than did domestic tourists. Domestic tourists are least likely to visit Featherdale Wildlife Park, Botanic Gardens and Parramatta Historic Houses. Darling Harbour, Circular Quay, the Opera House, The Rocks and the Harbour Bridge were the most popular attractions for both domestic and international visitors. The Powerhouse Museum, Bridge Climb and the Australian Maritime Museum are attractions that received a higher proportion of domestic visitors as opposed to international visitors.

In a cross tabulation of attractions by repeat visitation it was found that Darling Harbour, Circular Quay, The Rocks and the Harbour Bridge had the highest proportion of repeat visitors. The only attractions which had a higher proportion of repeat visitors as opposed to first time visitors were the Art Gallery of New South Wales, the Powerhouse Museum and the Maritime Museum (Appendix C).

Table 10: Comparison of Attractions Visited for International and Domestic Tourists

Activities		OSVisitor		Total (n=923)
		No	Yes	
Darling Harbour	Count	238	522	760
	% within activities	31.3%	68.7%	
	% within OSVisitor	73.2%	87.3%	
Circular Quay	Count	240	511	751
	% within activities	32.0%	68.0%	
	% within OSVisitor	73.8%	85.5%	
Opera House	Count	170	512	682
	% within activities	24.9%	75.1%	
	% within OSVisitor	52.3%	85.6%	
Rocks	Count	196	485	681
	% within activities	28.8%	71.2%	
	% within OSVisitor	60.3%	81.1%	
Harbour Bridge	Count	177	488	665
	% within activities	26.6%	73.4%	
	% within OSVisitor	54.5%	81.6%	
Manly	Count	106	322	428
	% within activities	24.8%	75.2%	
	% within OSVisitor	32.6%	53.8%	
Bondi	Count	79	309	388
	% within activities	20.4%	79.6%	
	% within OSVisitor	24.3%	51.7%	
Harbour Cruise	Count	102	212	314
	% within activities	32.5%	67.5%	
	% within OSVisitor	31.4%	35.5%	
Aquarium	Count	76	200	276
	% within activities	27.5%	72.5%	
	% within OSVisitor	23.4%	33.4%	
Maritime Museum	Count	108	137	245
	% within activities	44.1%	55.9%	

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Activities		OSVisitor		Total (n=923)
		No	Yes	
	% within OSVisitor	33.2%	22.9%	
Olympic Park	Count	65	183	248
	% within activities	26.2%	73.8%	
	% within OSVisitor	20.0%	30.6%	
Zoo	Count	76	155	231
	% within activities	32.9%	67.1%	
	% within OSVisitor	23.4%	25.9%	
Other Beach	Count	44	178	222
	% within activities	19.8%	80.2%	
	% within OSVisitor	13.5%	29.8%	
Sydney Tower	Count	59	151	210
	% within activities	28.1%	71.9%	
	% within OSVisitor	18.2%	25.3%	
Visit a National Park	Count	29	172	201
	% within activities	14.4%	85.6%	
	% within OSVisitor	8.9%	28.8%	
Art Gallery of NSW	Count	55	87	142
	% within activities	38.7%	61.3%	
	% within OSVisitor	16.9%	14.5%	
Powerhouse Museum	Count	68	66	134
	% within activities	50.7%	49.3%	
	% within OSVisitor	20.9%	11.0%	
Olympic Park	Count	17	109	126
	% within activities	13.5%	86.5%	
	% within OSVisitor	5.2%	18.2%	
Bridge Climb	Count	47	72	119
	% within activities	39.5%	60.5%	
	% within OSVisitor	14.5%	12.0%	
Wildlife World	Count	19	100	119
	% within activities	16.0%	84.0%	
	% within OSVisitor	5.8%	16.7%	
Museum of Contemporary Art	Count	25	83	108
	% within activities	23.1%	76.9%	
	% within OSVisitor	7.7%	13.9%	
Museum of Sydney	Count	21	68	89
	% within activities	23.6%	76.4%	
	% within OSVisitor	6.5%	11.4%	
Featherdale Wildlife Park	Count	4	71	75
	% within activities	5.3%	94.7%	
	% within OSVisitor	1.2%	11.9%	
Botanic Gardens	Count	9	47	56
	% within activities	16.1%	83.9%	
	% within OSVisitor	2.8%	7.9%	
Parramatta Historic Houses	Count	3	30	33
	% within activities	9.1%	90.9%	
	% within OSVisitor	.9%	5.0%	
Other	Count	75	108	183
	% within activities	41.0%	59.0%	
	% within OSVisitor	23.1%	18.1%	

How is Sydney Performing?

Expectations are key determinants of customers consumption experiences, satisfaction, and repeat purchase (Van Raaij & Francken 1984; Pizam & Milman 1993; Zeithaml, Berry, et al. 1993; Decrop 2000; Howat & Crilley 2007). The 39 attributes of the urban destination environment listed previously were selected for expectation–importance–performance comparison. The attributes were grouped under five broad categories: 'city environment', 'city experience', 'range of attractions' and 'food services'. Respondents were asked their expectations of the attributes, how important the attributes were to the enjoyment of their visit and how they would rate their satisfaction with their experience of the attributes.

Table 11 presents the total mean scores for international and domestic tourists across the five categories. The mean expectation scores were lower than importance and performance scores for all five categories.

Table 11: Mean scores for Sydney urban destination attributes

	Expectation		Importance		Performance	
Categories	**Int'**	**Dom'**	**Int'**	**Dom'**	**Int'**	**Dom'**
City environment	6.5	6.2	6.9	6.7	7.7	7.5
City experience	6.8	5.8	7.1	6.4	7.7	7.4
Range of attractions	6.8	7.2	7.0	7.3	7.6	8.1
Services	7.5	7.6	8.3	8.4	7.9	8.0
Food services	7.3	7.4	7.9	8.3	7.9	7.8
a Higher scores indicate higher levels for each variable; b Scale Range 1–10 for each item. * Mean difference is significant at the .05 level						

A comparison of international and domestic tourists was conducted to see if there were any differences in their expectations, importance and performance ratings across the 39 attributes. An alpha level of .05 was used for all statistical tests and r was calculated as the effect size (Rosenthal 1991). It was found that there was a significant difference between international and domestic tourists on their perceptions of expectations, importance and performance in relation to a number of attributes.

For ease of interpretation the specific attributes where there are differences between international and domestic tourists are presented in Appendix D along with their mean, standard deviation and effect size. Effect size explains the strength of the difference between two groups.

Very weak to moderate effect sizes were found between international and domestic tourists' expectations on 22 attributes, ratings of importance on 18 attributes and perceptions of performance on 15 attributes. Moderate effect sizes were found for thirteen attributes in the categories of city environment, city experience and food services, and they are explained in Table 13.

Table 12: Differences between International and Domestic Tourists

Expectations of City Environment

• Sydney would have an old and historic visual appeal
  - was somewhat expected by international respondents
  - was expected by domestic respondents
• Sydney would have a spacious urban environment
  - was neither somewhat nor expected by international respondents
  - was somewhat expected by domestic respondents
• Sydney would have good weather
  - was expected by domestic respondents
  - international respondents had high expectations

Expectations of City Experience

• expect to meet local people
  - was not expected by domestic respondents
  - was expected by international respondents
• expect local Sydney people to be relaxed
  - was not expected by domestic respondents
  - was expected by international respondents
• expect local people to be friendly and helpful
  - was somewhat expected by domestic respondents
  - was expected by international respondents
• would not encounter any language barriers.
  - was expected by domestic respondents
  - was highly expected by international respondents

Importance of City Experience

• to have the opportunity to experience the local way of life
  - this is important for international respondents
  - domestic respondents neither expect nor don't expect it
• to meet local people
  - this is somewhat important for international respondents
  - it is neither important nor unimportant for domestic respondents
• that Sydney local people are relaxed
  - is somewhat important for domestic respondents
  - is important for international respondents
• that the local people are friendly
  - is important for domestic respondents
  - is very important for international respondents

Importance of Food services

• to find family orientated food services
  - this is somewhat important for international respondents
  - this is important for domestic respondents

The local community is important to international tourists. They have expectations that people in Sydney will be helpful, relaxed and friendly. The performance category of 'range of attractions' had one attribute with a 'large' effect size—unique history and heritage sites. That is domestic tourists considered Sydney to perform better than did international tourists on offering a range of unique history and heritage sites.

Respondents were asked to express their level of satisfaction with their overall visit to Sydney using a five-point scale, where 1 is highly dissatisfied and 10 is highly satisfied. The mean satisfaction response was 8.4, indicating a very high level of overall satisfaction.

An Independent sample T-Test was performed on satisfaction responses in order to determine whether there were any significant differences in satisfaction ratings based on gender. Levene's Test for equality of variances

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has a P-value less than .05 which indicates that satisfaction differed significantly between males and females and that females were more satisfied with their trip than males (Table 13). There was no significance difference in the level of satisfaction between international and domestic tourists.

Table 13: Independent Sample T-Test—Gender And Overall Trip Satisfaction

	Gender	N	Mean	Std. Deviation	Std. Error Mean	Significant at the p<.05 level
Trip Satisfaction	Male	371	8.02	5.75909	.29900	.045
	Female	532	8.55	1.47919	.06413	

Sydney Importance–Performance Analysis

Expectation, importance and performance scores for domestic and international tourists were analysed in accordance with the IPA framework. The mean scores and grid position for the 39 attributes are presented in Appendix E and F. Overall domestic tourists had lower expectation, importance and performance scores compared to international tourists. The simplified table below presents a comparison of the IPA grid positions for international and domestic respondents.

Five attributes with the highest performance scores by domestic respondents included museums and galleries, interesting activities, good to walk around, unique history and easy to find attractions and services. No language barriers, good to walk around, easy to find attractions and services, good availability of food and good availability of tourism information received the highest performance rating by international respondents. The positive news is that Sydney can continue to keep up the good work in each of these areas.

The attributes that received the lowest ratings by domestic respondents were vibrant nightlife, relaxed local people, opportunity to meet local people, spacious urban environment and dense built environment. Although they are low performing attributes when compared to their importance ratings the management of these attributes can be considered a low priority.

Table 14: Comparison of Sydney International and Domestic Respondents IPA Grid position

Key

Concentrate Here	Low Performance/ High Importance
Keep Up The Good Work	High Importance/ High Performance
Low Priority	Low Importance/ Low Performance
Possible Overkill	Low Importance/ High Performance

Item	Domestic Respondents IPA Grid Position	International Respondents IPA Grid Position
City Environment		
Cleanliness	Concentrate Here	Keep Up The Good Work
Dense built environment	Low Priority	Low Priority
Good weather	Possible Overkill	Concentrate Here
Interesting architecture	Possible Overkill	Possible Overkill
Modern/ visual appeal	Possible Overkill	Possible Overkill
Old/ historic visual appeal	Possible Overkill	Low Priority
Spacious urban environment	Low Priority	Low Priority
Variety of recreational spaces	Low Priority	Possible Overkill
City Experience		
A relaxing place to visit	Low Priority	Keep Up The Good Work
Family friendly environment	Low Priority	Possible Overkill
Friendly local people	Low Priority	Keep Up The Good Work

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Item	Domestic Respondents IPA Grid Position	International Respondents IPA Grid Position
Good to walk around	Keep Up The Good Work	Keep Up The Good Work
Helpful local people	Concentrate Here	Keep Up The Good Work
Multicultural experience	Low Priority	Low Priority
No language barriers	Possible Overkill	Keep Up The Good Work
Opportunity to experience local way of life	Low Priority	Low Priority
Opportunity to meet local people	Low Priority	Low Priority
Relaxed local people	Low Priority	Low Priority
Sense of excitement	Low Priority	Low Priority
Vibrant nightlife	Low Priority	Low Priority
Vibrant urban atmosphere	Low Priority	Low Priority
Range of Attractions		
Interesting Activities	Keep Up the Good Work	Keep Up The Good Work
Museums and galleries	Keep Up the Good Work	Possible Overkill
Music and performance	Possible Overkill	Low Priority
Special events	Low Priority	Low Priority
Unique history	Keep Up the Good Work	Low Priority
Services		
Convenient opening hours	Keep Up The Good Work	Concentrate Here
Easy to find attractions and services	Keep Up The Good Work	Keep Up The Good Work
Good availability of tourism information	Keep Up The Good Work	Keep Up The Good Work
Good signage (directions	Keep Up The Good Work	Concentrate Here
Local transport easy to use and understand	Keep Up The Good Work	Keep Up The Good Work
Reasonable priced local transport	Concentrate Here	Concentrate Here
Reliable local transport	Keep Up The Good Work	Keep Up The Good Work
Food Services		
Family oriented	Concentrate Here	Low Priority
Good availability of food	Keep Up The Good Work	Keep Up The Good Work
Good quality	Keep Up The Good Work	Keep Up The Good Work
Good variety of food	Keep Up The Good Work	Keep Up The Good Work
Healthy and fresh	Keep Up The Good Work	Keep Up The Good Work
Reasonable prices	Concentrate Here	Concentrate Here

The most significant findings from a destination management perspective are those which are perceived to be highly important but the performance is below average. The implication is that these are the attributes where improvement is most urgent. The two attributes where Sydney needs to improve its performance for both domestic and international tourists are reasonable priced local transport and reasonable food prices. For domestic tourists Sydney also needs to improve its performance on cleanliness, helpful local people, and providing food venues that are suitable for families.

In catering to international tourists Sydney also needs to focus on providing good signage and opening hours that are convenient for tourists. However it is not possible for managers to exert control over all destination attributes in equal measure such as 'good weather' versus 'cleanliness'. Indeed the expectation score for weather was rated higher than the performance score which suggests that this is more about managing 'managing' tourists' expectations in relation to the type of weather they may experience during a visit to Sydney.

Expectations, Importance and Performance Analysis of Canberra

Canberra Respondent Characteristics

Usable responses were received from 444 visitors to Canberra. However, similar to the Sydney sample, not all respondents chose to address all demographic questions. In the case of the Canberra sample, refusal rates reached up to 28% for some questions. As such the demographic data that is presented in Table 16 only reports the respondents who chose to answer that question.

From these data it can be seen that 61% of the respondents (n = 319) were female. While Canberra attracts a broad range of age groups, 50% of respondents in the sample (n = 322) who indicated their age were in the 35-54. 35.4% of respondents (n = 319) indicated that they have a postgraduate degree, while 32.6% have an undergraduate degree. Somewhat in contrast to the Sydney group, however, only 22% of the Canberra respondents (n = 326) were from overseas, with half of these coming from the United Kingdom and United States of America. The domestic respondents who indicated their state of origin came from New South Wales (44%), Victoria (25%), Queensland (11%) and South Australia (9%).

Table 15: Demographic Characteristics of the Canberra Sample

Gender (n = 319)		Origin of Visitor (n = 326)	
Male	39.0%	International	21.5%
Female	61.0%	Domestic	78.5%
Age (n = 322)		**State/Territory of Origin (n = 255*)** *Domestic visitors only*	
18–24	5.0%	ACT	2.4%
25–34	15.8%	NSW	43.9%
35–44	26.4%	QLD	10.6%
45–54	23.9%	SA	9.%
55–64	18.9%	NT	0.8%
65–74	9.%	WA	7.5%
75–84	0.9%	TAS	1.2%
Highest Education Attained (n = 443)		VIC	24.7%
Primary school	0.6%	**Country of Origin*** *Note: Overseas visitors only*	
High school	15.%	USA	25.0%
Technical/Trade qualification	13.5%	UK	25.0%
Undergraduate degree	32.6%	New Zealand	10.3%
Postgraduate degree	35.4%	Canada	8.8%
TAFE/Private college/Diploma	2.8%	The Netherlands	4.4%
		Germany	4.4%

Canberra Trip Characteristics

Table 17 presents the trip characteristics of respondents to Canberra and 'n' represents the total number of respondents that answered each question. Amongst the survey sample Canberra had more repeat visitors than Sydney, with some 75% of respondents having visited the area on more than one occasion. The mean number of all trips respondents had made to Canberra was 3.3. The majority of respondents stayed more than one day with 58% of respondents staying 2–4 days and a further 16% staying 5–7 days. Sixty-four percent of respondents visited Canberra with their spouse/ partner or immediate family. This may be connected to the fact that 31% of respondents stayed with friends/relatives whilst in Canberra. 44% of respondents were visiting Canberra for a holiday and there was an average of four people in the travel party. Thirty-seven percent of respondents planned their trip to Canberra less than one month prior to their visit, while over half of respondents made the decision to visit Canberra 1–6 months prior to arrival.

UNDERSTANDING TOURIST 'EXPERIENCES' AND 'BEHAVIOUR' IN CITIES

Table 16: Trip Characteristics

Length of Visit to Canberra (n= 403)	
Less than 1 day	2.7%
1 day	6.9%
2-4 days	57.8%
5-7 days	15.9%
8-10 days	5.2%
11-13 days	0.7%
14 or more days	10.7%
Accommodation (n = 396)	
Home of friends/relatives	30.6%
Hotel	23.5%
Motel	14.6%
Apartment/serviced apartment	12.1%
Caravan park	9.3%
Backpacker/Hostel	4.5%
None/Day visit	3.5%
Bed & breakfast	0.8%
Other	0.3%
Travel Companion (n = 399)	
Travelling alone	13.0%
Partner/Spouse	38.6%
Immediate family	25.1%
Other family members	4.3%
Friends	6.5%
Family & friends	6.8%
Organised group	3.0%
Business colleague/s	1.8%
Student group	1.0%

Decision to Visit (n = 385)	
Less than 1 week prior to your visit	10.1%
More than 1 week, less than 1 month prior to your visit	27.3%
1–6 months prior to visit	52.5%
7–12 months prior to visit	5.7%
More than 12 months prior to visit	4.4%
Main purpose of visit (n =386)	
Holiday	44.3%
Visiting friends & relatives	25.6%
Education/Study	4.9%
Business	9.8%
Conference or convention	4.1%
Just passing through	3.6%
Specific attraction/event	6.5%
Other	1.0%

Sources of Information

To help with the planning of their trip 65% of respondents sought out information on accommodation options before visiting Canberra with 55% of respondents gathered information specifically related to Canberra activities and attractions. That only 6% and 5% of visitors respectively sought information on people/culture and geography can be explained by the low numbers of first time tourists and high numbers of domestic tourists in the response sample.

Table 17: Subject of Pre-visit Information Gathering

Source of Information	N	Percentage of Respondents
Accommodation	205	64.5%
Activities and attractions	176	55.3%

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Weather/climate	101	31.8%
Prices	83	26.1%
Transport/schedules	62	19.5%
People/culture	18	5.7%
Geography	16	5.0%

Reflective of the greater concentration of domestic tourists within the sample only three people identified themselves as using tour companies or operators to plan their trip to Canberra. One hundred and seventeen respondents indicated that they used the Internet to source information on Canberra, with 68 relying on family and friends.

Table 18: Most Commonly Used Sources of Information for a Visit to Canberra

Source of Information	Percentage of Canberra Domestic Visitors (n = 70)	Percentage of Canberra International Visitors (n=256)
Internet	74.2	75.7
Travel book, travel guide or brochure	27.0	61.4
Word of mouth family and friends	45.3	68.6
Past experiences	53.5	21.4
Tourist Office or Visitor Information Centre	23.0	21.4
Word of mouth other travellers	8.2	14.3
Travel articles or documentaries (e.g.. TV program, newspaper articles, magazine article, etc.)	9.4	8.6
Tour company or tour operator	2.7	5.7
Advertising (such as TV ads, magazine ads, posters, etc)	7.0	2.9
NONE—did not consult any information	3.1	0.0

* Respondents could nominate multiple sources of information.

Attractions Visited

The most popular activities for tourists in Canberra were centred on iconic sites such as the Australian War Memorial and the new and old Parliament Houses. These sites were visited by 61%, 43% and 36% of the response group respectively. This is in contrast to previous research by Ritchie and Dickson (2007). The significant cultural institutions, the National Museum and Gallery, were each visited by nearly a third of respondents.

Cross tabulations identified the differences in activities undertaken by international versus domestic tourists to Canberra (Table 19). The high proportion of domestic visitors to international respondents means that the row percentage will virtually always record a higher domestic result. A higher proportion of international respondents visited the Botanic Gardens, the Australian War Memorial and Reptile Centre. A higher proportion of domestic respondents visited Cockington Green, CSIRO and the National Film and Sound Archive.

Table 19: Comparison of Attractions Visited for International and Domestic Tourists

Activities		Overseas Visitor		Total (n=371)
		No	Yes	
Australian War Memorial	Count	176	51	227
	% within attract	77.5%	22.5%	
	% within OSVisitor	71.8%	72.9%	
Parliament House	Count	123	38	161
	% within attract	76.4%	23.6%	

Activities		Overseas Visitor		Total
		No	Yes	(n=371)
	% within OSVisitor	50.2%	54.3%	
Old Parliament House	Count	101	33	134
	% within attract	75.4%	24.6%	
	% within OSVisitor	41.2%	47.1%	
National Museum of Australia	Count	86	34	120
	% within attract	71.7%	28.3%	
	% within OSVisitor	35.1%	48.6%	
National Gallery of Australia	Count	88	25	113
	% within attract	77.9%	22.1%	
	% within OSVisitor	35.9%	35.7%	
Black Mountain	Count	88	20	108
	% within attract	81.5%	18.5%	
	% within First_vis	35.9%	28.6%	
Questacon	Count	87	10	97
	% within attract	89.7%	10.3%	
	% within OSVisitor	35.5%	14.3%	
Botanic Gardens	Count	62	23	85
	% within attract	72.9%	27.1%	
	% within OSVisitor	25.3%	32.9%	
Royal Australian Mint	Count	55	6	61
	% within attract	90.2%	9.8%	
	% within OSVisitor	22.4%	8.6%	
Australian Institute of Sport	Count	37	9	46
	% within attract	80.4%	19.6%	
	% within OSVisitor	15.1%	12.9%	
National Library of Australia	Count	34	11	45
	% within attract	75.6%	24.4%	
	% within OSVisitor	13.9%	15.7%	
Cockington Green Gardens	Count	37	6	43
	% within attract	86.0%	14.0%	
	% within OSVisitor	15.1%	8.6%	
National Portrait Gallery	Count	31	8	39
	% within attract	79.5%	20.5%	
	% within OSVisitor	12.7%	11.4%	
National Carillion	Count	27	11	38
	% within attract	71.1%	28.9%	
	% within OSVisitor	11.0%	15.7%	
High Court	Count	25	9	34
	% within attract	73.5%	26.5%	
	% within OSVisitor	10.2%	12.9%	
Deep Space Communications Complex	Count	24	9	33
	% within attract	72.7%	27.3%	
	% within OSVisitor	9.8%	12.9%	
National Capital Exhibition	Count	22	8	30
	% within attract	73.3%	26.7%	
	% within OSVisitor	9.0%	11.4%	
Tidbinbilla Nature Reserve	Count	15	14	29
	% within attract	51.7%	48.3%	
	% within OSVisitor	6.1%	20.0%	
National Zoo and Aquarium	Count	22	6	28
	% within attract	78.6%	21.4%	
	% within OSVisitor	9.0%	8.6%	

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Activities		Overseas Visitor		Total (n=371)
		No	Yes	
National Film and Sound Archive	Count	19	3	22
	% within attract	86.4%	13.6%	
	% within OSVisitor	7.8%	4.3%	
CSIRO	Count	20	1	21
	% within attract	95.2%	4.8%	
	% within OSVisitor	8.2%	1.4%	
Floriade	Count	15	1	16
	% within attract	93.8%	6.3%	
	% within OSVisitor	6.1%	1.4%	
Reptile Centre	Count	7	5	12
	% within attract	58.3%	41.7%	
	% within OSVisitor	2.9%	7.1%	
Lanyon Homestead	Count	6	4	10
	% within attract	60.0%	40.0%	
	% within OSVisitor	2.4%	5.7%	
Railway Museum	Count	5	2	7
	% within attract	71.4%	28.6%	
	% within OSVisitor	2.0%	2.9%	
Other	Count	15	5	20
	% within attract	75.0%	25.0%	
	% within OSVisitor	6.1%	7.1%	

*Total number of visits made by respondents to different sites in and around Canberra. [#]Multiple responses allowed

In a cross tabulation of attractions by repeat visitation it was found that the Australian War Memorial was the most popular attraction for both repeat and first time respondents. Attractions where the percentage of first time users was higher than the percentage of repeat users included: Parliament House and the National Museum of Australia. Black Mountain, Questacon, Royal Australian Mint, the National Carillion, Floriade, CSIRO and the Australian Institute of Sport attracted a higher proportion of repeat visitors than first time visitors (Appendix G).

How is Canberra Performing?

The 39 attributes of the urban destination environment listed previously were selected for expectation–importance–performance comparison in Canberra. Again the 39 attributes were grouped under five broad categories: 'city environment', 'city experience', 'range of attractions', 'services' and 'food services'. Respondents were asked their expectations of the attributes, how important the attributes were to the enjoyment of their visit and how they would rate their satisfaction with their experience of the attributes.

Table 20 presents the total mean scores for international and domestic tourists visiting Canberra across the five categories: city environment, city experience, range of attractions, services and food services. Similar to Sydney the mean expectation scores were lower than importance and performance scores for all five categories.

Table 20: Total Mean Scores—Expectation, Importance and Performance for Domestic and International Tourists

	Expectation		Importance		Performance	
Categories	Int'l	Dom'	Int'l	Dom'	Int'l	Dom'l
City environment	5.6	5.8	6.6	6.3	7.4	7.3
City experience	5.5	5.0	6.5	5.8	7.0	6.9
Range of attractions	6.0	7.0	6.9	7.2	7.3	8.1
Services	6.2	6.2	7.7	7.2	7.0	7.3
Food services	6.8	6.0	7.8	6.8	7.4	7.3
a Higher scores indicate higher levels for each variable; b Scale Range 1−10 for each item * Mean difference is significant at the .05 level						

A comparison of international and domestic visitors to Canberra was conducted to see if there were any differences in their expectations, importance and performance ratings across the 39 attributes. Again it was found that there was a difference between international and domestic tourists on their expectations and perceptions of importance and performance in relation to some attributes.

For ease of interpretation the specific attributes on which international and domestic tourists differed are presented in Appendix H along with their mean, standard deviation and effect size. Very weak to moderate effect sizes were found between international and domestic tourists' expectation on 13 attributes, ratings of importance on 13 attributes and perceptions of performance on 6 attributes. Moderate effect sizes were found for 16 attributes in the categories of city environment, city experience, range of attractions and food services, and they are explained in Table 22.

Table 21: Differences between International and Domestic Tourists

Expectations of City Environment
• Canberra has good weather
- somewhat expected by international respondents
- neither expected nor unexpected by domestic respondents
Expectations of City Experience
• to meet local people
- was not expected by domestic respondents
- neither expected nor not expected by international respondents
• that local people in Canberra are relaxed
- was not expected by domestic respondents
- neither expected nor not expected by international respondents
• that local people in Canberra are friendly
- neither expected nor not expected by
- somewhat expected by international respondents
Expectations of Range of Attractions
• Canberra has a range of museums and galleries
- highly expected by domestic respondents
- expected by international respondents
• Canberra has special events
- somewhat expected by domestic respondents
- not expected by international respondents
• Canberra has a range of interesting activities
- somewhat expected by international respondents
- expected by domestic respondents
Importance of City Environment
• Canberra has good weather
- is somewhat important for domestic respondents
- is important for international respondents

Importance of City Experience
• to experience local life
- somewhat not important for domestic respondents
- important for international respondents
• to meet local people
- somewhat not important for domestic respondents
- important for international respondents
• that local people are relaxed
- important for international respondents
- neither important nor unimportant for domestic respondents
• that local people are friendly and helpful
- important for domestic respondents
- very important for international respondents
Importance of Range of Attractions
• there are a range of museums and galleries
- very important for domestic respondents
- important for international respondents
Importance of Services
• local transport is easy to use and understand
- neither important nor unimportant for domestic respondents
- important for international respondents
• local transport is reliable
- neither important nor unimportant for domestic respondents
- important for international respondents
Performance of City Environment
• old and historic visual appeal
- performed well for international respondents
- performed very well for domestic respondents

Respondents were asked to express their level of satisfaction with their overall visit to Canberra, using a ten-point scale where 1 is highly dissatisfied and 10 is highly satisfied. The mean satisfaction level for the response group was 8.1.

An Independent sample T-Test was performed on satisfaction responses in order to determine whether there were any significant differences in satisfaction ratings based on gender and visitor origin. No differences were found in satisfaction between males and females and there was no significant difference in satisfaction between international and domestic respondents.

Canberra Importance–Performance Analysis

Expectation, importance and performance scores for domestic and international tourists to Canberra were also analysed in accordance with the IPA framework. The mean scores and grid position for the 39 attributes are presented in Appendix I and J. Overall domestic tourists had lower expectation, importance and performance scores compared to international tourists. The simplified table below presents a comparison of the IPA grid positions for international and domestic respondents (Table24).

Canberra is either performing well (located in the 'keep up the good work' quadrant) or over performing (located in the 'possible overkill' quadrant) on the majority of attributes. Museums and galleries, no language barriers and unique heritage and history were rated in the top five attributes by both international and domestic respondents. Domestic respondents felt that Canberra had interesting activities and good availability of tourism information. International respondents rated Canberra highly in terms of its cleanliness and having good weather. It is not necessary for Canberra to focus management strategies on these areas as when the performance scores for these attributes were compared to the importance ratings it was found that Canberra can 'keep up the good work'.

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Both domestic and international respondents gave Canberra low performance ratings on sense of excitement, vibrant urban atmosphere, dense built environment and vibrant nightlife. Multicultural experience was rated low by domestic respondents while international respondents rated music and performance low. The good news is that when the performance of these attributes is compared to their importance they are considered as low priority management areas.

Table 22: Comparison of Canberra International and Domestic Respondents IPA Grid position

Key

Concentrate Here	**Low Performance/ High Importance**
Keep Up The Good Work	**High Importance/ High Performance**
Low Priority	**Low Importance/ Low Performance**
Possible Overkill	**Low Importance/ High Performance**

Attribute	Domestic Respondents IPA Grid Position	International Respondents IPA Grid Position
City Environment		
A variety of recreational parks	Possible Overkill	Possible Overkill
Cleanliness	Keep Up The Good Work	Keep Up The Good Work
Dense built environment	Low Priority	Low Priority
Good weather	Low Priority	Keep Up The Good Work
Interesting Architecture	Keep Up The Good Work	Low Priority
Modern/ Visual Appeal	Possible Overkill	Possible Overkill
Old/ historic visual appeal	Concentrate Here	Low Priority
Spacious urban environment	Keep Up The Good Work	Keep Up The Good Work
City Experience		
A relaxing place to visit	Keep Up The Good Work	Keep Up The Good Work
Family friendly environment	Possible Overkill	Low Priority
Friendly local people	Low Priority	Keep Up The Good Work
Good to walk around	Keep Up The Good Work	Concentrate Here
Helpful local people	Concentrate Here	Keep Up The Good Work
Multicultural experience	Low Priority	Keep Up The Good Work
No language barriers	Possible Overkill	Low Priority
Opportunity to experience local way of life	Low Priority	Low Priority
Opportunity to meet local people	Low Priority	Possible Overkill
Relaxed local people	Low Priority	Low Priority
Sense of excitement	Low Priority	Low Priority
Vibrant nightlife	Low Priority	Low Priority
Vibrant urban atmosphere	Low Priority	Possible Overkill
Range of Attractions		
Interesting activities	Keep Up The Good Work	Keep Up the Good Work
Museums and Galleries	Keep Up The Good Work	Keep Up the Good Work
Music and performance	Low Priority	Low Priority
Special events	Possible Overkill	Low Priority
Unique history/ heritage sites	Keep Up The Good Work	Keep Up the Good Work
Services		
Convenient opening hours	Keep Up The Good Work	Concentrate Here
Easy to find attractions and services	Keep Up The Good Work	Keep Up The Good Work

Attribute	Domestic Respondents IPA Grid Position	International Respondents IPA Grid Position
Good availability of tourism information	Keep Up The Good Work	Keep Up The Good Work
Good signage/ directions	Keep Up The Good Work	Concentrate Here
Local transport easy to use and understand	Possible Overkill	Possible Overkill
Reasonable priced local transport	Possible Overkill	Possible Overkill
Reliable local transport	Possible Overkill	Possible Overkill
Food Services		
Family oriented	Keep Up The Good Work	Possible Overkill
Good availability of food	Keep Up The Good Work	Keep Up The Good Work
Good quality	Keep Up The Good Work	Keep Up The Good Work
Good variety of food	Keep Up The Good Work	Keep Up The Good Work
Healthy and fresh	Keep Up The Good Work	Keep Up The Good Work
Reasonable Prices	Concentrate Here	Concentrate Here

Again, the most significant management implications arise where respondents indicate that Canberra performed relatively poorly on highly important attributes. For domestic and international respondents Canberra can improve its performance in having reasonable prices for food. Domestic tourists also felt that Canberra performed relatively poorly in relation to its 'old historic visual appeal', although this is not surprising in a city that is considerably less than one hundred years old. Domestic tourists indicated there was room for improvement in relation to the important attribute of having 'helpful local people'. In satisfying the needs of international tourists Canberra should concentrate on providing 'good signage and directions' and 'convenient opening hours' and making Canberra a good place to walk around.

Segmenting Urban Tourists

To determine if identifiable sub groups exist within tourist populations that visited the two cities Two-step cluster analysis was used to group respondents based on their demographic and trip characteristics. A one-way between group analysis of variance was conducted to explore the effects of demographic, trip type and expectation variables on visitor satisfaction.

Three groups were identified based on a two-step cluster analysis and these were further explored for differences with respect to their expectations and satisfaction with their tourist experiences. Fifteen percent of respondents (n = 209) were eliminated due to missing values. The cluster analysis reflects 1181 visitors or 85 % of respondents.

There was a statistically significant difference at the $p<.05$ level in satisfaction scores for the three cluster groups: $F (2, 1176) = 35.781$, $p = 0.0$. Despite reaching statistical significance the actual difference in mean satisfaction scores between the three clusters was quite small. Post-hoc comparisons using Tukey HSD Test indicated that the mean score for cluster 1 (M = 8.77, SD = 1.29) was significantly different from clusters 2 (M = 7.97, SD = 1.55) and 3 (M = 8.17, SD = 1.58). Clusters 2 and 3 did not differ significantly from each other. The cluster profiles can be found in Appendix K.

The key features that differentiated each cluster were used in naming and interpreting the clusters labeled as Planners, Spontaneous/Repeat Visitors and Discoverers. A summary of the distinguishing features of each cluster profile are listed below:

Planners: (Cluster 1, 41.6% of respondents)
- Has the highest average expectation scores of the three clusters across all categories of destination attributes. All expectation attributes contribute to this cluster.
- Has the highest proportion of females of the three clusters.
- Has the highest proportion of visitors in the 35–64 age group.
- Overall this cluster is more educated than clusters 2 and 3.
- Forty-eight percent of respondents made the decision to visit 7–12 months prior to their trip.

- This cluster believes all sources of information are important especially travel articles or documentaries.
- This cluster has the least number of dissatisfied respondents.

Spontaneous/Repeat Visitors: (Cluster 2, 37.2% of respondents)
- Has the lowest average expectation scores of the three clusters across all categories of destination attributes.
- Has the highest proportion of respondents in the 65–74 age group.
- Has the highest proportion of domestic visitors of the three clusters.
- Has the highest proportion of repeat visitors.
- This cluster undertakes short term planning with the majority of respondents decided to visit between less than one week and less than one month prior to their trip.
- Has a higher proportion of people who are on business, attending a conference or just passing through.
- Majority of respondents are visiting for specific attraction/event purposes.
- Cluster 2 relies on the Internet and their past experiences as their most important sources of information.

Discoverers: (Cluster 3, 25.7% of respondents)
- This cluster has moderate expectations.
- It includes an equal ratio of males to females.
- Has the highest proportion of 18–34 year olds.
- Has the highest proportion of international visitors.
- Has the highest proportion of people who are visiting for the first time.
- More people in this cluster are travelling alone than in Clusters 1 and 2.
- Cluster 3 views travel books, travel guides and brochures as being their most important source of information followed by word of mouth of family and friends and other travellers.

It seems that those who seek information from a variety of sources have higher expectations. Planners (Cluster 1) were more satisfied than Clusters 2 or 3 which may suggest that because this cluster are more informed they have a better understanding of the destination's attributes and the destination is better able to confirm those expectations.

Images

As noted earlier the knowledge gained from understanding the importance of, and meanings given to, the images people capture in a visit can provide an important source of marketing information. In this context marketers could seek to match the types of experiences visitors have expressed through their images with appropriate campaign messages.

However, understanding the meaning intended by the photographer and the meaning the observer draws from images may be different. As outlined in the methodology a two-stage process was used in the interpretation phase. Initially images were analysed on the basis of their specific subject content. Each image was thematically grouped in terms of what we observed in the photographs and our interpretation of the likely focus of the photograph. The comments by the participants about their own images also helped with this classification process.

It is important to acknowledge the participants whose images were analysed for this report. Their discussions and explanations of the context in which the images were collected were crucial to our interpretation. Further, their willingness to permit a significant amount of personal data to be collected, analysed and discussed by the researchers and industry partners of the project provided a richness to the interpretation that may not have otherwise been possible. In the context of their comments, participants requested that they be referred to by their first names.

In Sydney the largest numbers of images were captured of:
- Sydney Harbour (242);
- Darling Harbour (141);
- Sydney Opera House (138);
- Queen Victoria Building (121);
- Harbour Bridge (101); and
- The Sydney Aquarium (81).

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In Canberra the largest numbers of images were captured of:
- The Australian War Memorial (328);
- Floriade (100);
- New Parliament House (99); and
- Old Parliament House (63).
  (A more complete list of images can be found in Appendix M).

However these images only represent the places that tourists visited. The content of the images is more revealing in respect of their meaning. The images suggest that visitors:
- Recreate the visual experience for others by taking multiple scene shots of viewscapes such as the harbour;
- Highlight sites and objects which may be of particular interest to friends and family back home such as historic cars, artwork, war memorabilia and churches;
- Document artwork that they have come across by surprise or were not expecting to see particularly if it is outdoors;
- Reveal what they consider to be beautiful or interesting ranging from a door in a building that leads nowhere, to people sunning themselves in a park, architecture, churches, birds, plants or insects;
- Highlight artifact, objects and items that they find educational such as 3D models, glass blowing, stories of the past, historical information and facts;
- Record what they perceive to be characteristic of 'Sydney' and 'Canberra' such as the Harbour, the Bridge, the Opera House, Parliament House or unusual fauna; and
- Document their group being 'in the experience' such as eating food they haven't tried before or would not normally eat at home, looking out of ferries and buses, waiting for ferries or buses, sleeping, holding small insects, and posing in front of well known attractions.

The experiences captured by these images reflect a wide range of feelings, thoughts and behaviour in participants. In the second phase of the analysis, five interpretive themes were identified. These themes are discussed below using the text of participants.

Learning

Bill, was in Sydney on a study tour and spent a whole day visiting the Australian Museum, the Art Gallery of New South Wales and the Botanic Gardens. Many of the photos he took during the day were of items related to his studies such as skeletons, rocks and plants. For example he took a photograph of an echidna at the museum (Appendix N) and on Flickr he commented 'A monotreme! God damn that's cool!'. He also took a photo of a platypus and described his photo by saying 'Platypus!, Look at the flattened, ovoid opening at the front where the nerves for the electrosensitive beak must emerge—I guess they're cranial nerves? Did they branch and separate from the olfactory nerves? The two senses seem something like akin??, and I can't imagine the thing just grew a new cranial nerve and opening ... I'm so **curious**' Of another photo he said 'I love vertebrae ...' and another he said 'Dogfish! What a bizarre creature. I guess this is both bone and cartilage—I **think** it's a bony fish ...' Bill was learning by applying what he had been taught in his studies, to view real examples in a new context.

In the Botanic Gardens, Bill made a close connection with Sydney's natural environment represented by the 42 images he captured there. The more interest he had in a plant or animal, the more photos he took of it. For example, he took five photos of a Monarch Butterfly on a flower because he thought 'this was about the coolest thing ever. We have Monarch butterflies at home too. Beautiful critters'. He captured six photos of a purple flowered bush (Appendix O) because he thought 'These are just so appealing ...' and he took two photos of a pair of ducks (Appendix P) because they appealed to his curiosity: 'Male and female? Intraspecial variation? Interspecies?'

Miyoko, her husband and two sons visiting from Japan also demonstrated an emphasis on learning during their travels. They visited Elizabeth Bay House and the Powerhouse Museum. At Elizabeth Bay House Miyoko and her husband read, studied and learnt about the various artifacts relating to Australian culture and history. They also took photos of the items they found most interesting, for example a China pot (Appendix Q) and a description of Alexander Macleay (Appendix R). Of the first photograph they commented 'I don't know what this is. Probably it is something to wash hands and face in former days?', and of the second they said 'The Study of Alexander'. After Elizabeth Bay House, they went to the Powerhouse Museum because it offered child-friendly activities. They took a photo which demonstrated this (Appendix S). On Flickr they describe the photo saying 'Entrance at power house, they're very excited to see things in the museum'. Their desire for learning and growth is demonstrated by them taking their children to a museum rather than a fun park.

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City as playground

The city as playground is characterised in images such as the photographs taken by Niek and his friend. The boys are 18–19 years old and on their fourth day in Sydney. Throughout the day they kicked a soccer ball wherever they went: on street corners, parks and community spaces such as Darling Harbour. 'Even if we're at Darling Harbour, we keep playing football. I want to remember that, therefore the photo'. In a sense they were 'playing with the city' itself and they connected with the city by using it as a playing field. When they returned at the end of the day they were full of excitement and exuding a sense of fun: they had had fun with the city.

There was also a form of playfulness in the way participants approached their visual 'task'. For one participant every image he captured, such as people or cars flashing by, were reflections from glass fronted buildings used as photographic backdrops.

Other tourists captured cornices, windows, signposts, specific architectural features, or plants protruding from the side of a building. There is a sense that tourists felt more connected with Sydney depicted by the 'playful' way in which they used the buildings in their images.

Connections

Connection is a strong theme that is evident in many tourist images. The connections are with both family members and with the destination. For families the holiday represents an opportunity to connect with each other and with the place they are visiting. Cyril a male from New Caledonia was in Sydney with his wife and his three children who were aged over 15 years. This was their first time in Sydney and they came here for a holiday.

On their first day in Sydney Cyril, his wife and children explored all the iconic attractions, taking multiple photos of the Harbour Bridge and the Opera House because they believe 'Sydney's opera is so beautiful, that we take a photo each time we can to keep the most beautiful. It is the Australian symbol all around the world'. They commented on a photo taken of the family before their trip on a ferry (Appendix T) 'all the family is ready to do a trip in the bay just for fun', 'a trip in the bay is very pleasant. We can take 1000 photos during this trip' and of the monorail (Appendix U), which they used as a relief from walking 'the facility of the public transport was appreciated by all the family. The monorail is very funny'.

Family connections are represented in the images of Miyoko. Of the 40 photos collected 28 included at least one family member, and in every case at least one of her sons, if not both. The images show the boys interacting with one another. In one photo '[they] are playing and waiting for a bus' (Appendix V), physically connected in combat over a stick, and emotionally connected by the game they play. In another photo they are playing at the Powerhouse Museum (Appendix W). Dressed in orange vests and with what appears to be a train track in the background the children are engaged in an activity while their parents, Miyoko and her husband, watch over them and capture the moment on camera. Sydney's attractions and environment have provided opportunities for the family to play, be themselves, and become physically and emotionally connected to one another during their visit to Sydney.

Miyoko and her family also demonstrate through their images that the activities they participated in assisted them to learn about and connect with aspects of Australia's culture. From their images we can see that they took time to read and deliberate over the artifacts they saw. They looked at the furniture, read about it, questioned how it might have been used and visualised themselves using it. For example in the bedroom of the house, they took a photo of a bed and commented 'It would be nice to sleep in the bed like that'. In one image we see the family getting on a bus (Appendix X) exemplifying their participation in the 'everydayness' of the destination.

Cyril took three photographs of his family. Two of these are of the family standing in front of attractions they visited; one before they enter the Sydney Aquarium (Appendix Y) and the other before they take a ride on the ferry. In the image of the family in front of the aquarium, we see the boys smiling at the photographer while the girl looks cheekily at the boy to her left. The expressions and attitudes of the family members in the photo are live 'action' examples of the family connecting with each other. In the image of the family before they get on the ferry the family members are facing each other while smiling at the camera they are interacting and connecting. The third image is of a single family member. It is a 'headshot' of his daughter sitting in the ferry and looking at the photographer (Appendix Z). The sheer proximity of the photographer to the subject demonstrates their closeness: it is the personal nature of the photograph that indicates the close emotional connection the photographer has to the subject. The photographer has paused for a moment during the day to notice the beauty in the girl, as she sits on the ferry, listening to her music and experiencing Sydney.

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Overwhelmed by the moment, they felt a connection to the girl that they wanted to capture and keep forever. It was a moment that needed to be remembered a moment that the daughter, may not have even realised had passed.

Cyril and his family also enjoyed connecting with Sydney's attractions and physical environment. Cyril comments: 'during our stay in Sydney we are falling in love about Darling Harbour a very nice quarter'. Darling Harbour fostered feelings of such a deep connection that Cyril expressed it as a place they 'love'. The family has used positive language to comment on their images. Words used to describe their experiences include 'impressive', 'funny' and 'pleasant' while on a number of occasions they describe the city as 'beautiful'. These positive, emotive descriptions of the city indicate the emotionally satisfying experience this family had while they were in Sydney.

For some, connecting occurs through engaging with the minutiae of a place. Jingdi and her friend captured the details of what they experienced. For example they did not take photographs of whole buildings, but rather parts of them (Appendix AA) and gargoyles (Appendix BB), or unusual objects in the street (Appendix CC), signs (Appendix DD), objects in windows (Appendix EE) and graffiti (Appendix FF). They took images of random people going about their business, unaware that they were being watched. In most cases the people are moving and we only see them from the back or side. None of the people in the images 'appear' to be doing anything particularly interesting. These elements indicate that Jingdi and her friend want to connect with Sydney's culture, to learn through observation what everyday life is like in Sydney. Of two images of Indigenous buskers (Appendix GG and HH) Jingdi comments 'street art by the first nation'.

Evidence of connections with the 'everydayness' of their experience was captured by Niek and his friend who took photographs of the streets to 'just to show people at home the street image of Sydney'. They found Sydney's streets interesting because 'such streets are very rare in Holland' (Appendix II). By noticing and recording the contrast between the streets of Sydney and Holland the boys connected with another aspect of Sydney's way of life.

There were also images of disconnections. In Canberra one participant captured an empty shopping mall in as 'evidence' of Canberra's lack of soul. In the context of Canberra a number of visitors also noted the disconnectedness of the city's attractions which are widely dispersed..

Immersion

Tourists appeared to immerse themselves in their surroundings where activities involve doing whatever 'they' wanted to, for as long as they wanted to. Comments on images that represent immersion include 'Once again the view. I love water' (Appendix JJ), 'I looked up and liked what I saw with the sun and all' (Appendix KK), 'Not because of the girl! Just a very relaxed moment in the park I wanted to capture in a photo'. Miyoko's family indulged themselves when they ate chips and kebabs for lunch as they recorded the moments of their children eating (Appendix LL ND MM), and commented that 'Kababu for lunch. It was yummy': it was a special treat which the whole family enjoyed.

Bill was immersed in his explorations of the Australian Museum, Art Gallery of New South Wales and the Botanic Gardens, evident in his 105 photographs of the various things he saw and enjoyed while he was there. It is also possible that by participating in the study he was indulging himself, as he celebrates the start of his day with a photograph of himself and a comment declaring '12:37 — let the grand experiment begin!'. In Canberra a child's desire to 'be a ranger when I grow up' led them to take a number of photos of animals in the Canberra Zoo.

Symbols of Power and Nationhood

The physical presence and location of buildings and monuments was evident in many images. This was particularly the case in Canberra where the perspective presented was one of 'building as object'. For example, images of new Parliament House and the Australian War Memorial are depicted and discussed as symbols of power; monuments of Australia that represent the Australian historical and political landscape. Flags flying on significant public buildings were seen as important markers of place. While many of the buildings captured in Canberra have a broad range of exhibits there were significantly more images captured of the striking external architecture of those buildings rather than what was inside them. The exceptions to this appeared to be when strong emotional responses were triggered, for example, in the exhibits at the Australian War Memorial or the images of the Prime Minister's office in Old Parliament House. These images were connected to both the Australian experience more generally and the visitors own experience of these images more specifically.

In Sydney the building as object was depicted in other ways. The grandeur of the Queen Victoria Building (QVB), and the Sydney Opera House and Sydney Harbour Bridge were seen as monuments to Australian culture. Interestingly there were more images captured of the QVB than of the Harbour Bridge.

Summary

There are theoretical links between what has been found here and earlier precinct work (see Hayllar & Griffin 2005) where it was argued that precincts present visitors with opportunities for layered experiences. That is, a visitor may engage at a superficial level—in the case of Canberra by driving from one significant site or attraction to the other without leaving the car—or at deeper levels, through a visit to a site or exhibit with intense engagement as in the case of Bill or Miyoko and her family in Sydney. Layering provides for different 'levels' of experience within a destination —from the main thoroughfares and iconic sites to the back lanes and situational minutiae. In the contexts of planning, layering seeks to ensure that diversity of experience is privileged over homogeneity

Arguably, the layers of Canberra are more difficult to penetrate than Sydney. The dispersed nature of the buildings, their lack of connectivity and minimal external interpretation hamper experiences beyond the superficial. Conversely, Sydney's more intense urban experience has the intrinsic potential to move beyond the potentially 'shallow' experience of visitors to major attractions.

In the contexts of destination marketing, the analysis suggests that the presentation of the images of a city through its iconic sites is an incomplete marketing message. While the number of images captured by the participants highlights the importance of these sites, the commentaries of participants and the more 'meaning' laden images suggests other marketing messages are also important including: the positioning of people 'experiencing' a city; images of detail beyond the iconic sites; and an examination and presentation of different layers of experience within each destination. In our view marketing images need to privilege both place and people.

Chapter 5

CONCLUSION

The aim of this study was to understand the tourist experience and behaviour in urban destinations. The methodologies used have enabled us to examine the tourists experience in depth. As an emerging application of available technologies in a tourism context, the knowledge generated from this study provides a basis for the future development of alternative, reliable and cost-effective methods for gathering data on the spatial behaviour of urban visitors as well as a comparison with other data collection methodologies such as travel diaries.

The accuracy and detail of information about trails and the time spent in different attractions far exceeds anything that can be gathered through travel diaries or post-travel surveys. Though using such modern equipment provides a clear view, it does not negate the need to collect supporting information and feedback via other methods to help interpret the trails. We would argue in fact that in the context of this study it was critical. It is easy to map the results and overlay on Google Earth, and show intensities of use, particularly with the Garmin software, but this neglects individual issues, motivations and serendipitous actions.

The debriefing interview gave us useful information on how people orientated themselves and their barriers to movement, which provided insights into issues such as the adequacy of directional signage and tourist information. Both the visitor tracking and the images captured by visitors demonstrate that tourists are not aware of the different and interesting things that can be experienced in Sydney. There is an opportunity to place greater emphasis on Sydney's culture, natural and built environment, and activities that may relate to special interests.

The 39 urban destination attributes were identified based on interviews with tracking participants and secondary data analysis and grouped under the five categories of city environment, city experience, range of attractions services and food services. Although the attributes were grouped based on face validity, reliabilities indicate good internal consistency and validation of the instrument.

From the total respondents that visited Canberra and Sydney cluster analysis identified three sub-groups, 'the planners', 'spontaneous/repeat visitors' and 'the discoverers'. Segmenting tourists by their demographics and expectations has found that people who research the destination have higher expectations and are more satisfied with their trip.

Managing tourists expectations is as important as managing the performance of a destination particularly in those instances where the destination has no control over the attribute, such as the weather. It is better to market the 'uncontrollable' as realistically as possible.

APPENDICES

Appendix A: Expectations, Importance and Performance Questionnaire

Appendix B: Sydney Survey Collection Venues

Sydney
Rocks Visitor Centre
Darling Harbour Visitor Centre
Australian Maritime Museum
Australian Museum
Powerhouse Museum
Bridge Climb
Taronga Zoo
Government House Parramatta

Appendix C: Cross Tabulation—Activities versus First Time Visit/ Repeat Visits to Sydney

Activities		First Time Visitor		Total (n=1014)
		No	Yes	
Darling Harbour	Count	384	453	837
	% within activities	45.9%	54.1%	
	% within First_vis	77.3%	87.6%	
Circular Quay	Count	387	428	815
	% within activities	47.5%	52.5%	
	% within First_vis	77.9%	82.8%	
Opera House	Count	291	460	751
	% within activities	38.7%	61.3%	
	% within First_vis	58.6%	89.0%	
Rocks	Count	336	409	745
	% within activities	45.1%	54.9%	
	% within First_vis	67.6%	79.1%	
Harbour Bridge	Count	303	434	737
	% within activities	41.1%	58.9%	
	% within First_vis	61.0%	83.9%	
Manly	Count	204	265	469
	% within activities	43.5%	56.5%	
	% within First_vis	41.0%	51.3%	
Bondi	Count	154	274	428
	% within activities	36.0%	64.0%	
	% within First_vis	31.0%	53.0%	
Aquarium	Count	103	198	301
	% within activities	34.2%	65.8%	
	% within First_vis	20.7%	38.3%	
Other Beach	Count	106	136	242
	% within activities	43.8%	56.2%	
	% within First_vis	21.3%	26.3%	
Sydney Tower	Count	81	151	232
	% within activities	34.9%	65.1%	
	% within First_vis	16.3%	29.2%	
Harbour Cruise	Count	144	199	343
	% within activities	42.0%	58.0%	
	% within First_vis	29.0%	38.5%	
Olympic Park	Count	109	162	271

Activities		First Time Visitor		Total (n=1014)
		No	Yes	
	% within activities	40.2%	59.8%	
	% within First_vis	21.9%	31.3%	
Maritime Museum	Count	141	125	266
	% within activities	53.0%	47.0%	
	% within First_vis	28.4%	24.2%	
Zoo	Count	117	129	246
	% within activities	47.6%	52.4%	
	% within First_vis	23.5%	25.0%	
National Park	Count	79	137	216
	% within activities	36.6%	63.4%	
	% within First_vis	15.9%	26.5%	
Powerhouse Museum	Count	85	60	145
	% within activities	58.6%	41.4%	
	% within First_vis	17.1%	11.6%	
Wildlife World	Count	36	93	129
	% within activities	27.9%	72.1%	
	% within First_vis	7.2%	18.0%	
Bridge Climb	Count	59	68	127
	% within activities	46.5%	53.5%	
	% within First_vis	11.9%	13.2%	
Visit Museum of Contemporary Art	Count	50	70	120
	% within activities	41.7%	58.3%	
	% within First_vis	10.1%	13.5%	
Art Gallery of NSW	Count	79	71	150
	% within activities	52.7%	47.3%	
	% within First_vis	15.9%	13.7%	
Olympic Park	Count	45	99	144
	% within activities	31.3%	68.8%	
	% within First_vis	9.1%	19.1%	
Museum of Sydney	Count	44	56	100
	% within activities	44.0%	56.0%	
	% within First_vis	8.9%	10.8%	
Featherdale Wildlife Park	Count	25	56	81
	% within activities	30.9%	69.1%	
	% within First_vis	5.0%	10.8%	
Botanic Gardens	Count	22	41	63
	% within activities	34.9%	65.1%	
	% within First_vis	4.4%	7.9%	
Parramatta Historic Houses	Count	12	23	35
	% within activities	34.3%	65.7%	
	% within First_vis	2.4%	4.4%	
Other	Count	101	91	192
	% within activities	52.6%	47.4%	
	% within First_vis	20.3%	17.6%	

Appendix D: Comparison of Sydney International and Domestic Tourists: Independent Samples Test and Effect Size

	Overseas Visitor	N	Mean	Std. Deviation	Effect Size	Interpretation of Effect Size
Q12CityEnvEXP_ModAppeal	No	324	6.62	2.61	-.170	Very weak
	Yes	598	7.43	2.03		
Q12ACityEnvEXP_HistAppeal	No	324	6.81	2.59	.230	Moderate Effect
	Yes	598	5.59	2.57		
Q12CCityEnvEXP_UrbanEnv	No	324	4.19	2.62	-.260	Moderate Effect
	Yes	598	5.61	2.56		
Q12DCityEnvEXP_BuiltEnv	No	324	5.89	2.88	.100	Very weak
	Yes	598	5.33	2.52		
Q12FCityEnvEXP_Clean	No	324	6.50	2.47	-.133	Very weak
	Yes	598	7.14	2.28		
Q12GCityEnvEXP_Weather	No	324	6.74	2.31	-.306	Moderate Effect
	Yes	598	8.07	1.79		
Q13ACityExpEXP_Relaxing	No	325	5.92	2.52	-.178	Very weak
	Yes	598	6.73	2.31		
Q13BCityExpEXP_Multiculture	No	325	6.01	2.81	-.150	Very weak
	Yes	598	6.80	2.35		
Q13CCityExpEXP_VibUrbAtmos	No	325	6.46	2.72	-.116	Very weak
	Yes	598	7.04	2.18		
Q13DCityExpEXP_Nightlife	No	325	5.26	3.22	-.127	Very weak
	Yes	598	6.03	2.78		
Q13ECityExpEXP_Exciting	No	325	6.37	2.64	-.093	Very weak
	Yes	598	6.84	2.34		
Q13GCityExpEXP_ExpLocalLife	No	325	5.02	2.92	-.200	Very weak
	Yes	598	6.14	2.54		
Q13HCityExpEXP_MeetLocals	No	325	4.41	2.85	-.282	Moderate Effect
	Yes	598	6.02	2.61		
Q13ICityExpEXP_RelaxedLocals	No	325	4.80	2.76	-.328	Moderate Effect
	Yes	598	6.62	2.45		
Q13JCityExpEXP_FriendlyLocals	No	325	5.57	2.63	-.321	Moderate Effect
	Yes	598	7.23	2.25		
Q13KCityExpEXP_HelpfulLocals	No	325	5.89	2.58	-.252	Moderate Effect
	Yes	598	7.15	2.22		
Q13LCityExpEXP_NoLangBarr	No	325	6.70	3.36	-.216	Moderate Effect
	Yes	598	8.00	2.43		
Q14AttractEXP_MuseGalls	No	325	7.71	2.58	.153	Very weak
	Yes	598	6.94	2.36		
Q14CAttractEXP_UniqueHist	No	325	7.49	2.60	.149	Very weak
	Yes	598	6.73	2.41		
Q15DServEXP_Signage	No	325	7.57	2.15	.074	Very weak
	Yes	598	7.25	2.16		
Q15FServEXP_OpenHrs	No	325	7.83	2.20	.108	Very weak
	Yes	598	7.35	2.19		
Q16CFoodEXP_Family	No	325	6.35	2.79	.088	Very weak
	Yes	598	5.86	2.73		
Q17CityEnvIMP_ModAppeal	No	325	6.48	2.37	-.071	Very weak
	Yes	598	6.80	2.08		
Q17ACityEnvIMP_HistAppeal	No	325	7.23	2.20	.095	Very weak
	Yes	598	6.82	2.07		
Q17CCityEnvIMP_UrbanEnv	No	325	5.76	2.53	-.142	Very weak

	Overseas Visitor	N	Mean	Std. Deviation	Effect Size	Interpretation of Effect Size
	Yes	598	6.44	2.18		
Q17GCityEnvIMP_Weather	No	325	7.16	2.15	-.220	Very weak
	Yes	598	8.04	1.73		
Q18ACityExpIMP_Relaxing	No	325	7.16	2.18	-.152	Very weak
	Yes	598	7.77	1.75		
Q18BCityExpIMP_Multiculture	No	325	5.84	2.71	-.202	Very weak
	Yes	598	6.88	2.29		
Q18CCityExpIMP_VibUrbAtmos	No	325	6.33	2.67	-.122	Very weak
	Yes	598	6.92	2.06		
Q18DCityExpIMP_Nightlife	No	325	4.80	3.02	-.083	Very weak
	Yes	598	5.28	2.74		
Q18FCityExpIMP_FamFriendly	No	325	6.80	2.68	.160	Very weak
	Yes	598	5.91	2.77		
Q18GCityExpIMP_ExpLocalLife	No	325	5.45	2.73	-.298	Moderate Effect
	Yes	598	7.00	2.19		
Q18HCityExpIMP_MeetLocals	No	325	5.08	2.73	-.345	Moderate Effect
	Yes	598	6.93	2.27		
Q18ICityExpIMP_RelaxedLocals	No	325	6.10	2.60	-.229	Moderate Effect
	Yes	598	7.22	2.11		
Q18JCityExpIMP_FriendlyLocals	No	325	7.08	2.24	-.230	Moderate Effect
	Yes	598	8.02	1.70		
Q18KCityExpIMP_HelpfulLocals	No	325	7.32	2.22	-.200	Very weak
	Yes	598	8.12	1.64		
Q18LCityExpIMP_NoLangBarr	No	325	6.80	2.81	-.161	Very weak
	Yes	598	7.64	2.29		
Q19AttractIMP_MuseGalls	No	325	7.60	2.24	.122	Very weak
	Yes	598	7.06	2.12		
Q21CFoodIMP_Family	No	325	7.26	2.64	.233	Moderate Effect
	Yes	598	5.95	2.81		
Q22ACityEnvPERF_HistAppeal	No	325	8.14	1.82	-.163	Very weak
	Yes	598	7.49	2.09		
Q22CCityEnvPERF_UrbanEnv	No	325	7.43	2.42	-.083	Very weak
	Yes	598	7.80	1.98		
Q22FCityEnvPERF_Clean	No	325	7.45	2.11	-.198	Very weak
	Yes	598	8.24	1.78		
Q22GCityEnvPERF_Weather	No	325	8.05	2.00	.069	Very weak
	Yes	598	7.76	2.16		
Q23ACityExpPERF_Relaxing	No	323	7.45	2.30	-.131	Very weak
	Yes	598	8.00	1.83		
Q23GCityExpPERF_ExpLocalLife	No	323	7.89	2.43	.132	Very weak
	Yes	598	7.26	2.29		
Q23HCityExpPERF_MeetLocals	No	323	7.67	2.56	.075	Very weak
	Yes	597	7.30	2.30		
Q23JCityExpPERF_FriendlyLocals	No	323	7.60	2.17	-.109	Very weak
	Yes	598	8.05	1.92		
Q23KCityExpPERF_HelpfulLocals	No	323	7.72	2.11	-.095	Very weak
	Yes	598	8.11	1.93		
Q24AttractPERF_MuseGalls	No	325	8.83	1.68	.130	Very weak
	Yes	598	8.34	2.02		
Q24AAttractPERF_MusicPerf	No	325	9.01	2.18	.083	Very weak
	Yes	598	8.64	2.24		
Q24BAttractPERF_SpecEvents	No	325	8.92	2.19	.067	Very weak

	Overseas Visitor	N	Mean	Std. Deviation	Effect Size	Interpretation of Effect Size
	Yes	598	8.61	2.37		
Q24CAttractPERF_UniqueHist	No	325	8.67	1.69	0.	Large
	Yes	598	7.92	2.02		
Q24DAttractPERF_IntAct	No	325	8.70	1.62	.122	Very weak
	Yes	598	8.27	1.87		
Q25AServPERF_TransEasy	No	325	8.23	2.04	.043	Very weak
	Yes	598	8.05	2.05		
Q25FServPERF_OpenHrs	No	325	8.38	1.74	.175	Very weak
	Yes	598	7.69	2.11		

Appendix E: Expectations–Importance–Performance of Sydney Destination Attributes: Domestic Tourists

Item	Mean Expectation	Mean Importance	Mean Performance	Importance Performance Grid Position
City Environment				
Cleanliness	6.50	8.14	7.36	Concentrate Here
Old/ historic visual appeal	6.81	7.23	7.99	Possible Overkill
Good weather	6.74	7.16	7.89	Possible Overkill
Modern/visual appeal	6.62	6.48	7.80	Possible Overkill
Interesting architecture	6.51	6.96	8.06	Possible Overkill
Variety of recreational spaces	5.92	6.84	7.54	Low Priority
Dense built environment	5.89	4.82	6.70	Low Priority
Spacious urban environment	4.19	5.76	6.75	Low Priority
City Experience				
Helpful local people	5.89	7.32	7.41	Concentrate Here
Vibrant nightlife	5.26	4.80	6.92	Low Priority
No language barriers	6.70	6.80	8.17	Possible Overkill
Opportunity to meet local people	4.41	5.08	6.77	Low Priority
Opportunity to experience local way of life	5.02	5.45	6.99	Low Priority
Multicultural experience	6.01	5.84	7.20	Low Priority
Vibrant urban atmosphere	6.46	6.33	7.48	Low Priority
Sense of excitement	6.37	6.41	7.57	Low Priority
Relaxed local people	4.80	6.10	6.87	Low Priority
Family friendly environment	5.94	6.80	7.48	Low Priority
Friendly local people	5.57	7.08	7.26	Low Priority
A relaxing place to visit	5.92	7.16	7.45	Low Priority
Good to walk around	7.33	8.26	8.34	Keep Up The Good Work
Range of Attractions				
Music and performance	6.66	6.75	7.78	Possible Overkill
Special events	6.33	6.73	7.58	Low Priority
Museums and galleries	7.71	7.60	8.48	Keep Up the Good Work
Unique history	7.49	7.62	8.34	Keep Up the Good Work
Interesting activities	7.77	8.00	8.42	Keep Up the Good Work
Services				
Reasonable priced local transport	7.17	8.41	7.64	Concentrate Here
Good signage (directions	7.57	8.46	7.71	Keep Up The Good Work
Convenient opening hours	7.83	8.27	8.25	Keep Up The Good Work
Easy to find attractions and services	7.70	8.38	8.28	Keep Up The Good Work
Good availability of tourism information	7.87	8.40	8.19	Keep Up The Good Work
Reliable local transport	7.58	8.50	8.08	Keep Up The Good Work
Local transport easy to use and understand	7.63	8.43	8.00	Keep Up The Good Work
Food Services				
Reasonable prices	6.78	8.43	7.16	Concentrate Here
Family oriented	6.35	7.26	7.62	Concentrate Here
Good variety of food	7.98	8.42	8.10	Keep Up The Good Work
Good availability of food	8.05	8.49	8.15	Keep Up The Good Work
Healthy and fresh	7.54	8.48	7.93	Keep Up The Good Work
Good quality	7.78	8.68	7.90	Keep Up The Good Work

a Higher scores indicate higher levels for each item; b Scale Range 1–10 for each item.

Appendix F: Expectations–Importance–Performance of Sydney Destination Attributes: International Tourists

Item	Mean Expectation	Mean Importance	Mean Performance	Importance/Performance Grid Position
City Environment				
Good weather	8.07	8.04	7.66	Concentrate Here
Modern/visual appeal	7.43	6.80	8.17	Possible Overkill
Variety of recreational spaces	6.18	6.84	7.92	Possible Overkill
Interesting architecture	6.61	7.15	7.85	Possible Overkill
Spacious urban environment	5.61	6.44	7.53	Low Priority
Dense built environment	5.33	4.85	6.82	Low Priority
Old/historic visual appeal	5.59	6.82	7.38	Low Priority
Cleanliness	7.14	8.19	8.18	Keep Up The Good Work
City Experience				
Family friendly environment	5.86	5.91	8.08	Possible Overkill
Vibrant nightlife	6.03	5.28	7.02	Low Priority
Sense of excitement	6.84	6.67	7.21	Low Priority
Vibrant urban atmosphere	7.04	6.92	7.76	Low Priority
Multicultural experience	6.80	6.88	7.40	Low Priority
Relaxed local people	6.62	7.22	7.64	Low Priority
Opportunity to meet local people	6.02	6.93	7.06	Low Priority
Opportunity to experience local way of life	6.14	7.00	6.95	Low Priority
Good to walk around	7.54	8.45	8.51	Keep Up The Good Work
Friendly local people	7.23	8.02	7.98	Keep Up The Good Work
A relaxing place to visit	6.73	7.77	7.94	Keep Up The Good Work
Helpful local people	7.15	8.12	8.03	Keep Up The Good Work
No language barriers	8.00	7.64	8.52	Keep Up The Good Work
Range of Attractions				
Museums and galleries	6.94	7.06	7.85	Possible Overkill
Music and performance	6.43	6.45	7.45	Low Priority
Unique history	6.73	7.40	7.67	Low Priority
Special events	6.15	6.42	7.26	Low Priority
Interesting activities	7.48	7.83	7.95	Keep Up The Good Work
Services				
Convenient opening hours	7.35	8.14	7.62	Concentrate Here
Good signage (directions	7.25	8.32	7.73	Concentrate Here
Reasonable priced local transport	7.17	8.24	7.55	Concentrate Here
Easy to find attractions and services	7.53	8.22	8.35	Keep Up The Good Work
Good availability of tourism information	7.98	8.42	8.25	Keep Up The Good Work
Local transport easy to use and understand	7.61	8.46	7.92	Keep Up The Good Work
Reliable local transport	7.53	8.45	8.18	Keep Up The Good Work
Food Services				
Reasonable prices	6.96	8.29	7.28	Concentrate Here
Family oriented	5.86	5.95	7.39	Low Priority

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Item	Mean Expectation	Mean Importance	Mean Performance	Importance/Performance Grid Position
Good variety of food	7.87	8.30	8.19	Keep Up The Good Work
Good availability of food	7.96	8.40	8.26	Keep Up The Good Work
Healthy and fresh	7.56	8.41	8.13	Keep Up The Good Work
Good quality	7.79	8.58	8.13	Keep Up The Good Work

a Higher scores indicate higher levels for each item; b Scale Range 1–10 for each item.

Appendix G: Cross Tabulation — Activities versus First Time Visit/ Repeat Visits to Canberra

Activities		First_vis		Total
		No	Yes	
Australian War Memorial	Count	184	87	271
	% within attract	67.9%	32.1%	
	% within First_vis	70.2%	79.8%	
Parliament House	Count	122	69	191
	% within attract	63.9%	36.1%	
	% within First_vis	46.6%	63.3%	
Old Parliament House	Count	105	56	161
	% within attract	65.2%	34.8%	
	% within First_vis	40.1%	51.4%	
National Museum of Australia	Count	91	53	144
	% within attract	63.2%	36.8%	
	% within First_vis	34.7%	48.6%	
National Gallery of Australia	Count	96	41	137
	% within attract	70.1%	29.9%	
	% within First_vis	36.6%	37.6%	
Black Mountain	Count	87	34	121
	% within attract	71.9%	28.1%	
	% within First_vis	33.2%	31.2%	
Questacon	Count	79	28	107
	% within attract	73.8%	26.2%	
	% within First_vis	30.2%	25.7%	
Botanic Gardens	Count	72	34	106
	% within attract	67.9%	32.1%	
	% within First_vis	27.5%	31.2%	
Royal Australian Mint	Count	55	16	71
	% within attract	77.5%	22.5%	
	% within First_vis	21.0%	14.7%	
National Library of Australia	Count	39	19	58
	% within attract	67.2%	32.8%	
	% within First_vis	14.9%	17.4%	
National Portrait Gallery	Count	35	16	51
	% within attract	68.6%	31.4%	
	% within First_vis	13.4%	14.7%	
Australian Institute of Sport	Count	35	15	50
	% within attract	70.0%	30.0%	
	% within First_vis	13.4%	13.8%	
Cockington Green Gardens	Count	38	12	50
	% within attract	76.0%	24.0%	
	% within First_vis	14.5%	11.0%	
High Court	Count	33	14	47
	% within attract	70.2%	29.8%	
	% within First_vis	12.6%	12.8%	
National Carillion	Count	38	9	47
	% within attract	80.9%	19.1%	
	% within First_vis	14.5%	8.3%	

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Activities		First_vis		Total
		No	Yes	
Tidbinbilla Nature Reserve	Count	29	9	38
	% within attract	76.3%	23.7%	
	% within First_vis	11.1%	8.3%	
National Capital Exhibition	Count	27	9	36
	% within attract	75.0%	25.0%	
	% within First_vis	10.3%	8.3%	
Deep Space Communications Complex	Count	26	8	34
	% within attract	76.5%	23.5%	
	% within First_vis	9.9%	7.3%	
National Zoo and Aquarium	Count	24	7	31
	% within attract	77.4%	22.6%	
	% within First_vis	9.2%	6.4%	
National Film and Sound Archive	Count	23	5	28
	% within attract	82.1%	17.9%	
	% within First_vis	8.8%	4.6%	
CSIRO	Count	21	3	24
	% within attract	87.5%	12.5%	
	% within First_vis	8.0%	2.8%	
Floriade	Count	17	1	18
	% within attract	94.4%	5.6%	
	% within First_vis	6.5%	.9%	
Reptile Centre	Count	10	5	15
	% within attract	66.7%	33.3%	
	% within First_vis	3.8%	4.6%	
Lanyon Homestead	Count	9	2	11
	% within attract	81.8%	18.2%	
	% within First_vis	3.4%	1.8%	
Railway Museum	Count	5	3	8
	% within attract	62.5%	37.5%	
	% within First_vis	1.9%	2.8%	
Other	Count	15	7	22
	% within attract	68.2%	31.8%	
	% within First_vis	5.7%	6.4%	

Appendix H: Comparison of Canberra International and Domestic Tourists: Independent Samples Test and Effect Size

	Overseas Visitor	N	Mean	Std. Deviation	Effect Size	Interpretation of Effect Size
Q11ACityEnvEXP_HistAppeal	No	256	5.16	2.708	0.169	Weak Effect
	Yes	70	4.26	2.535		
Q11GCityEnvEXP_Weather	No	256	5.05	2.575	-0.289	Moderate Effect
	Yes	70	6.69	2.841		
Q12BCityExpEXP_Multiculture	No	256	4.41	2.528	-0.13	Weak Effect
	Yes	70	5.10	2.703		
Q12GCityExpEXP_ExpLocalLife	No	256	4.07	2.583	-0.197	Very Weak
	Yes	70	5.17	2.874		
Q12HCityExpEXP_MeetLocals	No	256	3.93	2.495	-0.304	Moderate Effect
	Yes	70	5.57	2.641		
Q12ICityExpEXP_RelaxedLocals	No	256	4.45	2.625	-0.239	Moderate Effect
	Yes	70	5.79	2.812		
Q12JCityExpEXP_FriendlyLocals	No	256	5.17	2.650	-0.246	Moderate Effect
	Yes	70	6.49	2.535		
Q12KCityExpEXP_HelpfulLocals	No	256	5.57	2.587	-0.182	Weak Effect
	Yes	70	6.51	2.466		
Q13AttractEXP_MuseGalls	No	256	8.61	2.024	-0.231	Moderate Effect
	Yes	70	7.59	2.262		
Q13BAttractEXP_SpecEvents	No	256	6.25	2.849	-0.244	Moderate Effect
	Yes	70	4.90	2.497		
Q13CAttractEXP_UniqueHist	No	256	7.12	2.865	0.164	Weak Effect
	Yes	70	6.21	2.576		
Q13DAttractEXP_IntAct	No	256	7.26	2.619	0.219	Moderate Effect
	Yes	70	6.10	2.532		
Q14ServEXP_EasyLocateServ	No	256	7.38	2.353	0.168	Weak Effect
	Yes	70	6.60	2.216		
Q16GCityEnvIMP_Weather	No	256	6.14	2.383	-0.243	Moderate Effect
	Yes	70	7.24	1.974		
Q17FCityExpIMP_FamFriendly	No	256	6.61	2.643	0.154	Weak Effect
	Yes	70	5.79	2.609		
Q17GCityExpIMP_ExpLocalLife	No	256	4.83	2.627	-0.329	Moderate Effect
	Yes	70	6.56	2.326		
Q17HCityExpIMP_MeetLocals	No	256	4.70	2.522	-0.347	Moderate Effect
	Yes	70	6.49	2.301		
Q17ICityExpIMP_RelaxedLocals	No	256	5.68	2.452	-0.284	Moderate Effect
	Yes	70	7.00	1.978		
Q17JCityExpIMP_FriendlyLocals	No	256	6.55	2.319	-0.269	Moderate Effect
	Yes	70	7.67	1.613		
Q17KCityExpIMP_HelpfulLocals	No	256	6.77	2.348	-0.267	Moderate Effect
	Yes	70	7.86	1.487		
Q18AttractIMP_MuseGalls	No	256	8.35	1.783	0.207	Moderate Effect
	Yes	70	7.61	1.705		
Q18BAttractIMP_SpecEvents	No	256	6.61	2.325	0.144	Weak Effect
	Yes	70	5.94	2.277		
Q19AServIMP_TransEasy	No	256	5.86	3.018	-0.25	Moderate Effect
	Yes	70	7.29	2.480		
Q19BServIMP_RelyTrans	No	256	5.87	3.068	-0.231	Moderate Effect
	Yes	70	7.20	2.488		

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	Overseas Visitor	N	Mean	Std. Deviation	Effect Size	Interpretation of Effect Size
Q19CServIMP_TransCost	No	256	5.79	3.080	-0.241	Moderate Effect
	Yes	70	7.16	2.381		
Q20CFoodIMP_Family	No	256	6.70	2.709	0.156	Weak Effect
	Yes	70	5.87	2.531		
Q21ACityEnvPERF_HistAppeal	No	256	7.52	2.194	0.212	Moderate Effect
	Yes	70	6.50	2.477		
Q21BCityEnvPERF_Architect	No	256	7.53	2.178	0.09	Weak Effect
	Yes	70	7.13	2.239		
Q21FCityEnvPERF_Clean	No	256	8.08	2.005	-0.15	Weak Effect
	Yes	70	8.63	1.571		
Q22BCityExpPERF_Multiculture	No	256	7.32	2.679	0.16	Weak Effect
	Yes	70	6.50	2.364		
Q22CCityExpPERF_VibUrbAtmos	No	256	7.00	2.824	0.183	Weak Effect
	Yes	70	6.03	2.340		
Q22ECityExpPERF_Exciting	No	256	7.18	2.822	0.156	Weak Effect
	Yes	70	6.31	2.657		

Appendix I: Expectations–Importance–Performance of Canberra Destination Attributes: Domestic Tourists

	Mean Expectation	Mean Importance	Mean Performance	Importance Performance Grid Position
City Environment				
Old/ historic visual appeal	5.16	6.50	7.31	Concentrate Here
Dense built environment	3.63	3.91	5.82	Low Priority
Good weather	5.05	6.14	7.45	Low Priority
Modern/ Visual Appeal	6.31	6.28	7.53	Possible Overkill
A variety of recreational parks	6.29	7.09	7.89	Possible Overkill
Cleanliness	7.52	8.08	8.01	Keep Up The Good Work
Interesting architecture	5.89	6.49	7.27	Keep Up The Good Work
Spacious urban environment	6.23	6.26	7.33	Keep Up The Good Work
City Experience				
Helpful local people	5.57	6.77	7.28	Concentrate Here
Family friendly environment	6.17	6.61	7.55	Possible Overkill
No language barriers	6.80	6.26	8.28	Possible Overkill
Opportunity to meet local people	3.93	4.70	6.49	Low Priority
Multicultural experience	4.41	4.94	6.40	Low Priority
Sense of excitement	3.88	4.98	6.21	Low Priority
Relaxed local people	4.45	5.68	6.88	Low Priority
Vibrant urban atmosphere	4.22	5.20	6.10	Low Priority
Friendly local people	5.17	6.55	7.15	Low Priority
Vibrant nightlife	2.93	3.60	5.33	Low Priority
Opportunity to experience local way of life	4.07	4.83	6.51	Low Priority
A relaxing place to visit	6.42	7.48	7.78	Keep Up The Good Work
Good to walk around	6.32	7.55	7.59	Keep Up The Good Work
Range of Attractions				
Special events	6.25	6.61	7.69	Possible Overkill
Music and performance	5.54	5.91	7.10	Low Priority
Unique history/heritage sites	7.12	7.45	8.45	Keep Up The Good Work
Interesting activities	7.26	7.73	8.28	Keep Up The Good Work
Museums and galleries	8.61	8.35	8.90	Keep Up The Good Work
Services				
Reasonable priced local transport	4.72	5.79	6.72	Possible Overkill
Local transport easy to use and understand	4.95	5.86	6.59	Possible Overkill
Reliable local transport	4.66	5.87	6.54	Possible Overkill
Good availability of tourism information	7.68	8.30	8.21	Keep Up The Good Work
Easy to find attractions and services	7.38	8.23	8.07	Keep Up The Good Work
Convenient opening hours	7.05	8.02	7.71	Keep Up The Good Work

	Mean Expectation	Mean Importance	Mean Performance	Importance Performance Grid Position
Good signage/ directions	7.20	8.34	7.45	Keep Up The Good Work
Food Services				
Reasonable Prices	6.73	8.09	7.19	Concentrate Here
Healthy and fresh	7.06	8.20	7.71	Keep Up The Good Work
Good variety of food	7.20	8.25	7.73	Keep Up The Good Work
Good availability of food	7.32	8.20	7.57	Keep Up The Good Work
Good quality	7.43	8.36	7.66	Keep Up The Good Work
Family oriented	6.27	6.70	7.61	Keep Up The Good Work

Appendix J: Expectations–Importance–Performance of Canberra Destination Attributes: International Tourists

	Mean Expectation	Mean Importance	Mean Performance	Importance Performance Grid Position
City Environment				
Modern/visual appeal	5.86	6.41	7.74	Possible Overkill
A variety of recreational parks	5.96	6.86	7.83	Possible Overkill
Dense built environment	3.80	4.17	5.78	Low Priority
Interesting architecture	5.30	6.94	7.14	Low Priority
Old/historic visual appeal	4.26	6.73	6.47	Low Priority
Good weather	6.69	7.24	8.04	Keep Up The Good Work
Spacious urban environment	5.63	6.31	7.43	Keep Up The Good Work
Cleanliness	7.29	8.07	8.59	Keep Up The Good Work
City Experience				
Good to walk around	6.39	7.76	7.19	Concentrate Here
Opportunity to meet local people	5.57	6.49	7.27	Possible Overkill
Vibrant urban atmosphere	4.36	5.66	5.73	Possible Overkill
Vibrant nightlife	3.31	4.13	4.86	Low Priority
No language barriers	7.23	6.50	8.48	Low Priority
Family friendly environment	5.70	5.79	7.16	Low Priority
Sense of excitement	3.93	5.29	5.79	Low Priority
Opportunity to experience local way of life	5.17	6.56	7.02	Low Priority
Relaxed local people	5.79	7.00	7.65	Low Priority
Multicultural experience	5.10	5.64	6.15	Keep Up The Good Work
Friendly local people	6.49	7.67	7.70	Keep Up The Good Work
A relaxing place to visit	6.30	7.54	7.64	Keep Up The Good Work
Helpful local people	6.51	7.86	7.77	Keep Up The Good Work
Range of attractions				
Special events	4.90	5.94	6.45	Low Priority
Music and performance	4.93	6.00	5.97	Low Priority

	Mean Expectation	Mean Importance	Mean Performance	Importance Performance Grid Position
Museums and galleries	7.59	7.61	8.83	Keep Up the Good Work
Interesting activities	6.10	7.29	7.45	Keep Up the Good Work
Unique history/heritage sites	6.21	7.39	7.91	Keep Up the Good Work
Services				
Convenient opening hours	6.64	7.91	7.22	Concentrate Here
Good signage/ directions	6.77	8.17	7.17	Concentrate Here
Reasonable priced local transport	5.34	7.16	6.72	Possible Overkill
Reliable local transport	5.33	7.20	6.43	Possible Overkill
Local transport easy to use and understand	5.50	7.29	6.47	Possible Overkill
Good availability of tourism information	7.11	8.17	7.59	Keep Up The Good Work
Easy to find attractions and services	6.60	8.04	7.69	Keep Up The Good Work
Food Services				
Reasonable prices	6.54	8.23	7.11	Concentrate Here
Family oriented	5.70	5.87	7.28	Possible Overkill
Healthy and fresh	7.14	8.14	7.56	Keep Up The Good Work
Good quality	7.07	8.24	7.56	Keep Up The Good Work
Good variety of food	7.04	8.01	7.31	Keep Up The Good Work
Good availability of food	7.13	8.14	7.37	Keep Up The Good Work

Appendix K: Cluster Profile for Whole Sample

Item	Total (n = 1181)	Cluster 1 (n = 491)	Cluster 2 (n = 386)	Cluster 3 (n =304)
Gender				
Male	483	37%	37%	26%
Female	698	45%	30%	26%
Age				
18−24	115	37%	14%	50%
25−34	274	39%	23%	39%
35−44	242	43%	38%	20%
45−54	249	48%	38%	14%
55−64	219	42%	39%	19%
65−74	69	36%	42%	22%
75−84	11	27%	64%	9%
85+	2	50%	50%	0%
Education				
Primary school	5	20%	60%	20%
High school	163	49%	39%	13%
Technical/Trade qualification	191	51%	33%	16%
Undergraduate degree	360	37%	33%	30%
Postgraduate degree	434	38%	30%	32%
TAFE/Private college/Diploma	28	57%	29%	14%
Origin				
Domestic Visitor	542	41%	59%	0%
International Visitor	639	42%	10%	47%
First Time Visitor				
No	645	45%	47%	8%
Yes	536	37%	16%	47%
Accommodation Used				
Hotel	473	47%	25%	29%
Motel	72	31%	64%	6%
Bed & breakfast	20	35%	30%	35%
Apartment/serviced apartment	199	49%	35%	16%
Backpackers/Hostel	104	23%	13%	64%
Caravan park	41	24%	71%	5%
Home of friends/relatives	226	43%	36%	20%
None/Day visit	24	21%	75%	4%
Share accommodation	8	25%	38%	38%
Other	9	33%	22%	44%
Host/Homestay	5	60%	20%	20%
Decision to Visit				
Less than 1 week prior to your visit	76	40%	46%	15%
More than 1 week, less than 1 month prior to your visit	202	40%	46%	14%
1−6 months prior to visit	628	40%	33%	26%
7−12 months prior to visit	193	48%	18%	34%
More than 12 months prior to visit	82	42%	17%	42%
Travel Companion				
Travelling alone	195	36%	23%	41%
Partner/Spouse	508	43%	31%	26%
Immediate family	238	47%	47%	6%

Other family members	30	40%	43%	17%
Friends	102	37%	24%	39%
Family & friends	52	54%	35%	12%
Business colleague/s	31	13%	26%	61%
Organised group	8	38%	63%	0%
Student group	17	35%	18%	47%
Main Purpose of Visit				
Holiday	666	44%	28%	29%
Visiting friends & relatives	220	46%	38%	16%
Education/Study	57	42%	19%	39%
Business	88	30%	36%	34%
Conference or convention	46	22%	43%	35%
Just passing through	40	35%	53%	13%
Specific attraction/event	50	38%	60%	2%
Other	14	43%	43%	14%
Most Important Source of Trip Information*				
Travel book, travel guide or brochure	214	32%	13%	55%
Internet	472	43%	36%	21%
Tour company or tour operator	27	48%	26%	26%
Tourist office or visitor information centre	75	47%	43%	11%
Advertising	9	56%	33%	11%
Travel articles or documentaries	9	67%	22%	11%
Word of mouth family and friends	198	41%	32%	27%
Word of mouth other travellers	30	50%	10%	40%
Past experiences	130	46%	52%	2%
None	14	29%	64%	7%

*Multiple responses allowed

Appendix L: Cluster Profile for Whole Sample by Attribute

Item	Cluster 1 (n = 491) Mean[ab]	Cluster 2 (n = 386) Mean[ab]	Cluster 3 (n = 304) Mean[ab]
Expectation Score—City Environment			
Modern/visual appeal	7.90	5.40	7.18
Old/historic visual appeal	7.16	4.79	4.57
Interesting architecture	7.48	5.07	6.08
Spacious urban environment	6.29	4.25	5.29
Dense built environment	6.05	3.84	4.88
Variety of recreational spaces	7.25	5.00	5.71
Cleanliness	8.09	6.01	6.67
Good weather	7.99	5.28	7.77
Expectation Score—City Experience			
Good to walk around	8.49	5.78	6.81
A relaxing place to visit	7.70	5.14	6.06
Multicultural experience	7.36	4.05	6.31
Vibrant urban atmosphere	7.58	4.19	6.46
Vibrant nightlife	6.48	2.80	5.62
Sense of Excitement	7.50	3.85	6.16
Family friendly environment	7.50	4.69	4.93
Opportunity to Experience Local Way of Life	7.06	3.16	5.48
Opportunity to Meet Local People	6.57	3.03	5.56
Relaxed local people	7.09	3.37	6.24
Friendly local people	7.72	4.18	6.85
Helpful local people	7.86	4.53	6.66
No language barriers	8.45	5.72	7.75
Expectation Score—Range of Attractions			
Museums and Galleries	8.27	7.30	6.52
Music and Performance	7.56	4.87	5.81
Special events	7.54	5.04	5.41
Unique history/ heritage sites	8.22	6.31	5.78
Interesting activities	8.52	6.54	6.83
Expectation Score—Services			
Easy to find attractions and services	8.69	6.51	6.83
Local transport easy to use and understand	8.48	5.13	6.78
Reliable local transport	8.42	5.02	6.64
Reasonable priced local transport	8.20	4.79	6.21
Good signage (directions)	8.56	6.43	6.44
Good availability of tourism information	8.88	6.98	7.32
Convenient opening hours	8.54	6.49	6.63
Expectation Score—Food Services			
Healthy and fresh	8.62	6.35	6.94
Good variety of food	8.80	6.72	7.27
Good availability of food	8.83	6.80	7.48
Family oriented	7.67	4.79	5.01
Good quality of food	8.76	6.71	7.19
Reasonable prices	8.01	5.78	6.35

a Higher scores indicate higher levels for each variable; b Scale Range 1–10 for each item.

Appendix M: Image Categories for Sydney and Canberra

Sydney	No of Images Taken	Sydney	No of Images Taken
Port Jackson	242	St. Andrews Cathedral George St.	15
Darling Harbour	141	The Rocks	16
Sydney Opera House	138	Shop(s), Shopping Street, Restaurant	14
Queen Victoria Building	121	Chinatown	12
Harbour Bridge	101	Bats	11
Sydney Aquarium —Inside	81	Chinatown (Entrance with Lion)	10
Botanic Garden—plants and animals	39	Food / Drinks	9
Manly	33	Watsons Bay—Beach	8
Royal Botanic Gardens	32	Lighthouse Sydney	8
Watsons Bay—Rocky Coastline	32	Luna Park	7
Hyde Park	27	Fort Denison	7
Birds	26	St. Mary's Cathedral	6
Fish Markets—Fish	25	Governor Philip Statue	5
Christmas Decoration	22	Sydney Harbour Boats	4
Chinese Gardens	39	Anzac War Memorial	4
Art Gallery New South Wales	19	Sydney University	4
Manly Beach - Sea	17	Anzac Bridge	3
Aboriginal Performers (and others)	17	Monorail	3
Manly Corso, Boardwalk, Buildings	16	Chinatown Golden Tree	2
Centre Point Tower	15		

Canberra	No of Images Taken	Canberra	No of Images Taken
The Australian War Memorial	328		
Floriade	100	Cityscape, Urban Landscape	7
New Parliament House	99	Telstra Tower	6
Old Parliament House	63	Band Playing Music	6
Anzac Parade Canberra	60	Aboriginal Embassy Protesting	6
Lake Burley Griffin	54	National Capital Exhibition	6
Flora and Fauna	43	Hanging Ball in front of NAG	5
Lake Burley Griffin	35	National Carillion	5
Questacon	31	Artworks near High Court	4
Botanic Gardens	17	National Sound and Archive Bldg.	4
Buildings /Houses	17	Church	4
High Court Canberra	14	High Court Silver Artwork	3
National Art Gallery	12	The Shine Dome Building	3
National Museum	10	'Pears' Artwork Canberra	3
Mount Ainslie	10	'World Bowl' Artwork	2
Animals—Zoo	10	Canberra Centre incl. Artwork	1
Australian Mint	9		
Other Artwork	8		
Old Timers, Special Cars / Motors	7		

Appendix N

Appendix O
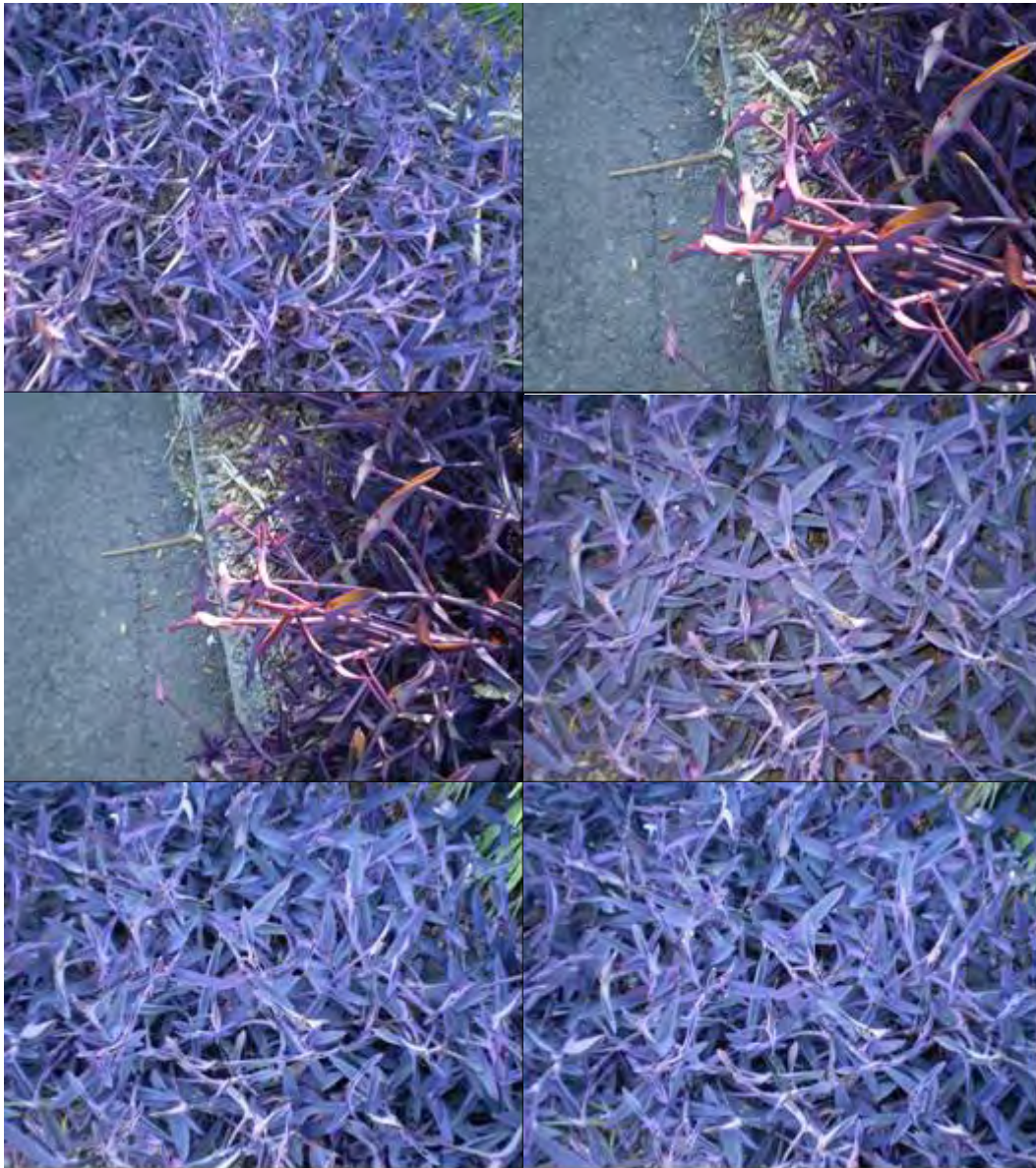
Appendix P

Appendix Q

Appendix R

Appendix S

Appendix T

Appendix U

Appendix V

Appendix W

Appendix X

Appendix Y

Appendix Z

Appendix AA

Appendix BB

Appendix CC

Appendix DD

Appendix EE

Appendix FF

Appendix GG

Appendix HH

Appendix II

Appendix JJ

Appendix KK

Appendix LL

Appendix MM

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Associate Professor Bruce Hayllar

Bruce is an Associate Professor and Head of the School of Leisure, Sport and Tourism at the University of Technology Sydney. Bruce has an extensive portfolio of applied research projects for both the public and private sectors. Bruce has a particular interest in the experience of people in learning and leisure environments and has applied his interest in phenomenology to inform this understanding. Bruce's research interests are in urban tourism, tourism precincts and camping and caravanning.

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Tracey is currently working in the Centre for Tourism Research Unit, University of Canberra. Her major achievements/awards are Women's Sport and Recreation Administration Scholarship Program, International Travel Scholarship to attend the Wilderness Risk Management Conference in Lake Geneva, WI, USA, October 2001. NSW Sports Safety Awards, 2000: Winner of the Silver Medal for 'Outstanding Educational Promotional Program'. Tracey's qualifications are B Com (Accounting), Grad Dip Ed (Adult Ed), M Ed (Adult Ed), M Com (HRM), PhD (Experiential Learning), Diploma Outdoor Recreation. Research interests are training and development, risk management, campsite accreditation.

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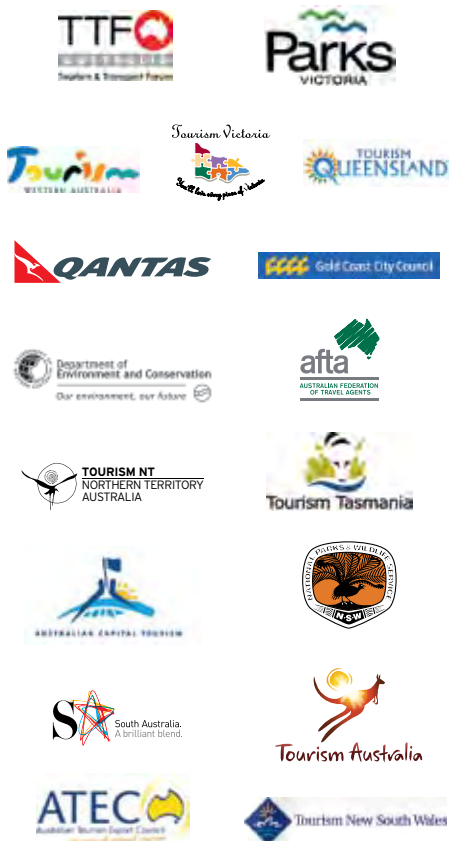

Stephen Schweinsberg

Stephen is a research associate in the School of Leisure Sport and Tourism at the University of Technology Sydney. His recently completed PhD considered the development of frameworks to assess the role of nature tourism as an agent of economic and social change in Australian rural communities. His PhD study was supported through a Sustainable Tourism Cooperative Research Centre (STCRC) Industry Scholarship, jointly funded by TTF Australia: Tourism and Transport Forum and the Australian Sport and Tourism Youth Foundation. Stephen has published in a range of academic forums including Australian Planner, the Finish Journal of Tourism Research, Australasian Parks and Leisure and Geographical Research. He has completed technical reports for the Australian Commonwealth Government and the STCRC and has graduate and undergraduate teaching experience in the School of Leisure Sport and Tourism (UTS), the Graduate School of the Environment (Macquarie University) and the School of Geosciences (University of Sydney).

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- Travel and tourism industry
- Academic researchers
- Government policy makers

COMMUNICATION

INNOVATION

COMMERCIALISE

RESEARCH AND DEVELOPMENT

COLLABORATION

EDUCATION AND TRAINING

UTILISE

- New products, services and technologies
- Uptake of research finding by business, government and academe
- Improved business productivity
- Industry-ready post-graduate students
- Public good benefits for tourism destinations

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EC3, a wholly-owned subsidiary company, takes the outcomes from the relevant STCRC research; develops them for market; and delivers them to industry as products and services. EC3 delivers significant benefits to the STCRC through the provision of a wide range of business services both nationally and internationally.

KEY EC3 PRODUCTS

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SUSTAINABLE
TOURISM

CRC

Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program.

STCRC is the world's leading scientific institution delivering research to support the sustainability of travel and tourism—one of the world's largest and fastest growing industries.

Introduction

STCRC has grown to be the largest dedicated tourism research organisation in the world, with $187 million invested in tourism research programs, commercialisation and education since 1997.

STCRC was established in July 2003 under the Commonwealth Government's CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC's objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia's sustainable economic and social development;

- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;

- the value of graduate researchers to Australia;

- collaboration among researchers, between searchers and industry or other users; and

- efficiency in the use of intellectual and other research outcomes.