

SUCCESS FACTORS IN CULTURAL HERITAGE TOURISM ENTERPRISE MANAGEMENT



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National Library of Australia Cataloguing-in-Publication entry

Success factors in cultural heritage tourism enterprise management / Jack Carlsen ... [et al.].

ISBNs: 9781921521119 (pbk.), 9781921521126 (pdf).

Notes: Bibliography.

Subjects: Heritage tourism—Australia—Case studies.

338.479194

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First published in Australia in 2008 by CRC for Sustainable Tourism Pty Ltd

Printed in Australia (Gold Coast, Queensland)

Cover designed by Sin Design

Acknowledgements

The Sustainable Tourism Cooperative Research Centre, established and supported under the Australian Government's Cooperative Research Centres Program, funded this research. The project was supported by an industry reference group consisting of: Mr David Bannear (Heritage Victoria); Ms Deb Lewis (Tourism Tasmania); Mr David McCulloch (Heritage Council of WA); and Mr Ray Supple (Parks Victoria). The researchers thank the cultural heritage tourism managers and operators who volunteered their time to provide their knowledge for this project. Thanks also to Solenne Muller-Fuega who provided input to this project while working as an intern at Curtin University on exchange from France.

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SUMMARY

This project sought to identify critical factors for successfully balancing viable cultural heritage tourism (CHT) enterprise with heritage conservation goals. Information was gathered from site visits and interviews with operators and cultural heritage managers. The outcomes will be of interest to government agencies and heritage tourism operators in the public and private sector.

Objectives

- Identify critical success factors for cultural heritage tourism enterprises, based on published literature and case studies.
- Examine case studies of management practices that have contributed to the success of cultural heritage tourism attractions.
- Identify a set of factors that contribute to success in achieving viable cultural heritage tourism and heritage conservation goals.

The project aims focus on the operational side of cultural heritage tourism and as such did not specifically set out to address conservation or visitor experience issues. However, these two factors manifest throughout the description of what makes a successful heritage tourism enterprise.

Method

Success factors were identified based on a review of published research and observations during site visits by the researchers involved in the project and ranking and refinement discussions with cultural heritage tourism operation managers. A range of factors were identified in the literature and subsequently were expanded as a result of site visits and interviews. More than half the success factors identified were business operation related. This perhaps reflects that generic information relating to tourism business operations has not catered to the specific requirements of CHT.

Development of critical success factor list

An initial list of factors was devised by the Curtin University researchers based on the academic literature and the expertise of the research team in cultural heritage tourism. The list derived from the literature was used as the basis for interviews with CHT managers and stakeholders. To ascertain the character and breadth of existing published knowledge relating to CHT and how this related to the issues identified in the critical success factors devised, a list of 284 annotated cultural heritage tourism references was analysed for themed content. A text search using key words enabled a count of documents addressing each of the respective success factors. This provided an indication of the proportion of publications represented by each success factor.

Site visits and interviews

A series of site visits and interviews with stakeholders was conducted over a four month period in 2006 across three states (Western Australia, Victoria and Tasmania). Specific sites included a range of cultural heritage types from the post colonial era such as convict, mining, industrial, rail and monastic (see Table 1). Interviews were used to develop and refine the key success factor list based on the practical experience of a range of managers and government stakeholders. An element of validation was inherent in this process where the most recent version of the developing list was used in successive interviews with CHT site and operational managers and state heritage and conservation agency representatives. The success factor list was further validated by circulating the revised list back to the managers previously interviewed, requesting further comment.

Key Findings

Critical Success Factors

Key Success Factors identified from the literature and in discussion with stakeholders were as follows. They are in no specific order of importance but reflect a logical approach to the sequence of steps required for setting up a new cultural heritage tourism operation.

Agreed objectives and clear concepts

Relates to the need for clear objectives for the heritage place, agreed upon and supported by key stakeholders, and development of coordinated tourism product concepts that balance both conservation and business needs.

Financial planning for budgeting, capital raising and price setting

Finances are central to the viability of the heritage place as a tourism product and focus for conservation. Requirements for adequate capital, access to grants and other sources of funding and the need for careful budgeting and financial planning are essential for continued success of an operation.

Effective marketing strategies based on sound market research

An effective marketing strategy is necessary for tourism success and is highly dependent on market research and other key success factors, including objectives and clear concepts and financial planning.

Destination and proximity to major markets and visitor flows

Several aspects were considered important including: suitable relationship to destination image and branding; adequate accessibility, visitor flows, market proximity and transport access; and proximity of other nearby businesses (clustering).

Human resource management, including paid staff and volunteers

Operations approached typically relied heavily on volunteers and part-time staff. Many may have expertise in (or passion for) the heritage in question rather than experience in tourism services and the management of commercial ventures. A range of skills, from conservation through to business skills, was considered ideal for success. There are specific issues associated with volunteers including training, coordination, rewards, recruitment and succession.

Planning for product differentiation, life cycles and value adding

Addressing aspects of uniqueness and differentiation is important as heritage identified for its conservation value may not translate into a viable tourism product. Alternatively, it may be necessary to break down the tourist perception of 'seen one historic house/bridge/town, seen them all'. Adding value through new experiences and/or increasing the yield may increase revenue.

Quality and authenticity of products and experiences

In this tourism product development context, quality referred primarily to the quality of the experience. Quality of experience relates to the appeal, intellectual challenge and raised level of visitor interest. Experienced quality is relative to price, the expectations of visitors and comparisons with similar ventures. It therefore combines the need for quality heritage presentation with provision of quality services.

Authenticity is a core value in heritage conservation and the tourist experience. It may be defined by the relationship between the practitioner and visitor conceptions of historical accuracy combined with visitor perceived entertainment value and how they make sense of the past.

Engage cultural heritage and tourism expertise in conservation and promotion

Successful cultural heritage tourism requires a balance between commercial imperatives and the conservation of a suite of heritage values including historic, archaeological, architectural and aesthetic significance and the significance of the sites to associated communities.

Design interpretation as an integral part of the heritage tourism experience

Interpretation provides meaning and understanding for the visitor. It is a central part of the visitor experience of cultural heritage and has significant ramifications on the quality and authenticity of a cultural heritage product. Effective interpretation requires knowledge about the heritage being presented, expertise in communication and interpretive design and the ability to create an effective interpretation plan.

Recommendations

- A greater focus on financial planning and human resource management within the specific context of cultural heritage tourism is required to address some of the more practical aspects of CHT operation.
- Develop a manual or 'how to' guide for developing and improving cultural heritage tourism operations based on further development of the concepts and information in this report.
- Given the high rate of CHT operation failure, the manual could include an initial preliminary assessment tool similar to the STCRC Farm and Country Tourism Tool Kit for locations seeking to develop or commercialise a CHT experience.

Future Actions

This report identifies the specific key factors associated with successful cultural heritage tourism operations and highlights the gaps in knowledge available through the heritage literature. It forms the basis for the development of guidelines for use by those seeking to develop cultural heritage tourism operations or improve existing operations. Further funding is required to develop material in this report into an industry friendly manual. This would provide a detailed guide for development of cultural heritage tourism operations, currently not available to would-be operators.

Chapter 1

INTRODUCTION

Heritage is a broad term applied to a range of things, places and practices which we value and wish to conserve for future generations. Heritage places are most commonly the focus of conservation efforts and tourism interest. These are often divided into two broad categories of cultural and natural heritage, though there is increasing recognition of the connections between these two elements. In Australia, cultural heritage is further divided into Aboriginal and Torres Strait Islander heritage, and heritage dating to the period after colonisation. This project is part of a broader heritage tourism research strategy concerned with cultural heritage dating since European contact with Australia. Cultural heritage is valued both as a point of reference and identity within a given community. It is also a potential source of income through tourism. Consequently, conserving cultural heritage is important in terms of both the significance to the community that identifies with it and the ongoing potential for tourism it may generate. Cultural heritage tourism presents an opportunity to generate revenue while raising awareness of the significance of heritage. Understanding the requirements for ensuring conservation goals are met while tourism enterprise potential is maximised is vital to the successful management of cultural heritage.

Unfortunately, there is currently a high failure rate amongst cultural heritage tourism operations. This probably relates to the strong focus on conservation and prevention of over-commercialisation, while business and marketing knowledge and skills are generally lacking in this sector. In addition, the literature in cultural heritage tourism includes debates over the less tangible issues of authenticity and commodification in cultural heritage tourism. Thus CHT operators may have difficulty accessing practical business operation-related knowledge particular to the sector. To partly address this issue, the Australian Heritage Commission published a report titled: *Successful tourism at heritage places: a guide for tourism operators, heritage managers and communities*. However, this only provided very general advice regarding the need for business skills as it was written for a broad audience and sweep of heritage types. Furthermore, being in possession of adequate business skills does not equate with success in cultural heritage tourism enterprises.

The limited (though growing) literature addressing the issue of operating successful cultural heritage tourism enterprises indicates several other requirements for success. These include:

- understanding market supply and demand
- having clear objectives
- having the ability to meet visitor needs and expectations.

While the basic business skills are a generic requirement of any enterprise, the remaining factors are based on knowledge and skills specific to cultural heritage tourism. This information is dispersed across a range of publications and articles. It is apparent that cultural heritage tourism enterprises would benefit greatly from a collated specific set of guidelines to aid in their success.

This project identifies the critical factors for successfully balancing viable cultural heritage tourism enterprise with heritage conservation goals. A range of case studies from the attractions, accommodation and tour operations sectors inform the guidelines, such that they have broad industry relevance. A thematic analysis of the cultural heritage tourism literature provides a quantitative measure of where the focus of research lies and what gaps are apparent.

To ensure the success factor list related to a broad range of CHT operations in Australia, a range of cultural heritage tourism places and experiences were approached. Managers of these sites and associated government stakeholders were interviewed as part of the success factor list development. The sites, locations and associated CHT focus are listed in Table 1. In addition to visiting heritage places, representatives from relevant government agencies were also interviewed to gain insight into broader issues beyond individual operations. The agencies were approached owing to their direct involvement in management of heritage places. Relevant agency representatives were interviewed in each state as follows:

- Heritage Victoria
- Parks Victoria
- Tourism Tasmania
- City of Albany
- Port Arthur Historic Site Authority

Success Factors in Cultural Heritage Tourism Enterprise Management

The direct practical experience of CHT operation managers enabled expansion and refinement of the success factor list derived from the published literature. Some of the success factors may relate to tourism operations in general while others were more specifically associated with cultural heritage and tourism development. The combination of literature sources and input by practitioners was intended to create a comprehensive and directly relevant list of success factors found to be common across a range of CHT operations.

Presentation of the key success factors is in two forms. Chapter 4 provides a description of each success factor. Associated operational issues are provided with some examples. This is followed by bullet points relating to actions CHT enterprises have taken toward incorporating the success factors into their business operations. Chapter 5 presents descriptions of each of the CHT enterprises visited as part of the project. This is followed by a list and description of the success factors apparent in the respective operation of each enterprise. The outcomes are of interest to government agencies and heritage tourism operators in the public and private sector.

Table 1: Heritage places, types and locations included in visitation and interview schedule

Heritage Place Visited	Heritage Type	Location
VICTORIA		
Victorian Goldfields Railway	Industrial, transport	Maldon
Buda Historic Homestead	Mining/colonial	Castlemaine
Old Castlemaine Gaol	Mining/colonial	Castlemaine
Castlemaine Diggings National Heritage Park	Mining	Castlemaine
Sovereign Hill	Mining/colonial/re-created	Ballarat
TASMANIA		
Port Arthur Historic Site	Convict/penal	Tasman Peninsula
Cascades Colonial Accommodation	Convict/penal	Tasman Peninsula
Woolmers Estate	Agricultural/convict/colonial	Longford
Brickendon Estate	Agricultural/convict/colonial	Longford
WESTERN AUSTRALIA		
Benedictine Community of New Norcia	Monastic/missionary	New Norcia
Whale World, Albany	Industrial, whaling	Albany
City of Albany	Military/convict	Albany

Chapter 2

LITERATURE REVIEW

Much of the public focus on heritage in Australia has been on buildings and sites. However, while cultural heritage may include tangible aspects, such as buildings, memorials and landscapes; there is an increasing recognition that it also includes the intangible such as cultural practices, oral traditions, events, music, cuisine and knowledge (Heritage Council of Western Australia 2005: , McKercher and duCros 2002). Tangible aspects of cultural heritage present obvious focal points for tourists and may afford a desirable experience simply through their physical presence. Accessing intangible cultural heritage arguably requires a more complex interaction between a visitor and a place centred on socialisation with the resident population and/or some level of engagement with local traditions and cultural practices. In a sense, the aesthetic appeal of tangible cultural heritage may passively function to 'attract' tourists. That is, tangible heritage may function independently as a tourism pull factor on which additional tourism activities may be built. Establishing intangible heritage as a tourism experience, excepting major cultural events, perhaps requires greater effort in developing such heritage into a tourism product. The obvious physical appeal and accessibility of tangible heritage lends itself more readily to the tourist gaze while intangible heritage requires greater effort on the part of the tourist and 'host' to expose its significance. The conservation issues are markedly different in each instance.

Though sometimes used interchangeably, it may be that *heritage tourism* and *tourism at heritage places* are quite distinct concepts. The existence of heritage is no guarantee that there is sufficient demand for its consumption by tourists (Ashworth and Tunbridge, 2000). Tourists at heritage places could be utilising the heritage as a pleasant atmosphere or background for engaging in other tourist activities, such as shopping, eating and relaxing (Cigielski, Janeczko, Mules and Wells, 2001). In this context, the cultural heritage is not the central focus for visitors and thus, any attempts to develop an experience focussed on heritage may not succeed. It is important to recognise whether the presence of tourists at heritage places is motivated by cultural heritage or not, in order to effectively guide tourism development and allocation of resources within a location.

It has long been recognised that tourism generates commercial activities that may positively influence local economies (Dwyer, Forsyth and Spurr 2004). Heritage tourism may result in revenue associated with the tangible or intangible assets directly (entry fees, guided tours, events) or revenue from spending on linked activities (shops, cafes, accommodation). In many cases revenue may also come from a third party. A common instance of this is government providing grants or ongoing subsidies for conservation planning or works on significant (and public) heritage sites. The interaction between tourism and heritage promises mutual benefits. Tourism presents an opportunity to generate revenue while raising awareness of the significance of heritage. Operating a successful cultural heritage tourism attraction requires both knowledge of the conservation needs and sound business practice. Conserving cultural heritage is important in terms of both the significance to the community that identifies with it and the ongoing potential for tourism cultural heritage may generate. The increased economic activity that may precipitate from successful heritage tourism is particularly important in rural Australia, where restructuring in agriculture and associated services has resulted in an economic and social decline. Development of tourism may afford a boost to local economies with associated social benefits (Knowd, 2001; Prideaux, 2002; Seaton, 1999).

While affording potential positive influences on a region, heritage tourism may also have significant problems associated with it. Commodification and authenticity are two problematic issues linked to development of tourism products based on cultural heritage. While outside the scope of this study they are worth briefly mentioning. From the perspective of heritage conservationists, commodification of heritage is generally negatively viewed as a paradigm in which authenticity is devalued and conservation replaced by the profit-motive. Altering the focus from conservation to profit making leads to concerns about physical impacts on often fragile, non-renewable resources. Major critics of commodification include Hewison (1987) and Lowenthal (1998). In turn, some researchers argue that commodification is not necessarily destructive of authenticity (see in particular Cohen, 1988). Authenticity is discussed further in the Chapter 4 description of critical success factors. Commodification may act to strengthen cultural identity through popularisation and promotion of cultural legitimacy, particularly when being driven from within a community with a view to achieving such aims (Halewood and Hannam, 2001). However, an extensive literature argues that when cultural heritage becomes a commodity for sale to tourists, there is pressure to reshape that heritage to better fit the consumer demand. It also tends to become rigid and fixed and unable to function in its original cultural context.

Research relating to cultural heritage tourism operations indicates a generally poor level of performance. Cultural heritage developments are highly likely to be under threat, causing dissension or requiring rescue packages (Bramley, 2001; Davidson and Spearritt, 2000; Fallon and Kriwoken, 2003; Frost, 2003 & 2005A; Leader-Elliott, 2005; McKercher, 2001; Prideaux and Kininmont, 1999; Young, 2006). This may relate to an underlying focus on conservation and concern for avoiding over commercialisation with conservation focused management and a resultant lack of visitor focus (Gyimothy and Johns, 2001). Ho and McKercher (2004) used examples from Hong Kong when explaining the high risk of failure in cultural heritage tourism developments. They identified four key factors associated with unsuccessful attempts to develop cultural heritage tourism at various sites in Hong Kong. These were comprised of:

- heritage managers having a lack of understanding of market expectations in relation to the nature of experiences of heritage sites;
- a lack of assessment of the tourism potential of a site in terms of 'attractiveness' and carrying capacity;
- an absence of site management objectives and priorities in delivering a tourism experience; and finally,
- a lack of connection between management of a site as a heritage asset and development and promotion for tourism.

What these factors primarily point to is a general lack of skills and understanding in relation to tourism product development, the market and marketing on the part of cultural heritage site managers in Hong Kong.

In terms of successful attempts at site based cultural heritage tourism development, Mattson and Praesto (2005) listed a number of factors in relation to development of a medieval Scandinavian heritage site. These factors included: uniqueness and 'charisma' of the built aspects of the site; development of a fictional character ('Arn') to create an engaging personal story; links to popular culture such as movies (*Lord of the Rings* and *Harry Potter*); and the presence of well known individuals acting as ambassadors for the site. Uniqueness may be inherent in the physical structure and setting of a site (such as The Great Pyramids or the Sydney Opera House) but uniqueness may also manifest through the manner in which (even commonly occurring) built heritage is presented to visitors as an experience. The development of links to popular culture and creation of a story based on a fictional character in Mattsson and Praesto's (2005) case study reflect an understanding of market demand and marketing, centred on effective interpretation of the heritage site, absent in the Hong Kong example.

Gyimothy and Johns (2001) cited examples of successful and unsuccessful cultural heritage tourism operations in the UK. The Scotch Whiskey Heritage Centre in Edinburgh was discussed in terms of its application of interactive technology to create unique, exciting and informative experiences. While this serves as a significant pull factor, it relies on high yield from visitation owing to significant costs in installation and maintenance of equipment. The seventeenth century reconstructed manor house in South Wales, Llancaiach Fawr Manor, highlights the importance of staff training and management. The manor house is a restored Tudor mansion with replica furnishings and costumed actors designed to provide an authentic experience of seventeenth century Wales. The experience of authenticity is also enhanced by placing the tourist facilities at some distance from the house while information about the historical background is provided before entering. The aim is to immerse visitors in the experience of seventeenth century Wales. Considerable time and effort is put into training staff who are recruited from local catchment areas. Staff are also rotated through different roles to provide them with a holistic view of the operation and how their main role 'fits' into the bigger picture. The staff is comprised of interpretation staff, catering and administration. Volunteers are also encouraged and undergo a similar training process to the staff. All staff are provided with wider training in customer care and related areas to provide a consistency of quality standards for visitors. These examples highlight the importance of innovative and engaging interpretation, comprehensive staff training and management and site layout as significant factors in success of the cultural heritage tourism operations.

Given that cultural heritage tourism development arguably represents a unique combination of commercial business and cultural 'property' often verging on sacred, it is important to identify key business success factors which heritage managers may adopt. A limited, though growing, literature indicates five possible approaches. These include:

Basic business skills

The Australian Heritage Commission (2001) emphasised the need for basic business skills, particularly strategic planning, a significant factor also identified by Ho and McKercher (2004). However, the adoption of a business plan is not in itself a guarantee of success. Indeed, in some cases it has been specifically noted that troubled attractions had professional business plans (Frost, 2003).

Understanding market demand

Overestimating market demand for a particular cultural heritage experience may often be a fatal flaw during the planning and development stage (Bramley, 2001; Frost, 2003 & 2005B). Studies of the failure of non-heritage attractions in Australia have also noted this as a significant factor (Beeton, 2005; Leiper, 1997). It is therefore important to identify a market for the cultural heritage tourism product being planned and an understanding of the character of that market.

Having clear objectives and a unified approach

Having stakeholder agreement on objectives is vital to the success of an attraction. Confusion of concepts and objectives may result in inefficient operation or inappropriate decision making. An example of such confusion is where some stakeholders expect a project to run at a profit, whereas others expect it to be subsidised. There are indications that heritage, by its very nature, is prone to such a problem given the often high costs of maintenance combined with limited revenue.

Understanding the status of market supply

While there may be a demand for a particular type of cultural heritage experience, it is also important to target gaps in the market supply. In many cases there may simply be a glut of heritage attractions, meaning successful entry into the market may be difficult. A number of writers have expressed their concern that the supply of heritage may have out-stripped demand (Ashworth and Tunbridge, 2000; Hewison, 1987; Johnson and Thomas, 1995).

Ability to meet visitor needs and expectations

The fifth approach contrasts market-orientation with product-orientation (Lade and Jackson, 2004). Though developed for events, this concept is seemingly also applicable to heritage. It argues for a greater focus on the visitor, particularly their needs and expectations. This may be particularly pertinent for cultural heritage where the primary focus of operation is often on conservation of cultural items rather than service to visitors.

The aforementioned discussion and examples provide comment on some factors associated with successful and unsuccessful cultural heritage tourism development. Much of the discussion in cultural heritage tourism focuses on issues associated with conservation, authenticity and commodification. While there are a small number of case studies on the viability of specific heritage attractions in Australia, including studies of Halls of Fame (Bramley, 2001), Old Sydney Town (Davidson and Spearritt, 2000), Coal Creek (Frost, 2002) and the Australian Football League Hall of Fame (Frost, 2006), further research is needed to gain understanding of critical success factors associated with business planning. Furthermore, there needs to be an examination of whether these critical success factors are generally similar to those for most tourism operations. It may be that there are factors intrinsic to heritage tourism which need to be known, understood and incorporated into the planning of these operations.

Chapter 3

METHOD

This project sought to define a list of critical success factors associated with the operation of cultural heritage tourism places and experiences. A grounded theory approach was used in this study. That is, ideas evolved through the research based on the results obtained from interviews and the literature. A review of the literature was used as the starting point for formulating a basic framework of issues to guide interviews with operators. The success factor list evolved through successive interviews across a range of cultural heritage tourism operations. The developed list was used as the basis for quantitative analysis of the literature to identify gaps in published knowledge.

Development of Success Factor List

An initial list of factors was devised based on the academic literature in cultural heritage tourism. The list derived from the literature was used as the basis for interviews with CHT managers and stakeholders. A series of site visits and interviews with practitioners and managers was conducted over a four month period in 2005 across the three states (Western Australia, Victoria and Tasmania). Interviews were used to develop and refine the key success factor list based on the practical experience of a range of managers and government stakeholders. Comments in each successive meeting were used to review and modify the success factor list. An element of validation was inherent in this process where the most recent version of the developing list was used in successive interviews with CHT managers. The success factor list was further validated by circulating the revised list back to the managers previously interviewed and requesting further comment.

Thematic Analysis of Cultural Heritage Tourism Publications

To ascertain the character and breadth of existing published knowledge relating to CHT and how this related to the issues identified in the critical success factors devised, a list of 284 annotated cultural heritage tourism references was analysed for themed content. The reference list was sourced from the Centre International de Recherches et d'Etudes Touristiques (CIRET) and comprised refereed academic manuscripts and official reports across seven languages published between 1989 and 2005. CIRET actively gathers and catalogues tourism related publications using a standardised 'theme word' association process. Each published document obtained by the organisation is assigned one or more theme words according to its content. CIRET standardises classification of publication through use of a thesaurus of 1300 words reflecting possible themes in tourism research. Publications are individually read and an annotated reference list entry generated that includes categorisation by one or more of the CIRET theme words (Baretje, 2006). The references provided to the authors had been categorised against the theme 'cultural heritage' in addition to other tourism related theme words. The database may not include other heritage literature outside the tourism field.

A text analysis software package (NUD*ist 6) was used to conduct text searches of the standardise theme words used to categorise the 284 references. The reference list supplied by CIRET was imported into NUD*ist to allow a text search to be conducted. Each reference notation in the imported list was defined as a single 'text unit'. The CIRET thesaurus was used as a source for search terms to analyse the reference list. This ensured that all search terms used in the analysis may have also been used by CIRET to categorise documents in the list. 'Theme words' from the thesaurus were selected as search terms based on association with the key success factors identified in the literature and interviews. Theme words associated with success factors either in terms of direct similarities in meaning, or identified as sub-meanings were used as search terms. Table 2 lists the 133 theme word search terms found in the thesaurus that were related to the nine key success factors. Some of the terms have been grouped based on similar meaning (such as tax and taxation) or similar topic (such as demographics, sex and age). Grouped terms are identified by separation with a forward-slash (/). Search terms under each key success factor are listed in alphabetical order.

The word search was conducted in a manner that enabled the software to specifically target where the terms were used as theme word classifications and ignore incidental occurrences in titles, affiliations or other parts of the reference details. The number of 'text units' found with the matching theme word used in the search equated to the number of documents that addressed the given theme within a sustainable tourism context. The software also 'coded' references in the list according to the theme word matches. Each theme word was entered into the

database as a 'node' linked to the specific references that had been assigned with the given theme word. Each theme word node provided access to both the number of references (or 'text units') and a detailed list of the references assigned the given theme word. Most of the publication references were assigned multiple theme words and therefore were coded against multiple nodes. Nodes could be grouped in a relational tree according to broader categories, for example theme word nodes such as 'finances', 'cost-benefit' and 'revenue' could be grouped under the success factor, 'financial planning'. In this way, the total number of documents in the reference list associated with specific theme words and success factors could be ascertained.

The focus of published knowledge and research effort in cultural heritage tourism was analysed using 133 search terms derived from the same CIRET thesaurus used to categorise the 284 documents included in the analysis. The search terms were not divided equally among the key success factors. However there was no apparent subsequent association with the number of documents found to be linked to a success factor and the number of search terms associated with it. For example, 'Quality and authenticity' had seven search terms associated with it (all of which were used within the reference list analysed) and was linked to 147 publications. 'Financial planning' had 24 search terms associated with it (eight of which were used in the reference list analysed) but was linked to only 15 published documents. Documents in the reference list may have one, several or more theme words allocated to them by CIRET across a number of success factor categories. It should be noted that this analysis focuses on the quantity of the publications associated with the various success factors. There is no indication of quality of work. In essence, this analysis indicates a measure of the research focus and publication effort but does not indicate impact of the work published on the subject of interest. Table 3 summarises the results of the analysis.

The majority of the literature appears to focus on two of the nine key success factors for cultural heritage tourism development. The 'Quality and authenticity' factor was associated with about half of the publications. The dominant search term within this factor was 'Conservation' (98 documents). The search terms 'Authenticity' (39 documents) and 'Product' (36 documents) were a distant second in frequency. This result perhaps represents a component of the commodification issue. Development for tourism may be perceived as a means for corrupting authenticity and lowering conservation values from the heritage conservation perspective. It would seem that the cultural heritage tourism literature is dominated by discussion regarding the issues surrounding conservation of heritage (such as minimising negative impacts) and its use as a tourism product.

Results of the analysis also suggest a relatively high frequency of published documents associated with the factor relating to 'Objectives and concepts' (48.6% of publications). This includes publications relating to the conservation versus commercialisation agenda, political and social aspects of cultural heritage tourism operation and stakeholder collaboration. There were three dominantly occurring search terms within the 'Objectives and concepts' factor: 'Commercialisation' (57 documents); 'Politics-policy' (33 documents) and 'Host community' (27 documents). The focus on these key search terms reflects the tension between conservation of heritage for its significance to community versus commercialisation for tourism business purposes, or commodification of heritage. While obviously a significant area of discussion, negative perceptions relating to commodification may stymie successful development of cultural heritage tourism products.

The analysis indicated that 'financial planning' (5.3% of publications) and 'human resource management' (7.7% of publications) were among the least frequent factors addressed in the literature. This is of interest particularly in the light of interviews indicating most CHT managers were concerned with obtaining adequate funding for ongoing maintenance and operation costs. The Australian Heritage Commission (2001) emphasised the need for basic business skills, particularly strategic planning, as a significant success factor. Ho and McKercher (2004) highlighted the need for a connection between management of a site as a heritage asset and development and promotion for tourism as a significant factor determining success or failure of CHT businesses. Thus, while generic business start-up and operation related information is available outside the heritage tourism literature, the unique character of CHT operations (balancing conservation and commercialisation) would suggest the need for tailored sources of knowledge in addition to generic business skills development information. It would appear that this is an area significantly lacking.

The low frequency of documents relating to interpretation of heritage (14.8%) was also of interest considering its centrality to the heritage tourism experience. Given the significant intangible component to cultural heritage, communication is often the only means of access for tourists. The relatively low frequency of documents addressing interpretation may perhaps be a function of the CHT literature primarily focusing on conservation issues. It is also possible to obtain significant information on interpretation outside the CHT literature as the origins of environmental interpretation lie in natural heritage experiences.

Table 2: Theme words from CIRET database thesaurus associated with cultural heritage tourism key success factors

Objectives and concepts	Financial planning	Marketing, market research
Commercialisation*	Accounting	Advertising
Cooperation*	Breakeven point	Attitude*
Cost-benefit*	Budget	Attractivity*
Ethics*	Capital	Behaviour*
Feasibility*	Cash flow	Brand*
Governance	Cost/Price*	Brochure
Host community*	Donation	Commercialisation
Ideology*	Economics/Economic outlook	Consumption*
Joint venture	Entry fee-Fare*	Demarketing*
Law*	Expenditure*	Forecasting*
Partnerships*	Financial management*	Identity
Philosophy	Financing*	Image*
Politics/policy*	Income/Revenue	Length of stay
Private sector*	Input-output	Market segmentation*
Public sector*	Insurance	Market study*
Tourism business*	Interest rate	Marketing*
Tourism product*	Investment*	Marketing mix*
	Loan	Merchandising*
	Profit/Profitability	Motivation *
	Purchasing	Satisfaction
	Security*	Demographics/sex/age*
	Tax/Taxation	Souvenirs*
	Willingness to pay*	Special interest market*
	Yield	
Visitor flows, location	Human resource management	Differentiation, life cycle
Accessibility*	Human resource management*	Added value
Attendance/Bookings*	In-house training	Competition/competitivity
Carrying capacity*	Internal audit control*	Development*
Clustering	Knowledge management	Diversification*
Competition	Leadership	Life cycle*
Congestion	Organisation administration*	Novelty*
Decision choice*	Recruitment/Employment*	Popularity
Demand/Supply*	Staff*	Refurbishment
Destination*	Volunteer/Volunteerism	Revitalisation*
Flow		Specialisation
Quality, authenticity	Expertise: conservation, promotion	Interpretation
Authenticity*	Conservation management*	Communication*
Conservation*	Impact management*	Interpretation*
Product*	Promotion*	Visitor education*
Quality*	Architecture*	Entertainment*
Welcome, reception*	Archaeology*	Enjoyment*
Certification*	Anthropology	Interpreter/guide*
Visitor experience*	Curator	Knowledge*
	Expert	Enhancement*
	Consultant	Exhibition*
		Signs
		Theme

*Search terms found as matching those used to categorise heritage tourism references in CIRET bibliography

Table 3: Number and proportion of documents associated with key success factors in cultural heritage tourism reference list based on theme word search

Key Success Factors		
Quality and authenticity	147	51.8%
Objectives and concepts	138	48.6%
Expertise in conservation and promotion	87	30.6%
Marketing and market research	65	22.9%
Visitor flows and location	55	19.4%
Differentiation, life cycle, value adding	51	17.9%
Interpretation	42	14.8%
Human resource management	22	7.7%
Financial planning	15	5.3%
<i>Total No. Documents Analysed</i>	<i>284</i>	

Note: As any given document may have addressed more than one critical success factor, the number of publications across all factors totals to more than 100%.

Chapter 4

DESCRIPTION OF CRITICAL SUCCESS FACTORS

There are many studies and examples of why tourism businesses fail (for example, Bramley, 2001; Davidson and Spearritt, 2000; Fallon and Kriwoken, 2003; Frost, 2003; Ho and McKercher, 2004; Leiper, 1997). Such examples provide important information on what not to do but may not be specific in terms of the most effective means for success. The following list aims to provide guidelines regarding what to do in terms of successfully developing a cultural heritage tourism operation. These factors have been developed specifically for cultural heritage tourism business development. The success factors incorporate a range of general tourism and business principles as well as factors specific to cultural heritage tourism. While the list of success factors is not in strict order of importance, it is arranged in the approximate order required for initial establishment of a CHT business operation.

The findings from this study are presented in two parts. Chapter 4 provides initial descriptions of all of the identified success factors. Associated issues and examples of management approaches obtained from interviews are listed for each success factor. This is intended to provide a detailed overview of the success factors with referrals to particular places of relevance as described in Chapter 5. The bracketed references to particular sites link to more detailed descriptions provided in Chapter 5. Chapter 5 provides a description of the places included in the research project with identified success factors highlighted for each respective place.

Agreement on Objectives and Clarity of Concepts

Objectives

There need to be clear objectives which are agreed upon and supported by the majority of stakeholders. Such agreement is required to ensure that all stakeholders are working towards the same outcomes. The objectives need to be developed and clearly stated during the process of developing a Strategic Business Plan. This requires a heavy emphasis on consultation with multiple stakeholders.

Heritage tourism operations are usually required to meet the needs of a diverse range of stakeholders. It is common for them to have differing, even conflicting views on heritage and how to present it. This may extend to disagreements on what the community's heritage actually is. Tunbridge and Ashworth (1996) referred to this as *heritage dissonance*, relating it to discrepancies over community identity and who and what values are admitted to represent it. Once an identity based on certain heritage values is broadly agreed on, a major area of concern is balancing heritage and tourism objectives. Some stakeholders may be primarily concerned with conservation, whereas others may have more commercial interests while some may be attempting to balance both. Managers need to be aware of such differences and develop strategies for effectively managing them.

Examples of stakeholders with an interest in setting objectives include:

- owners (public/private/non-profit)
- government (approvals/cooperative marketing/promotion)
- other stakeholders (community/volunteers/national interests/international interests)
- Examples of methods and circumstances for effectively setting objectives are provided in the description of cultural heritage tourism operations and include:
 - business planning (see Old Castlemaine Gaol, Whale World—they have comprehensive business plans)
 - conservation strategy (see Old Castlemaine Gaol, Whale World—they have a clear conservation strategy)
 - needing full-time management/paid staff to achieve objectives(see Buda Homestead and Whale World)
 - board cohesion enhances ability to set objectives and make decisions effectively (see Sovereign Hill with a strong and cohesive Board)
 - strong 'core values' provide a framework for setting objectives (see Sovereign Hill, New Norcia, religious/spiritual life central to location)
 - consistent/clear purpose (see Sovereign Hill, New Norcia, Whale World)
 - positive and supportive Board (see Sovereign Hill)
 - high powered (political) Board with expertise and connections in heritage conservation (see Port Arthur, Woolmers)
 - local community involvement (see Woolmers, New Norcia)

Concepts

Differences in objectives may lead to developments which are conceptually diverse. This may cause confusion amongst potential visitors. It may also waste resources as managers try to chase different, possibly conflicting, market segments.

Attracting visitors requires a clear concept. Visitors will be discouraged if the experience offered by an attraction is unclear. This dissuasion may occur before the visit (for example, if advertising fails to inform precisely what is on offer), or even during a visit (while visitors may even turn away from an unwelcoming or confusing entry point).

For heritage tourism, visitor decision-making may be influenced by expectations and past experiences (McKercher and du Cross, 2002). Certain types of operations might be quite familiar to visitors, potentially triggering feelings of boredom. On the other hand, new concepts (or combinations of concepts) might be viewed with caution.

Clarity of concepts involves consideration of the following issues:

- product—what is it? How to refresh it/add depth/profile/value? This requires consideration of the life cycle stage of a location, i.e. developing versus long established sites.
- authenticity—can be a critical issue for conservation. How is it balanced with tourism development?
- concept mix and solving contested concepts within an organisation—relates to consideration of the target market and projecting a clear image of the development, e.g. Port Arthur has a clear divide between conservation and tourism (Conservation vs. Tourist Park) at every level of the organisation. There is a need to synchronise these concepts to provide a coherent experience for tourists.
- political agenda—e.g. Old Castlemaine Gaol has restricted use owing to layout and laws against modifying heritage buildings to suit alternative uses.

The following examples demonstrate approaches to these issues by various sites:

- Whale World has revitalised itself through restoration of buildings, machinery and has a plan for ongoing value adding (new exhibits, restaurant, accommodation etc.) to its core product.
- Buda Homestead Garden Festival is a successful example of value through extension of existing concepts relating to heritage house and garden. The historic garden theme through the nursery and related events were promoted as separate to the homestead.
- Whale World has a strategic commercialisation plan in place, provides direction for development of a clear concept.
- Authenticity is the primary concept around which tourism is developed. For example, in New Norcia it is important to maintain the Benedictine way of life. The religious/spiritual aspect enhances tourist perception of authenticity who don't want to 'cheapen' experience with 'crass' commercialisation.
- Whale World is attempting to balance significance/importance of whaling industry and heritage with whale conservation issues. It attempts to present objective information with minimal bias—sudden closure of whaling station and whaling heritage is still an important issue in Albany. In New Norcia, some tension exists between maintaining cloistered lifestyle of monks while catering for 70,000 tourists per year.

Financial Planning for Capital Raising and Price Setting

Capital

Successful ventures require sufficient capital for both heritage conservation and their operation as a business. Based on information gathered through the interviews with CHT managers, it appears that ensuring adequate funding for the second purpose can often prove to be problematic. A commonly mentioned reason is that grants are frequently available only for asset expenditure and not for what attraction managers may classify as ongoing expenses, such as maintenance and business operation. For example, the grants listed by the Federal Department of Environment and Heritage (2006) are focused on one-off restorations of heritage places, purchases of heritage items, and one-off development of cultural heritage displays or signs. Similarly, the Community Heritage Grants (CHG) program (National Library of Australia, 2006) provides grant funding for preservation projects for community organisations which collect and provide public access to cultural heritage collections. This situation is evident across a range of grant schemes from the state government to the local government and community level across Australia (Parliamentary Library, 2006). Organisations accessing these grants require a separately sourced budget for ongoing running costs.

Issues associated with accessing adequate capital include:

- Conservation, not business is the primary objective of most CHT operations and can limit ability or motivation to access funds (see Brickendon, City of Albany—heritage places conserved for public good, entry free to some, nominal entry fee for others).
- Business structure (partnership and/or community-owned) can influence the effectiveness of capital raising in terms of skills, organisation and focus.
- Many places are rich in assets but limited by will or ability for sale/security of assets for capital raising (see Woolmers).

Sources of capital can include:

- fundraising and benefactors (see Goldfields Heritage Railway dining carriage; New Norcia courts benefactors to encourage donation of funds for sealing of car parks and other works)
- generous state grants with no conditions (see Port Arthur)
- application for government grants for restoration (see Goldfields Heritage Railway Inc; Old Castlemaine Gaol; Whale World accessing grants for restoration of buildings; New Norcia—large government grants for restoration of chapel).

Financial Controls

Difficulties in budgeting and financial planning are commonly identified. This often manifests in a tendency for attraction managers to over-estimate revenue and under-estimate costs. This may be due to a lack of financial expertise amongst volunteers and staff which cannot be compensated for simply by enthusiasm for a project. The following financial issues exemplify this problem:

- Minimal government support creates difficulty in accessing funds (see Whale World).
- Strong government support acts to ensure access to funding (see Port Arthur, Albany Forts and other Albany heritage sites under council control).
- Heavy reliance on dollar for dollar grants requires valuable time spent on grant applications and fund raising (see Cascades).
- Grants may be obtained for specific projects, but no ongoing government funding for operations (see Sovereign Hill).
- Selling assets to pay for conservation is not always an option (see Woolmers).

Examples of effective financial control practices include:

- careful management of budget and cash flow. It is important to set priorities to enable decision-making and support planning (see Buda, Whale World)
- access to tax concessions for conservation works/donations. Family businesses may have loans as part of other finances (see Brickendon has one business account for tourism and active farm)
- sound financial management systems (Buda, Whale World has ‘a business driven approach’; New Norcia’s Abbot doesn’t like the term ‘business’ but the town is run on sound business principles)
- fund raising themes linked to other projects. Examples are biannual Castlemaine garden festival; the shift to concentrate on one theme and do it well rather than a series of smaller themes (see Buda);. New Norcia wines and dines potential donors and benefactors
- product launches. These generate significant one-off cash injections (see Woolmers, Mercedes car launch), but have to be in keeping with heritage tourism use and interpretation (see Port Arthur)
- long grant lead time for funding. This has to be incorporated into planning and works (see Cascades, New Norcia, City of Albany: Brig Amity precinct Master Plan)
- the use of heritage restoration grants to develop tourism accommodation (see Cascades).

Price Setting

Price setting is a critical aspect of financial planning requiring separate consideration. As with all financial issues, difficulties can arise when over-enthusiasm for a project is combined with a lack of expertise. Price is particularly crucial as it underpins all financial planning. Revenue (and the ultimate success of the venture) is directly related to the price set.

Many problems arise when prices are based on comparisons with other attractions. Enthusiastic managers may believe that they too can charge the same price, without considering the differences between similarly styled projects (which could include location, length of typical experience and time established). Consideration needs to be given to the differential price mix (including adults, children, concessions, groups and locals) which is dependent on the nature of the attraction, destination and likely market appeal. In some cases there needs to be consideration of whether or not to charge an entry fee.

The following issues need consideration in relation to price-setting:

- How are entry fees set? What concessions are offered to seniors? Locals?
- What are the implications for cash flow?
- Is the heritage being under-valued (see Brickendon)?

Examples of approaches used include:

- Overall yield is considered more important than visitor numbers—e.g. Whale World entry fee was set according to what market will accept, complemented with marketing: visitor numbers declined but profit increased.
- Some places emphasise through put of visitors rather than yield. The emphasis is on encouraging visitation rather than profits. Removal of entry fees or nominal entry fees to encourage increased visitation (see Old Castlemaine Gaol, City of Albany). Government managed sites can be subsidised by council rates and grants. Strong community attachment to place and heritage makes use of public funds viable.
- Free entry for locals with guests encourages repeat visitation (see Woolmers, Port Arthur, free entry for Port Arthur locals, discounted annual pass for Tasmanians).

Effective Marketing Strategies Based on Sound Market Research

Market Research

Marketing strategies require strategic market research. This may come through three sources:

- surveys conducted by the venture
- surveys conducted by the local destination marketing organisation (often in co-operation with the local council)
- data collected and disseminated by other bodies (for example, Tourism Research Australia).

The conduct of market research before a venture starts is notoriously unreliable as respondents may not be able to conceptualise the nature of the venture and may tend to indicate ‘motherhood’ support for heritage which is not later translated into actual visits. Yet ongoing market research also comes at a cost which is rarely recognised by heritage attraction managers. This includes the use of resources in collecting, analysing and utilising the data.

Desirable information identified by practitioners includes:

- visitor numbers
- visitor origins
- visitor satisfaction
- target market segments (see Buda—themes were set to attract culturally/socially aware tourists)
- new markets (see Goldfields Heritage Railway Inc—‘driver experience’ gift market, party trains, pre-wedding, Thomas the Tank Engine theme days)
- generation market cycle (see Sovereign Hill—parents who last visited as children bring their children)
- knowledge of changing visitor types, market trends, visitor wants and needs.

Market research practices noted include:

- in-house monitoring of trends in market segments by the operation (see Sovereign Hill—school groups and Chinese inbound markets)
- access to staff with marketing expertise providing a significant advantage (see Woolmers, Whale World)
- differentiating the market, especially gender bias in heritage visitors—for example, encouraging male tourists to visit historic houses and including women and children in interpretation (see Woolmers)
- ongoing and consistently conducted market assessment (see Goldfields Heritage Railway)
- campaigns—Whale World has an ‘aggressive marketing campaign’ and a full time marketing manager with marketing qualifications. Research is based on detailed market analysis and knowledge of visitors to Whale World and Albany region.

Marketing Strategy

The development of an effective marketing strategy is highly dependent on other critical success factors, including:

- objectives
- clear concept
- budget
- price
- market research.

A wide range of marketing strategies and objectives need consideration. Their importance might be influenced by the particular life-cycle stage of a heritage product. For example, a new venture might be aiming to reach potential visitors with the message that they exist, whereas an older venture might be trying to persuade visitors that changes to the experience warrant a new visit. The budget is a major factor in determining the type and scale of marketing strategy adopted.

Marketing strategies identified as effective by practitioners include:

- cooperative marketing between operations and with regional tourism organisations. This enables joint promotion (see Sovereign Hill with Tourism Vic. Melbourne Aquarium; Phillip Island; Great Ocean Road and Ballarat Tourism; New Norcia and local wineries, observatory, arts and craft studios; Buda: 'Central Victorian Treasures')
- commercial partnership marketing (see Relevant Success Factors for Woolmers and Brickendon with Tourism Tasmania in Chapter Five). Commission is high but for small family businesses the marketing exceeds anything they would be capable of or have time for
- cross promoting heritage properties/businesses through regional maps (e.g. Northeast map with partners including Woolmers, Brickendon, Clarendon and a number of antique stores in the Evandale and Longford region)
- direct marketing (see Woolmers, Goldfields Heritage Railway to seniors and kindergartens; City of Albany targeting Perth based baby boomers for a soft adventure holiday)
- use of high quality brochures available at gateways (see Woolmers, New Norcia, Whale World)
- use of the Internet a relatively cheap and globally accessible form of marketing (see Cascades, City of Albany, Whale World, New Norcia)
- accessing new markets such as weddings, workshops, retreats and school camps (see Cascades, Woolmers, Brickendon, New Norcia)
- monitoring market trends and developing strategies for downturns (see Woolmers, decline in coach market replaced with self-drive; Whale World closely tracks market trends)
- using media events to provide market exposure (see Woolmers—Mercedes car launch attracted 35 journalists)
- marketing important events at 'icon' sites e.g. ANZAC dawn service in City of Albany
- commission to accommodation providers for on-selling (see Goldfields heritage railway)
- building depth of product (see Buda theming of presentation every three months—seaside summers: opportunities for repeat visitation and free editorial)
- using related organisations for promotional opportunities (see Buda, cooperation with Castlemaine Historical Society in organising tour groups; Whale World has rural arm of Channel 9 (WIN) as a major sponsor).

Location within the destination and in relation to major markets and visitor flows

There are three main locational aspects to consider:

- relationship to destination. Does the venture fit the image and branding of the destination?
- relationship to visitor flows, market proximity and transport access
- relationship to other nearby businesses. Are there opportunities for clustering or co-operative marketing?

Issues influencing visitor flows and market access identified by practitioners included:

- accessibility convenience (e.g. link between Goldfields Heritage Railway Inc. and V Rail service; Port Arthur has easy coach access but the 'too close' to Hobart factor works against overnight visitors)
- high fuel costs discouraging self drive visitors
- group tour access (Goldfields heritage railway missing out on tour buses—focuses on closer Bendigo VFR market)
- destination image. Tasmania has strong convict heritage destination image (see Port Arthur. Castlemaine has a strong goldfields destination image which may mean other heritage in the location)

appears tangential to the chief brand. For example, houses, gaols and railway may be the focus rather than mining sites. New Norcia has a strong religious image—monastery and monks. Whale World is unique to Albany and its strong whaling heritage.

- clustering. This can create a critical mass of attractions that encourages visitation to a region (see Brickendon and Woolmers). Cascades is in close proximity to Port Arthur; Whale World is close to popular natural attractions and caravan park though some distance from Albany City and 4¹/₂ drive hours from Perth.
- proximity to major markets. Sovereign Hill is classed ‘too close’ to Melbourne; day-trippers accommodated in Melbourne **not** Ballarat. Albany is an overnight stop on major Southwest WA tour loop; New Norcia is on main tour route north to the Pilbara but close to Perth., receives 70,000 visitors per annum but only about 6000 overnight visitors per year
- location in growing tourism regions (see Woolmers, Brickendon)
- use of night tours to keep visitors in the region/attraction (see Port Arthur, Whale World planning nocturnal experiences)
- proximity to other facilities such as accommodation and entertainment in nearby towns and cities (see Port Arthur, Woolmers, Brickendon)
- ‘sea change’ areas. These can change market with professionals moving from the city to rural areas.

Human resource management, including paid staff and volunteers

Heritage attractions typically rely heavily on volunteers and part-time staff. Many of these may have expertise in (or passion for) the heritage in question rather than experience in tourism and the management of commercial ventures. Successful operations require staff with competence in heritage management, business management and customer service.

Issues identified by practitioners included:

- There is difficulty attracting and retaining quality staff in regional areas owing to perceived lifestyle restrictions or reluctance to live in rural areas (see Relevant Success Factors in Chapter Five Port Arthur, Sovereign Hill, Castlemaine Gaol, New Norcia).
- High staff turnover due to drawing power of larger population centres, such as capital cities, can result in loss of knowledge and skills and increased recruitment and training costs.
- Working with family can create tensions between family relationships and business operation. There is a need to differentiate and clearly define roles and revise these over time. This requires succession planning. (see Cascades, Brickendon).
- Wages are the largest expense for organisations. Many additional hours by paid staff are often required (see Woolmers; Brickendon; Port Arthur).

Successful practices identified by practitioners included:

- Employ a dedicated human resource manager to recruit and manage staff (see Sovereign Hill, New Norcia, Whale World).
- Operational staff training increases skill level (customer service, conservation, interpretation etc.) and thus, quality of tourism experience.
- Use of CEDA (work for dole) in selected parts of the site can reduce labour costs though care must be taken in relation to type of work and skill level required (e.g. Gardens but **not** curation). Whale World is spending time repairing and re-doing past work for the dole projects that used inappropriate materials and methods.
- Time can be more important than financial profit in a family business.
- A targeted allocation of limited human resources is needed (see Buda—key ingredient of success is full-time management staff in the nursery and paid staff in marketing).
- Active staff participation in local heritage and tourism associations can strengthen community networks and support.

Volunteers

For volunteers, there are specific issues of coordination, rewards, recruitment and succession. Much research has occurred recently on volunteers at events, but unfortunately little has been undertaken for attractions.

Issues relating to volunteers are as follows:

- Volunteers are an important resource for inexpensive labour and fund raising.
- Volunteers require training and induction.
- New products and experiences can place demands on volunteers (see Goldfields Heritage Railway Inc., ‘Driver Experience’ product adds to revenue but places demands on volunteer time on site).
- Succession—passing on of staff knowledge when volunteers leave (see Sovereign Hill).

- The mix of human capital can involve paid/volunteer staff and work for the dole candidates. Training influences budget. Wages are often the largest expense with full time workforce but paid staff have a full time commitment.
- 'Sea change' areas may bring unusual skill sets to regional areas (specific areas of expertise, marketing, conservation, curation, etc.).
- An ageing volunteer workforce can limit the potential contribution based on health issues, but also has implications for continuity of service (see Woolmers where many of the volunteer silver polishers are over 80 years old).

Approaches both observed and identified by practitioners included:

- philosophy of 'people are the key' (Sovereign Hill has 220 part time, 120 full time and 300 volunteers)
- paid staff preferred by privately owned heritage attractions (see Sovereign Hill, Port Arthur, Whale World, New Norcia) owing to expertise and greater commitment
- using paid staff only (see Port Arthur, Whale World). Problems with volunteers include other demands on time, non-compulsory attendance, skill levels etc.
- heavy reliance on volunteers minimising staff costs (see Woolmers, City of Albany).

Planning for Product Differentiation, Life Cycles and Value Adding

Differentiation and life cycle

Business planning must allow for the differentiation of the product and its life cycle, and it is necessary to plan for changes to renew the experience and encourage past visitors to return. Product differentiation is a key factor for the broad cultural heritage market. Some potential heritage tourism operators mistake the viable product for 'anything old', without addressing aspects of uniqueness and differentiation frequently valued by heritage conservers. This has implications for some of the goals and aspirations of heritage conservation and interpretation. It also has implications for planning, marketing, operations, clustering and other business issues because it is important to break down the idea 'seen one historic house/bridge/town, seen them all'.

Some issues identified by practitioners included:

- There can be tension between tourism impacts and conservation, e.g. Woolmers experiences damage by visitors walking on carpets and touching artefacts and crowds of tourists disrupting the tranquillity/spiritual aspect of New Norcia.
- Tourism services require maintenance and other tasks that are not necessarily sympathetic with property, e.g. Port Arthur is open all daylight hours so mowing, rubbish collection and cleaning happens during tourist visits.

Successful practices both observed and identified by practitioners included:

- periodically refreshing product and experience (see Buda seasonal themes, Albany Waterfront Project, Whale World proposed accommodation and wildlife park)
- re-branding (see Old Castlemaine Gaol, Albany, Whale World)
- future developments and scope for expansion, e.g. new accommodation, new experiences, additional attractions and facilities (see Whale World, Sovereign Hill)
- adoption of Conservation Strategy updated to keep pace with latest techniques (see Port Arthur, Woolmers)
- development of tourism strategy linked to regional and/or state tourism strategy (see Woolmers, City of Albany)
- linking product more strongly to the unique themes of the destination area to achieve differentiation and enable value adding, e.g. Buda and the associated life of the family as not just typical of any country town but as representative of the gold-generated prosperity of Castlemaine; New Norcia's missionary theme but privately owned monastic town with functioning monastery is unique; Whale World is one of only a few ex-whaling stations in world accessible to mass tourism.

Value adding

Additional revenue may be gained by either adding new experiences or increasing the yield on existing ones. However, care must be taken that these do not confuse the concept, alienate stakeholders or eat up scarce resources.

Some issues raised by practitioners included:

- getting target markets right for value added enterprises, e.g. Port Arthur Restaurant is too high end for current tourism market/budget
- economies of local suppliers

- the capacity to re-invent/innovate, e.g. Sovereign Hill Accommodation, Sound and Light Show, Whale World 3D movies in old storage tanks
- maximising time spent at location by visitors, e.g. Whale World increased visitor stay from 1.8 to 3.2 hrs by adding movies and opening a new exhibit.

Successful value adding concepts and practices included:

- Whale World—planned ferry service from Albany City, expanding café/restaurant to cater for larger crowds and increased length of stay
- linking new initiatives with existing ones—e.g. Kitchen garden at Woolmers will be a source of restaurant produce.
- creation of new products (see Buda Heritage Nursery, Woolmers kitchen garden, National Rose Garden)
- additional tours (see Port Arthur, Ghost Tour, Cruise to Isle of the Dead)
- cafés (see Port Arthur, Whale World, New Norcia)
- creative use of heritage spaces, but needs to be in keeping with historic significance and sensitive to conservation issues and other visitor experiences, e.g. weddings at Cascades, Brickendon; Woolmers use of courtyard and historic dining room for Mercedes car launch
- provision of accommodation (see Woolmers, Brickendon, New Norcia, Sovereign Hill)
- private museum (see Cascades, New Norcia)
- provision of bush barbecues (see Cascades)
- gift/souvenir shop with local and appropriate products, both in price and relevance (see Port Arthur, Woolmers, Whale World)
- provision of foreign language guidebooks (see Port Arthur)
- holding special events, e.g. Goldfields Heritage Railway hosts adult and children's birthday parties, railway enthusiasts days and driver experience
- use of heritage 'brand', e.g. the success of New Norcia Bakery breads and olives, with future plans to produce an Abbey Ale.

Quality and Authenticity of Products and Experiences

Quality

In this tourism product development context, quality is determined as referring primarily to experienced quality. This relates to visitor perceptions of the cultural heritage tourism product in terms of the appeal, intellectual challenge and raised level of visitor interest. Experienced quality also encompasses associated experiences such as catering, cleanliness of toilets and ease of parking among others (Gyimothy and Johns, 2001). Experienced quality is relative to price, the expectations of visitors and comparisons with similar ventures. The quality of heritage products and experiences influences visitor satisfaction, which flows through to repeat visitation and word of mouth marketing.

One of the most important determinants of quality is interpretation, which is considered separately in this report. The following issues relate to quality and authenticity of heritage products and experiences.

Issues for consideration include:

- design and presentation of interpretation
- amenities provision
- too many tourists can detract from quality of experience (see New Norcia)
- managing experience to minimise visitor site impacts
- standardising the quality of the experience to provide a consistent and reliable tourism product over time.

Successful practices included:

- focusing on obtaining visitor feedback (see Sovereign Hill, Whale World)
- recognising product driven by value and interpretation (see Sovereign Hill, Whale World)
- theming of exhibits (Buda)
- careful adherence to authenticity (see Port Arthur, Woolmers, Brickendon, New Norcia).
- accommodation not necessarily standard hotel style, but offering a unique quality experience.

Authenticity

Authenticity is a core value in heritage conservation and can be central to tourist experience (McKercher and du Cros, 2002). Authenticity in heritage also depends on a product that is fragile and non-renewable. Authenticity from a conservation management perspective may mean being as historically accurate as possible in the scientific representation of historical events and artefacts.

In a tourism development context, the tourist plays an active role in the experience of heritage, rather than simply being a passive recipient of historical knowledge. As a tourism experience, it is important to recognise that visitors are not only seeking knowledge but also enjoyment through interacting with the past. The danger of presenting statically preserved genuine artefacts and dry knowledge is in the disconnection and disinterest visitors may feel in experiencing an 'in vitro image of the departed past' (Gyimothy and Johns, 2001, p. 249). It would seem that authenticity relates both to the representations of the past combined with visitor perceptions of authenticity and how they make sense of the heritage experience.

Observed issues and those identified by practitioners included:

- Too many visitors can have an impact on authenticity of visitor experience—both in terms of material conservation, but also impact on atmosphere (see Port Arthur, New Norcia).
- Artefacts not part of heritage site can be disappointing (see Port Arthur).
- Costumes/recreation can be valued by visitors, but can detract from authenticity in the view of heritage conservationists (see Sovereign Hill, Port Arthur).
- Opening all daylight hours has implications for services such as maintenance, mowing, garbage collection etc ... impinging on the visitor experience (see Port Arthur)
- Elaborated and 'exciting' but inaccurate interpretations contradict agreed goals/messages (Ghost tours at Port Arthur).

Successful practices included:

- Real stories/people/connections with the property (see Port Arthur, Brickendon, Woolmers, Cascades, Whale World, Albany Forts, New Norcia).
- Products sold are locally made and relevant (see Port Arthur, Woolmers, New Norcia long life bread)
- Meals can be themed with heritage.
- Accurate selection of funding programs which are consistent with goals for authenticity and quality determined by cultural product managers is needed.
- Whale World attempting to avoid bias in presentation of whaling history and whale conservation – 'present the facts' so 'people make up their own minds'.

Cultural heritage and tourism expertise in conservation and promotion

Successful cultural tourism depends on achieving a balance between commercial imperatives and a suite of heritage values including historic significance, archaeological value, architectural and aesthetic importance and the significance of the sites to associated communities. Proficiency in areas such as marketing, financial management and alliance building are therefore equally important to those required for cultural interpretation and conservation. Through lack of funds and failure to recognise the importance of expertise required, community cultural tourism projects often depend solely on local volunteers and enthusiasts to meet all the challenging requirements of effective heritage tourism management. It is clear that communities benefit when appropriate planning time and resources are directed to identifying and filling key expert roles both from inside and outside local boundaries.

Access to heritage conservation expertise has a number of benefits for the success of a cultural heritage tourism business including:

- assistance with access to grants
- conservation skills and connections
- meeting statutory requirements

Some issues identified by practitioners included:

- Location, finances and management determines access to expertise, e.g. Port Arthur draws a body of architects and conservators to the region that also work for smaller organisations like Cascades.
- Expertise is relative to the scale and scope of the cultural heritage tourism operation, e.g. where there is a board of management, the board should include a cultural heritage conservation representative (see Woolmers, Port Arthur).
- Difficulty exists sourcing assistance and relevant heritage information (see Brickendon).

- A lack of professionals on boards can limit ability in terms of conservation and business operation (see Goldfields Railway).
- Long lead time on conservation works requires forward planning.
- Volunteers might have relevant skills but need to be registered/approved, e.g. the piano tuner at Woolmers.
- Success often requires sheer hard work and commitment (see Cascades, Whale World).

Some successful practices included:

- being part of formal or informal networks that share information and resources (see Whale World employ part time archivist).
- identifying key gaps in expertise for which funding is given (Buda bought in a marketing expert but relies on volunteer expertise from professional seachangers in the garden and planning areas).
- revision and implementation of conservation plans (see Woolmers, Albany).
- building working relationships with other organisations, e.g. National Trust (see Woolmers, Jaycees and Whale World).
- engaging skilled heritage architect to assist with restoration (Cascades)
- accessing pool of skills from stakeholders (builders/architects/planners). Whale World employs skilled tradespersons to maintain and restore buildings on site. Modification to buildings (installation of mezzanines, displays walkways etc.) are done with a view to being able to return building to its original state.

Interpretation as an integral part of the heritage tourism experience

Interpretation provides meaning and understanding for the visitor. It is **the** major part of the experience for visitors to heritage attractions. Visitors generally want to learn about the site and enjoy themselves (McKercher & du Cros, 2002). Heritage tourism operators should develop an Interpretation Plan identifying objectives (what messages do operators wish to convey) and strategies. There is a growing literature on methods for creating effective and satisfying interpretation.

While heritage managers provide interpretation, meaning and understanding frequently comes from the interaction between visitors and that interpretation. Managers need to be aware of visitors 'co-construction' of meaning (Chronis, 2005) based on existing values and beliefs. Heritage is often contested or dissonant. Conflict 'is intrinsic to the nature of heritage ... It is not an unforeseen and unfortunate by-product of the heritage assembly process' (Tunbridge and Ashworth, 1996: 21). Good interpretation is provocative and may present multiple historical perspectives (Moscardo, 1995).

Some key issues included:

- Interpretation must be accessible to all markets and based on sound understanding of existing and potential markets.
- Communication methods employed must be appropriate to the experience and the market needs (audio-visual, guiding, signage, story boards, costumed interpreters).
- Interpretation can be a means of influencing tourist behaviour at the site, e.g. directional signs, site design (pathways, barriers), media listing options for activities (e.g. timetables, location maps).

Successful practices included:

- avoiding physical impingement on experience through minimal use of signs, e.g. Buda Homestead was concerned by balancing need for interpretation with overly formalising the presentation and destroying the unstructured experience of history provided by the house
- use of 'strangeness reduction' through multi-language signs and interpretation forms that link the past with present understanding (see Sovereign Hill)
- expertise in interpretation. This is key to meeting the needs of targeted audiences, e.g. New Norcia, Whale World and Albany outsource interpretation planning, design and installation to private contractors/consultants to access expertise and ensure quality
- having a larger view of interpretation aims and direction. This can increase cohesion and consistency of messages and media installed over time, e.g. New Norcia has an Interpretation Master Plan that includes landscaping, displays, signs etc. for the entire town that will be implemented as funds allow.
- use of multi-sensory and high tech communication methods. This adds appeal to experience and increases impact on visitors, e.g. Sovereign Hill sound and light show.

Chapter 5

CULTURAL HERITAGE OPERATIONS AND ASSOCIATED SUCCESS FACTORS

This chapter describes each Cultural Heritage Tourism (CHT) operation included in the research project together with an overview of associated success factors. The sites are grouped by Australian state starting with Victorian operations, followed by Tasmanian operations then Western Australian operations. The success factors referred to for each operation are cross referenced in the Chapter 4 success factor descriptions.

Victorian Cultural Heritage Locations

Castlemaine Diggings National Heritage Park

Castlemaine is a mid-size country town, 110 kilometres northwest of Melbourne. It has a population of about 8000 and is a mature tourist destination. The town contains shops, cafés, accommodation, galleries and historic attractions (including a steam railway). Much of the appeal of the town is its heritage atmosphere.

Castlemaine is surrounded by an extensive Box-Ironbark forest. Gold was discovered in the surrounding area in 1851 and was primarily found in alluvial deposits. The forest was protected by Government for two reasons. First, it did not wish to sell gold-bearing land. Second, the forest was a major source of timber. Nearly all the trees in the forest have been cut and then have sprouted multiple trunks from the stump (coppice regrowth). Mining took place in the forest and there are extensive remains including ruins, races, mullock heaps etc. This provides a challenge for visitor interpretation as it may appear as an unending series of holes and piles of rocks. Adding to this complexity are a number of Aboriginal sites and Chinese villages. In 2002, approximately 65,000 hectares of this forest was declared a National Park. In a first for Australia it was designated a Heritage National Park. As such, while the environmental values of the forest were recognised, the primary reason for its protection was its heritage values.

Relevant Success Factors

Quality and authenticity of products and experiences

Part of the extensive Mt Alexander diggings, the National Park offers visitors an authentic and intact alluvial gold landscape. The region's regenerating box-iron bark forest contains abundant relics of the period including kilns, huts, battery sites and sluices. While scope remains for more developed interpretation, contemporary physical intrusions in the site are limited, enhancing the sense of discovery for visitors and complementing the more manufactured experience provided at Sovereign Hill historic park.

Buda Historic Homestead

Buda is a historic homestead located on a 1.8 hectare property in the town of Castlemaine. It was built in 1861 and was occupied by the Leviny family from 1863 for 118 years. The homestead is notable for its collection of art created by the Levyns, nineteenth century garden, and the layers of family heritage items on display spanning the nineteenth and twentieth centuries evident throughout the building. The display has been designed to convey a 'living house' and garden through which visitors may explore. Buda Historic Homestead also includes a venue for conferences and workshops and a garden nursery selling heritage plant varieties, (<http://www.budacastlemaine.org/>).

Relevant Success Factors

Financial planning for budgeting, capital raising and price setting

At Buda, a finance sub committee with expertise in budgeting, cash flow and fund raising ensures that financial targets are carefully set and attainable. The property is not for profit and receives no outside funding assistance, although management has currently secured a grant with Heritage Victoria. Management have identified key areas of expertise for expenditure, such as developing the garden component of the property and employing a marketing professional, rather than spreading limited funding too thinly. Buda's fund raising frequently targets a single major theme rather than several small promotions which can exhaust resources and have limited returns. In keeping with the strong heritage garden theme associated with the property, for example, Buda has become an arm of the Castlemaine garden festival.

Effective marketing strategies based on sound market research

With local tourism agencies, Buda undertakes effective cooperative marketing ventures such as ‘Central Victorian Treasures’ and has joined with the Castlemaine Garden Festival to enable joint promotion. Repeat visitation is addressed through theming of presentations every three months. The ‘Seaside summers’ promotion, for example, comprised photos, art works and clothing related to the Leviny family and the sea. The approach enables free editorial and builds depth of product to use the collection in creative ways and offer new stories to the public. The strategy has been particularly significant with the visiting friends and relations market.

Human resource management, including paid staff and volunteers

Buda has four paid part-time members of staff and 60 volunteers. Buda’s limited funds for human resource development are targeted at management in the nursery/garden, and the marketing and publicity sections of the property. Buda also relies on volunteer expertise provided by professional ‘tree-changers’ with backgrounds in planning, management and horticulture.

Planning for product differentiation, life cycles and value adding

Buda’s management focuses on the quality and authenticity of the house and garden in its careful consideration of product development. Periodically refreshing the Buda experience through seasonal themes such as the ‘Autumn Festival’ aims at repeat visitation and extending the product life cycle. In addition, Buda’s Garden Festival is a successful example of value adding through building upon the existing heritage garden theme, which is promoted separately to the house, and has recently been enhanced through the heritage plant nursery.

Generally, Buda and the associated life of the Leviny family is promoted as atypical of country towns and as representative of the gold-generated prosperity of Castlemaine in particular. This has enhanced product differentiation as the house is linked more strongly to the unique themes of the goldfields region.

Quality and authenticity of products and experiences

Buda’s ‘themed’ presentations are now integral to the quality and authenticity of the heritage experience provided. How to interpret Buda without cluttering the ‘feel’ of the house and formalising its presentation is also a key concern in its presentation. Avoiding a sense of physical cluttering for visitors through excessive signage, for example, enhances the uniquely unstructured experience of history provided by the house.

Old Castlemaine Gaol

Constructed between 1857 and 1861, HM Prison Castlemaine is a significant intact example of a colonial ‘Model Prison’ such as was first constructed in Pentonville, London, in 1842. Throughout urban and regional Victoria, a total of eight prisons based on the Panoptican Pentonville design were built during the period 1857 to 1864. Despite decades of adaptation to a variety of uses including that of a restaurant and backpackers’ hostel, the prison remains historically significant as a representation of the status of Castlemaine as a civic centre since the discovery of gold in the district in 1851. Planning is currently underway for the remodelling of the prison as a hospitality training facility and local market.

Relevant Success Factors

As the Castlemaine Gaol is currently being redeveloped, the following success factors are included as indicators of particular areas being considered rather than existing factors that have led to success of the site.

Agreed objectives and clear concepts

The new operators will have to be very clear as to what they are operating. Will it be a hospitality training operation, retail area or heritage attraction? Ideally they would like to combine all three, but they need to be mindful that there may be conflicts. They need to be especially conscious that individual stakeholders may be more focused on one of these objectives to the detriment of others.

Financial planning for budgeting, capital raising and price setting

There will be a major change from admission fees to free entry. This will require careful management of other revenue sources such as retail sales and rentals.

Effective marketing strategies based on sound market research

There may be difficulties in increasing competition from similar gaol attractions. A Pentridge Museum will open soon with a strong (though inauthentic) emphasis on Ned Kelly. Beechworth’s recently decommissioned gaol is likely to reopen as a tourist attraction.

Monitoring of proximity to major markets and visitor flows

The Gaol is immovable and located separately from the centre of town. There will need to be a strategy to draw visitors towards it.

Design interpretation as an integral part of the heritage tourism experience

As a heritage attraction, the gaol needs effective interpretation. This may be overlooked in the redevelopment. There may also be a temptation to imitate the 'edutainment' approach being proposed at the soon to be opened Pentridge Gaol Museum.

Victorian Goldfields Railway

Victorian Goldfields railway is a remnant of the network of branch lines that serviced central Victoria from the 1880s until the 1970s. The network of branch lines provided essential transport and supply links to towns isolated by distance from Melbourne. An eight kilometre branch line between Castlemaine and Muckleford is used to run heritage train journeys. The rolling stock consists of a range of carriages and locomotives from the 'branch line era'. The railway is operated and maintained mainly by volunteers with a small number of part and full time staff. Most of the volunteers and funding is via the Castlemaine and Maldon Railway Preservation Society.

Relevant Success Factors

Financial planning for budgeting, capital raising and price setting

Railway management regularly seek grant funding to aid in the expensive infrastructure and insurance costs associated with the product. The Goldfields Heritage Railway dining carriage funds for restoration—which has proved a successful diversification of the core product—were secured through a private benefactor.

Effective marketing strategies based on sound market research

Marketing strategies are based on ongoing market assessment and include advertising in Regional TV and print media, direct marketing to target markets such as seniors and kindergartens, promotion to local retail and commission paid to accommodation providers for on-selling. Packages marketed cooperatively with VLine focussed on the Bendigo visiting friends and relations market has proved successful.

Value adding

Careful targeting of niche markets and development of unique products have added value to the Railway's core business. Themed 'Thomas the Tank Engine' trains, special event trains for dinners, birthdays and adult parties, as well as corporate gifts such as 'driver education' charged at \$1000 per experience have proved highly successful.

Sovereign Hill

Sovereign Hill is a replica 1850s gold mining town located in the City of Ballarat. It commenced operation in 1970 and presents an interactive experience of the 1850s Victorian gold rush era. The museum includes a full scale 1850s replica town, gold mining and an evening light show 'Blood on the Southern Cross' over an area of 30 hectares. Costumed actors populate the town site through which visitors may explore and purchase items from the various shops and restaurants or watch demonstrations of various 1850s trades by trained craftsmen. The site offers a combination of self guided and guided experiences as well as scheduled and 'impromptu' performances by various characters in the town. Although the site does include some original mine diggings, it does not have built heritage actually constructed in the nineteenth century. As a consequence, Sovereign Hill does not face the dilemma of conservation of artefacts versus tourist access to the same degree as management of an original nineteenth century structure might. The production 'Blood on the Southern Cross' is currently the centrepiece of the museum. The nightly open air show tells the story of a miners' revolt against the authorities using a fully automated system of light, sound and pyrotechnic effects with audiences walking and being transported across the Sovereign Hill site to view the experience. Sovereign Hill receives about 500,000 visitors annually including 450,000 day visitors and 56,000 night visitors (<http://www.sovereignhill.com.au/>, accessed 26/5/2006).

Relevant Success Factors

Agreed objectives and clear concepts

Sovereign Hill benefits as an operation from its strongly cohesive Board with its internally consistent core values and clear objectives for the operation. While the Board retains many of its original members, there is strong support for development and change at Sovereign Hill to ensure its ongoing success.

Effective marketing strategies based on sound market research

Sovereign Hill closely monitors its visitor profile, outsourcing its marketing research. The operation has identified a generational pattern of visitation. That is, parents will bring their children to experience the site, these children in turn will remember their experience and subsequently bring their own children in turn. Sovereign Hill consequently noted a plateau in their visitor numbers over the last 30 years. Plans to grow visitor numbers through direct international marketing are being developed. China has been identified as a significant market primarily through the Chinese tourists' interest in gold rather than Australian heritage. External factors such as the SARS outbreak are recognised as serious threats to this international market.

Human resource management, including paid staff and volunteers

Sovereign Hill has employed a dedicated human resource manager and recognises that staff are the key to its success. The operation prefers to employ people rather use volunteers owing to the greater commitment of time and training possible. Sovereign Hill has engaged professional consultants to train staff in relation to guided tours and experiences at the site. Sovereign Hill is a major employer in Ballarat but has difficulty in sourcing adequately trained staff from the local regional area. The manager considers that local networks are a more effective way of obtaining staff than job advertisements.

Planning for product differentiation, life cycles and value adding

Sovereign Hill has undergone several phases of redevelopment over its lifetime in order to remain relevant and provide fresh experiences. During the 1980s an accommodation lodge was built on the site to encourage overnight stays. Guests at the lodge have the entry fee included in their accommodation costs. An interactive, multi-sensory sound and light show that tells the story of the miners uprising in the region during the 1800s was developed in the 1990s. The show was reworked in 2002 to incorporate more advanced technology and improve the look of the experience. Plans for future redevelopment are in process to ensure displays and experiences are updated and kept fresh.

Focus on quality and authenticity of products and experiences

Sovereign Hill is a re-creation of a full nineteenth century gold mining town experience so is not authentic in the strict heritage sense of the concept. However, the operation recognises that it can provide visitors with experiences that closely resemble what such a mining town may have been like. Character actors, costumes and the general layout and structure of the town are designed to immerse visitors in an atmosphere of nineteenth century goldfields lifestyle. In effect it provides a sense of authenticity through basing the stories, experiences and physical design on sound research. Sovereign Hill is considered by some as having authority in knowledge of the gold rush era in Victoria. For example, schools frequently take students on field trips to the site in order to educate students about life on the Victorian gold fields.

Design interpretation as an integral part of the heritage tourism experience

Sovereign Hill approaches its interpretation through a concept of learning from interactive experiences and enjoyment. While information presented is based on sound research, content may often be delivered with humour or in other engaging ways by character actors. The site also adopts the use of 'strangeness reduction' through multi-language signs and interpretation forms that link the past with present understanding. Use of multi-sensory and high tech communication methods adds appeal to the experience and increases impact on visitors. The sound and light show is currently the centre piece of the Sovereign Hill experience. The high tech interactive experience appears to appeal to a broad audience, rather than the traditionally older heritage enthusiast.

Tasmanian Cultural Heritage Locations

Port Arthur Historic Site

The Port Arthur Historic Site is located on the Tasman Peninsula about 100kilometres from Hobart. The site is Australia's premier historic site and consists of more than 30 nineteenth century buildings and ruins dating from the convict prison period, spread over a 40 hectare area. Many of the original buildings that comprised the penal settlement and subsequent township were destroyed or damaged during fires in 1895 and 1897. The site began to draw the interest of tourists from the late nineteenth and early twentieth centuries seeking to experience the 'horrors' of a convict settlement (see Young 1996). A major conservation and restoration program between 1979 and 1986 was conducted prior to the establishment of the Port Arthur Historic Site Management Authority (PASHMA) in 1987 to manage the site. The site underwent a major redevelopment in the late 1990s including the construction of a significant purpose built visitor centre which incorporates a range of facilities and services including restaurants, ticketing, information, interpretation, gift shop, hire services, toilets, first aid and storage.

There are additional restaurants and accommodation on site. Today the site receives about 200,000 visitors annually (see <http://www.portarthur.org.au/>), and provides for both guided and self guided day tours of the ruins; a night time 'ghost tour'; and a harbour cruise including a visit to the 'Isle of the Dead', a cemetery island located just off shore in the bay. In many ways the operation of the PAHSMA is exemplary in terms of meeting the CSFs identified in the report because of the scale of the operation, the high level of public support for its conservation and its popularity with tourists. However, many of these factors are out of the reach of small business operators who have no capacity for the infrastructure and planning that is present at Port Arthur.

Relevant Success Factors

Agreed objectives and clear concepts

There are a wide range of stakeholder interests in the site extending as far as all Tasmanians and the broader Australian public. Port Arthur is closely managed by a Management Authority and Board. These organisations are guided by formal processes including a number of related plans which outline clear goals and aims for the site. These are overseen by a high profile Board with a balance of expertise in heritage conservation, and political, business and financial skills. The plans and objectives are implemented by trained and qualified staff of the PAHSMA. The management and promotion of the site is carefully balanced to recognise both significant heritage values and develop unique visitor experiences. A Tourism Strategy was recently developed with the aim of balancing these dual goals and will inform the Conservation Plan.

Financial planning for budgeting, capital raising and price setting

The management and operation of the Port Arthur Historic Site is assisted through generous state grants. This allows a great deal of flexibility and autonomy in how the site is managed and operated. Tourism at the site generates greater revenue than the grants. However, the responsibilities of government and conservation are costly, and include running of the Board and employment of staff. The site thus returns a negligible profit which would be a debt without the grants. Port Arthur, in turn, makes a considerable return to the overall Tasmanian economy.

Financial management is critical to the overall operation. Expenditure is monitored and budgets set and managed, including visitor number forecasts and other financial management strategies. Additional financial initiatives include a number of optional tours at the site which are additional to entry fees. The entry fees are also managed to ensure that locals continue to have access to the site, for instance there is free entry for Port Arthur locals and a discounted annual pass for other Tasmanians. The site is a highly desirable events location that offers opportunities for fund raising. However, this has to be balanced with providing year-round access for all visitors and maintaining appropriate ambience on the site.

Effective marketing strategies based on sound market research

The Port Arthur Historic Site has traditionally relied on its iconic status and its central role in Tasmanian tourism promotion. Its marketing was formerly managed by a regional marketing group of which Port Arthur was a significant financial member. Recent changes to that group, and a trend away from a heritage focus in the Tasmanian destination image has required a recent re-evaluation. The marketing needs of the site are now recognised as having greater importance and a decision was made to appoint a marketing manager at PAHSMA. This role will address the separate but related issues of marketing and market research, providing a clear focus on the needs of the Port Arthur Historic Site and extending market research beyond monitoring of visitor satisfaction and visitor origin.

Monitoring of proximity to major markets and visitor flows

Tasmania has traditionally enjoyed a strong convict heritage destination image which draws on the popularity of the Port Arthur site. Port Arthur is a major draw card for heritage tourism and integral to the destination image of the whole state. Many visitors travel to the Port Arthur site as a day trip from Hobart. This is not necessarily problematic for the Port Arthur site itself, but they recognise their role in relation to tourism on the Tasman Peninsula more broadly. To encourage longer visits and better use of the region, the Port Arthur Historic Site has introduced a range of additional tours and products. This includes the popular ghost tours conducted at night which encourage overnight stays. The issue is being further addressed in the redevelopment of the on-site motel which will introduce five star accommodation on site.

Human resource management, including paid staff and volunteers

The high level of funding available to the Port Arthur Historic Site and the strong conservation focus of the organisation requires employment of highly skilled heritage and tourism staff. Port Arthur does not rely on volunteers. Employed staff, including locals, are more likely to have a high level of expertise and commitment. The relative remoteness of the site can make it difficult to attract staff to the site especially as most employment tends to be part time work and only during peak tourist seasons. Peak season also coincides with staff accommodation shortages which Port Arthur is trying to address. For some employees, the isolated location is balanced by the prestige of the site as a heritage attraction. This is especially attractive to heritage focused

employees who see experience at the site as relevant. Positions at PAHSMA are also attractive because of the state public service conditions, wages, leave and career opportunities. The agency also provides training on the job; PAHSMA has participated in employment and training programs, and in return has been able to retain participants in a longer term capacity as staff.

Planning for product differentiation, life cycles and value adding

Port Arthur is iconic and in a distinct category so has little difficulty with market differentiation. PAHSMA does, however, place considerable emphasis on evaluation and updates to ensure that it keeps pace with market demand. A number of add-on tours to the main site have been developed including the night time ghost tour, cruise to Isle of the Dead, and additional services and facilities within the new visitor centre including appropriately priced and relevant souvenirs in the gift shop. Re-evaluation has identified instances where once popular tours became less so with the development of similar products elsewhere. For example, the ghost tours were once unusual and very popular but as similar tours are offered at a range of other locations in Tasmania, there has been a decline in interest at Port Arthur. New products have been developed in response to this. Recent examples include the audio- tours, performances and Tasmanian Symphony Orchestra concerts.

Focus on quality and authenticity of products and experiences

Authenticity is the core element of what Port Arthur Historic Site prides itself on. It is the primary concept around which tourism is developed. Being 'the real thing' is a central aspect of how the site is managed and interpreted. While sites like Sovereign Hill are effective, the Port Arthur Site feels no need to dress up or re-enact the past because what they have is 'the real thing'. The PAHSMA also feel that they have a responsibility to the whole nation to look after the site and that is their primary function, and authenticity is critical to that. The site has strong connections with real stories and people associated with the property. They would like to extend this to all aspects of the operation including the products sold.

Engage cultural heritage and tourism expertise in conservation and promotion

The PAHSMA recognises the importance of having expertise in both conservation and promotion. The site is attractive to heritage managers and so it can usually attract a high level of expertise in its conservation staff, and the Board is also balanced in terms of these two sets of skills. In addition the Authority has taken active steps to ensure that its staff are qualified and trained appropriately. The site recently introduced an advanced diploma in business management for managers in the tourism operations section,

Design interpretation as an integral part of the heritage tourism experience

The PAHSMA recognises interpretation as integral to the conservation and presentation of the site. It employs two full time interpretation staff and a number of guides. There is also a recently appointed trainer for the guides. All aspects of interpretation are guided by an interpretation plan, which is a sub-component of the Conservation Plan and consistent with the goals of the organisation. Interpretation at the site takes many forms including an extensive interpretation in the visitor centre, on-site museums, panels and pamphlets. There are also guided tours of the site and a harbour cruise as part of the admission fee, and optional interpretation offered through ghost tours, Isle of the Dead tours and audio tours. The site takes advantage of its local community and employs many locals as guides who provide a real connection between the site, the people and the stories.

Cascades Colonial Accommodation

Cascades Colonial Accommodation is situated at Koonya on Norfolk Bay on the Tasman Peninsula in south-eastern Tasmania. It is situated about 95 kilometres from Hobart and about 25 kilometres from Port Arthur. It is well positioned in relation to a number of tourist attractions including the Port Arthur Historic Site, the Saltwater River Coal Mines and the Tasman National Park. The property was originally a probation station linked to the Port Arthur Settlement. It was first commissioned in 1842 and provided timber for the Port Arthur settlement. The station operated until 1857 and about 400 convicts were housed at the site at the peak of its operation.

It is a significant heritage site because it is relatively complete compared with other probation stations in Tasmania. There are several convict-built buildings on site including a mess, hospital, two blocks for officers' quarters, solitary cells, workshop and other relatively undisturbed buildings. Many artefacts and ephemeral remains of a steam sawmill, sawpits, water sluice, and tramway give the site particularly high archaeological significance.

Many of the buildings suffered significant deterioration and fell into disrepair as a result of their abandonment and subsequent use as agricultural storage and housing. In recent years the Clark Family, who have owned by the property since 1915, have made significant efforts to minimise further deterioration. The uniqueness of the site and its potential for research make stabilisation rather than restoration the preferred conservation measure. However, the restoration of several cottages has allowed the site to be developed as

heritage accommodation. Visitors are provided with an exclusive access to the site, including the private museum and a number of walks to the site of the convict wharf, sawmill and stone quarry. The site is also used as a wedding and function venue.

Relevant Success Factors

Agreed objectives and clear concepts

Cascades has no formal process for setting objectives and concepts but has an understanding of the business passed down through practice and respect. Originally the accommodation developed as a means to restore and conserve the buildings which were in a state of disrepair. The business was passed to the next generation as the parents aged. The roles and responsibilities of different generations of the family have evolved to take account of these changes and needs. The driving motivation is lifestyle more than profit and this is reflected in the way in which other critical success factors are addressed at the Cascades site.

Financial planning for budgeting, capital raising and price setting

Cascades Colonial Accommodation has taken advantage of several circumstances that assisted its financial security. The property was part of the family farm and did not need to be purchased. The farmers' practical skills were used to undertake most of the physical labour for the conservation works. They have utilised various heritage grants to fund these costly works. The use of heritage grants requires good time management to match personal and external deadlines. Financial commitments have been kept deliberately low, building the business slowly rather than extending loans and debts to fund the work. This minimal risk strategy is part of the lifestyle choice of living on the property at Kooyong with minimal stresses.

Effective marketing strategies based on sound market research

As a small owner-operated business, Cascades Colonial Accommodation uses a number of accessible and low-cost market research techniques including an important but easily overlooked strategy of talking to their guests. They keep note of basic details such as where visitors come from and their responses to the property. They use the Internet as a relatively cheap and globally accessible form of marketing and experiment with different web links as well as their own web site. They have an increasing interest in the wedding market which is more stable than the general tourism market, and they are competitive as a relatively low-cost, 'do-it-yourself' venue. While they have identified new markets, they will not pursue these until they can fully accommodate and meet that demand. For instance, they will offer more services and promote additional functions once their two small children are older. Email and web enquiries have become more popular over the last ten years and this also provides the flexibility to balance family and business.

Monitoring of proximity to major markets and visitor flows

The proximity of the Cascades Colonial Accommodation to Port Arthur is a critical factor in its success. Unfortunately, the accommodation and reception are located on opposite sides of the road, and the reception area is not in keeping with the site. This can mislead tourists passing by as to the type of accommodation. The managers are exploring ways to promote the site from the road. The site attracts a diversity of visitors including overflow of tourists when other accommodation is full, and niche market visitors seeking a quality heritage experience beyond a place to sleep. The operators have identified new developments that may have a positive impact on the business. For example, the new Port Arthur hotel is perceived as an asset rather than competition, adding to the popularity of the region as a whole and creating a critical mass of accommodation. Cascades monitor their competition through accommodation booking sites.

Human resource management, including paid staff and volunteers

The family run and manage the business, and employ two cleaners to assist with maintenance. One cleaner has been working for them for a very long time and new cleaners have generally been relatives of that cleaner. This suggests a succession of employment for both the owner operators and their employees. The family's strongly positive relationship with the region is a significant factor in support from the local community. As a result, Cascades has never experienced any difficulty attracting or retaining staff.

Planning for product differentiation, life cycles and value adding

The development of the site has been creative in adaptive reuse of the buildings which are restored for contemporary comfort but which retain a rustic feel. The operators have incorporated unique aspects such as a private museum which visitors can access with their own key during their stay, and highlight the uniqueness of staying at a convict probation station. Bushwalks around the site are an additional asset and in the past Cascades has offered bush barbeques as an option to guests.

Focus on quality and authenticity of products and experiences

Quality and authenticity are a key to the success of the Cascades Colonial Accommodation. The restoration of the buildings is in keeping with the heritage values of the site, and is of a high quality with considerable effort to

ensure contemporary styling and comforts. The authenticity of the location is maintained by separating the tourist accommodation from the functional areas such as the reception and farm house. The authenticity of the site is enhanced by the owner-operator family who are long-term residents of the property. The family have real stories and connections with the region. The older generation on the property is actively engaged in recording and researching the history of the site.

Engage cultural heritage and tourism expertise in conservation and promotion

The Cascades Colonial Accommodation operators have developed a combination of skills in conservation works and business management through restoration works and the operation of the business. Their proximity to Port Arthur also gives them access to a range of skilled heritage workers and they were able to engage a skilled heritage architect to assist with restoration. They also draw on other skilled labour for furniture construction and other elements of the property, and these individuals in turn are offered free training and skills by the PAH SMA.

Design interpretation as an integral part of the heritage tourism experience

Cascades Colonial Accommodation incorporates formal and informal interpretation of the site through the private museum, direct interaction with the Clark family, historical research and the sale of a small booklet on the history of the site.

Woolmers Estate Home and Accommodation

Woolmers Estate is situated about four kilometres south-east of Longford in northern Tasmania. The property is historically and architecturally important in Tasmania, and is particularly significant for its continuous association with the Thomas Archer family. The Estate was originally granted to Thomas Archer in 1817 and remained in the family until 1994 at the death of the last heir. The stability of ownership has produced an encapsulated record of six generations from the time the land was first settled. Both the Woolmers Homestead Complex and the Woolmers Gardens are listed in the Register of the National Estate. The homestead is a finely built and maintained single storey brick house in Colonial vernacular style. The main house is complemented by an impressive collection of outbuildings including pump house, barn, store, wool shed, stables and gardeners' cottage. The garden is historically significant as an early example of the Gardenesque style and includes a number of stylised architectural elements.

The array of extant buildings on Woolmers including family houses, workers' cottages, former chapel, blacksmith's shop, stables, bakehouse, pump house and gardener's cottage provides an insight into the social structure of a colonial pastoral estate. The combination of the historical collections and buildings represents a significant cultural resource and an important visitor attraction. The site is also home to the National Rose Garden of Australia which provides an additional attraction for tourists. The site is open to visitors daily including guided tours of the main house and self-guided tours of the outbuildings and gardens. Morning and afternoon teas and light lunches are available from the Servants' Kitchen restaurant. Accommodation is also available on-site in seven colonial cottages. The revenue from the cottages makes an important contribution to the conservation maintenance of the site (The Australian Heritage Commission 2001; Woolmers Estate 2003).

Relevant Success Factors

Agreed objectives and clear concepts

The Woolmers Estate is managed by the Archer Historical Foundation, a public trust guided by a Board of Directors who provide strategic direction for the management and conservation of the Estate. As a formal body it has a number of clear goals and concepts outlined in its Conservation Plan, Tourism Strategy and a number of other documents. The goals of the trust are clearly defined and there is agreement that conservation and tourism are its core issues, and also the basis of the tourism product. The conservation goals inform the day-to-day management of the business by the Manager, staff and volunteers. Woolmers Estate management recognises the Board, staff and volunteers as key stakeholders who must have a strong sense of ownership of the business and the goals of the trust. This responsibility and accountability for the business leads to improved and shared management. Woolmers recognises its broader responsibility to the local community and encourages inclusion by using local suppliers and products.

Financial planning for budgeting, capital raising and price setting

The appointment of a manager with a strong tourism business and marketing background has seen a strong turn around in the financial operations at Woolmers. This appointment has affected a number of changes to the business including significant improvements in financial planning and management. The Estate has been transformed. It once incurred considerable losses necessitating the sale of assets, especially land, but is now a business turning a slight profit. Profit is not the primary aim, but allows the site to continue to operate and minimises the sale of significant assets. Conservation of the site is costly and fundraising is necessary. The Estate has three main income streams; the most profitable is the accommodation, followed by the restaurant and

entry fees. The manager has completely restructured the financial management, including a review of suppliers, appointing permanent part-time staff, and using volunteers for a greater variety of maintenance tasks. The Board has been encouraged to take greater ownership of the business and given responsibility for attracting sponsorship. Additional initiatives include strategic promotion events such as a one off Mercedes Benz Car Launch in the Homestead in return for a significant financial contribution. Repeat visitation is encouraged by providing free entry for locals who bring guests to the site. The financial and business restructure has had the greatest financial return for the site, and is continuously reviewed, including a plan to renegotiate Council taxes and rates. The cost of accommodation in one of the cottages is packaged with a tour of the homestead, access to the Rose Garden and breakfast which results in a good price for regional accommodation.

Effective marketing strategies based on sound market research

The Woolmers' manager has a high level of skill, experience and expertise in marketing and tourism and constantly updates these skills through training and education. This is a valuable asset for the organisation, providing a means to review and update the marketing Plan, conduct timely market analysis and develop appropriate marketing strategies. The site is promoted through Tourism Tasmania but the high commission erodes the profits from accommodation bookings. While Woolmers is seeking to diversify its markets and increase visitation, it also recognises that its core markets—interstate day visitors, and the seniors market—are essential to the continuing success of the business. There is a limited marketing budget but the manager has been strategic with quality promotion in key magazines appropriate to the market, for example, advertising in *Country Life* and obtaining exposure through the media stories in *Jetstar Magazine* and national and local newspapers. Woolmers has also joined together with other operators in the region to jointly market the region through a number of initiatives including a northeast regional map of key historic houses open to the public. High quality brochures designed to stand out are available at gateways to the State. The site is also gaining popularity as a venue for weddings and other events, and these trends are monitored. There are also plans to consider how to address age and gender bias by exploring new ways of bringing male tourists into historic houses and including women and children in interpretation. The introduction of new markets and products has to be matched by ability to deliver. For instance, the ageing population has implications for access to the site and an audit by disability services will help to determine what facilities are needed to provide greater access, and how to balance this with the conservation plan.

Monitoring of proximity to major markets and visitor flows

The Woolmers Estate is not as iconic as Port Arthur but within the northeast region it is the primary heritage attraction with about 23,000 visitors each year (compared with 6000 to 8000 visitors at nearby properties such as Entally House and Brickendon Estate). It has secured a partnership with the National Rose Garden which is co-located at the Estate and this brings in additional visitors. Woolmers is the key tourist attraction of the Longford region, and works closely with other operators to strengthen the regional profile. Longford is part of a growing tourism region, but suffers from its close proximity to Launceston which offers a greater number of restaurants and overnight facilities. The recent purchase of Entally House by Gunns Corporation is likely to have an aggressive marketing campaign and will be a key partnership for Woolmers.

Human resource management, including paid staff and volunteers

The Woolmers business restructure includes significant changes to human resource management. This included a rationalisation of existing positions, regardless of the cost to individual employees. This had consequences for the manager's relationships with people in the town and region. As part of the restructure, staff are employed as permanent part-time workers with individual responsibilities for expenditure and profit. This has reduced wages as the major expense for Woolmers, and gained greater ownership of the business by staff. The manager leads by example being prepared to undertake any menial task when necessary, and in return expects other staff to contribute wherever they can. More strategic use of volunteers has further reduced maintenance costs; for example the purchase of machinery allows volunteers to mow the lawns rather than paying for this service. The elderly head gardener and long-term guides retired leaving a need for recruitment and training of new staff in the quiet times. Volunteers cannot be paid, but a number of incentives and subsidies are provided to support these individuals including petrol assistance and lunches. 'Dinner for 2' type awards are offered as motivation to volunteers and staff. The National Rose Garden is an independent, though affiliated operation, that uses the Work for the Dole program to establish and maintain the garden. The program has been successful and has helped to shift the attitude of many towards people on the program, allowing the possibility of extending the program to the Woolmers Estate.

Planning for product differentiation, life cycles and value adding

Woolmers Estate is a unique property with a continuous association with a colonial family. The property has moved into a formal process of management, including regular reviews and updating of Plans since being bequeathed to a public trust. The extensive grounds and gardens, outbuildings and on-site 1840 cottage accommodation is complemented by tours of the main homestead. This is a point of difference from the

neighbouring Archer property where the homestead is a private residence. New initiatives and value adding includes the establishment of a kitchen garden with heritage vegetables and herbs consistent with the earliest period of occupation. The kitchen garden is now established and the next stages will be to use produce in the restaurant and propagate seeds and plants for sale. In partnership with Events Tasmania, the property is also packaged as a wedding venue—together with Clarendon House, offering different scales and settings for weddings in the two gardens. The gift/souvenir shop has a focus on locally made products.

Focus on quality and authenticity of products and experiences

The authenticity of Woolmers Estate is integral to its appeal and significance, and forms the basis of the tourism product. The Board has responsibility for ensuring this is maintained and the business has to be operated accordingly. It can be a challenge to balance this with tourist needs. For instance the accommodation is unique and of a high quality but does not meet contemporary hotel standards. While this can be disappointing for a few visitors, it is the authenticity of this experience that most people value and which attracts guests. The need to conserve and present the site as an 1820s estate limits how much the site can be modernised or modified, including the instalment of new facilities, access ramps, etc. The authenticity of the site is realised for visitors through the association of the Archer family over six generations, especially in hearing stories told by local guides, and the experience of being on the Estate.

Engage cultural heritage and tourism expertise in conservation and promotion

The Board is comprised of individuals with both heritage conservation and business management skills. This includes members of the business community and an expert heritage conservator. The manager would like to complement these skills by including members with expertise in interpretation. Efforts are made to ensure this balance of skills is maintained on the Board and among the staff. The manager has a business and tourism background, and is acquiring heritage knowledge through his position at Woolmers. His lack of heritage knowledge makes it necessary to buy in heritage expertise which can be costly. However, the costs of doing the work properly is more effective than shortcuts or bad work that has to be redone and/or which can cause or cause irreparable damage. Woolmers also seeks assistance from the public sector including museum and heritage agency staff wherever possible. The volunteers have a range of relevant skills that are used in different aspects of conservation and business operation as appropriate.

Design interpretation as an integral part of the heritage tourism experience

Interpretation is a vital part of the operation. It can be overlooked because it is not a large part of the business, but it is central to visitor experience. The guides are a core part of delivering the interpretation. Entry Fees include a self-guided tour booklet and there is additional signage to assist visitors develop an understanding of the property. The importance of interpretation is recognised by the recent Interpretation Plan which will be reviewed and implemented when the business is more fully secured.

Brickendon Farm and Historic Accommodation

The Brickendon Estate is a working farm about three kilometres south of Longford in northern Tasmania. The farm belongs to the prominent colonial Archer family who formerly owned a string of properties in the region including Woolmers (also included in the study). William Archer emigrated from England to join his brother Thomas at Woolmers in 1824 before he acquired the nearby ‘Wattle Park’ in 1829. William renamed the property Brickendon and it has been occupied ever since by his direct descendants. It is a remarkably intact rural heritage complex, including a main residence, outbuildings and chapel set in their original farming lands. The property reflects the lifestyle of early landed gentry in Tasmania and both the house and gardens are recognised as significant and included on the Register of the National Estate (Australian Heritage Commission, 2001; Brickendon, 2006). The Colonial Georgian home was built in 1829–30 and partially rebuilt following a fire in 1845. There are also stables, timber barns, outbuildings and workers’ cottages as well as a small brick chapel. The property is surrounded by hawthorn hedges and the formal garden that complements the Georgian homestead is significant in its own right.

The Archer family continues to operate the farm, and the family runs an associated heritage tourism business. The tourism business is primarily used to fund conservation of the significant heritage buildings and features on the property. Tourism activities include a range of self-guided and guided tours of the extensive buildings, grounds and gardens. A number of the historic cottages are available as visitor accommodation, and the property is a venue for weddings, conferences, meetings and product launches. It was also featured as a set for the film ‘My Brilliant Career’ to convey the lifestyle of the early landed gentry of eastern Australia.

Relevant Success Factors

Agreed objectives and clear concepts

The operation of the tourism business at the Brickendon Estate was established as a means to conserve the significant heritage buildings on the family property. The business is owned and operated by the Archer family who have continuously owned the property since 1829. The primary stakeholders are the immediate family, currently three generations, living on the property. The growing recognition of the significance of the property also gives the wider Australian public an interest in the site. Consequently the principle aim of conservation is consistent with this broader responsibility while meeting the desires of the family. The way the property has been managed has required renegotiation and agreement about different roles and responsibilities in the business. Clarifying these roles has helped to minimise conflicts and disagreements in the operation of the business.

Financial planning for budgeting, capital raising and price setting

Tourism was initiated to self-fund the conservation of heritage buildings at Brickendon Estate. These are highly valued and a source of pride for the family. The business is seen as complementary to the farm operation and the two support one another financially. The farm also offers logistical support and labour to maintain the tourism village. They have made use of tax concessions for the conservation works. The financial aim is to maximise yield from tourism without simply pursuing increased visitor numbers which could be detrimental to the fragile heritage features. Few Tasmanians visit the site, and a short term trial of free entry for locals accompanied by visitors aims to increase local visitors.

Effective marketing strategies based on sound market research

Brickendon relies on partnership marketing through organisations like Tourism Tasmania. Despite the high commission paid to the agencies, the quality of marketing and time saved by using the services makes it worthwhile for the small family business. However they do review participation from time to time, especially in context of increasing Internet bookings. Brickendon spreads its advertising and promotion across a range of media to maximise exposure. The operators monitor their markets by asking visitors.

Monitoring of proximity to major markets and visitor flows

The promotion of Tasmanian short breaks has seen a downturn in visitors in regional areas. However, Brickendon is located in a growing tourism region. The property has taken advantage of events such as V8 Supercars, AgFest and the Deloraine Craft Fair as well as other sporting events which bring many new visitors to the region. These events also increase demand for accommodation. Brickendon recognises the value of clustering in creating a critical mass of attractions that increases visitation in a region. In this context Brickendon and Woolmers could operate as complementary businesses. Brickendon is keen to ensure that this is the case rather than Woolmers being regarded as the principle attraction with Brickendon being a secondary option or alternative. The very close proximity to Woolmers can deter tourists visiting Brickendon. There is cooperation amongst similar businesses in the region in sharing accommodation bookings in times of high demand or when there have been cancellations.

Human resource management, including paid staff and volunteers

Brickendon is a family owned and run business. They do not use volunteers because this would require a level of supervision that would restrict the flexibility they enjoy in running their own business. There has been a need to clearly define roles and responsibilities in the tourism business to best use family members skills. They have recently employed a new full-time staff member for 10 months of the year. This arrangement suits the individual employee who has an interpretation background and pursues other interests during the two month winter break. As the children grow up they may also become involved in running the tourism business either as a short term or longer term proposition. Flexibility in the work arrangements are important for balancing family needs at this time.

Planning for product differentiation, life cycles and value adding

Feedback from visitors has helped Brickendon identify its key features and selling points. The heritage features of the site, especially as an example of the indenture system in Tasmania, is unusual and a point of difference. The tourism operation offers a range of activities and interpretation including self-guided tours of the village, farm tourism, accommodation and special events such as weddings. This helps to attract a diverse range of visitors. Weddings are particularly popular because of the original picturesque and intimate chapel on site.

Focus on quality and authenticity of products and experiences

The authenticity of the site is a source of great pride for the Archer family who are keen to maintain and conserve the site. This is the primary rationale for running a tourism business. They value visitors who appreciate the quality of the experience and the uniqueness of the property. The continuity of the family

association is a particular source of pride and tourist interest, although some visitors mistake family members for casual staff members.

Engage cultural heritage and tourism expertise in conservation and promotion

The continuity of family farming practices has in some instances maintained and conserved the heritage landscape. For instance, the hedgerows at Brickendon are well maintained and intact unlike many other farms in Tasmania where they have been removed. The richness of heritage features means that almost every alteration or development has some impact and these must be monitored and managed. The family has developed conservation skills through involvement with Woolmers and working with heritage practitioners.

Design interpretation as an integral part of the heritage tourism experience

Brickendon recognises the importance of interpretation for the Estate. It includes interpretation panels and a self-guided tour pamphlet and map for visitors. A recent STCRC project made a number of cost-effective and manageable recommendations to improve interpretation of the site and enhance the tourist experience of the property (Stell and Pocock 2006).

Western Australian Cultural Heritage Locations

Benedictine Community of New Norcia

New Norcia is a small town with a population of 70 residents and is located about 130 kilometres north of Perth, the capital of Western Australia. It is situated inland, in a primarily agricultural region. New Norcia is unique in that it is the only privately owned monastic town in the Southern Hemisphere. The town was established by Benedictine Monks in 1846 as a Catholic mission. While only about 160 years old, the Town of New Norcia functions from a 1500-year-old tradition of Benedictine heritage and hospitality. It was at its peak during the 1920s as a centre for religion and education (with a boys and girls boarding school) in an isolated farming district. It has extensive impressive architecture in the Spanish Mediterranean style and a small and still active, though ageing, population of Benedictine Monks. New Norcia has 27 buildings classified by the National Trust and the town as a whole is registered on the national estate. It offers individual and group accommodation in the old boarding schools and monastery and is a venue for workshops and retreats. It is home to a significant collection of priceless European art and is also a significant repository for Indigenous, European and Western Australian religious material (<http://www.westernaustralia.com>, accessed 31/3/2005). New Norcia receives about 60,000 visitors annually, the vast majority of which are self drive Perth metropolitan residents.

Relevant Success Factors

The combination of adherence to the authentic Benedictine way of life and development of good business sense has contributed to the development of New Norcia as a successful and recognisable tourism product. The town is located on a major touring route north from Perth and has a surprising offering of classic Spanish architecture in an otherwise agricultural farming landscape. Brand recognition through development of distinctive bakery products, olives and establishment of a café (New Norcia Café) in the Perth metropolitan area are notable aspects of success.

Agreed objectives and clear concepts

The development of New Norcia as a tourism destination has come from a foundation of 'strong core values' based on the monastic Benedictine religious/spiritual lifestyle. These values provide the framework for setting tourism development objectives. Integrity and authenticity form the basis of decision making driven by the monks, providing a consistent and clear purpose for the town. New Norcia has strong connection with the local community as the region's biggest employer, and in terms of local community involvement in town planning, operation and development. The town works to balance the local community social imperative and maintenance of the monastic lifestyle with the business imperative.

Financial planning for budgeting, capital raising and price setting

New Norcia recently employed a town manager and accountant to better organise financial dealings and management. The town now runs on sound business principles with financial planning and budgeting that enables effective allocation of funds for ongoing management and maintenance. Restoration works are funded through government grants for which the town puts in regular applications. The usually long grant lead time for funding is incorporated into financial planning. The monks also wine and dine potential donors and benefactors to encourage donation of funds for sealing of car parks and other works.

Effective marketing strategies based on sound market research

Town manager conducts market research regarding the type, origin and number of visitors to New Norcia. New Norcia participates in cooperative marketing with other businesses in the region such as local wineries, the observatory and arts and craft studios; and uses high quality brochures at gateways. The Internet provides a relatively cheap and globally accessible form of marketing. Past lessons in over promising, resulting in unsatisfied visitors, have been learnt. The town now operates from an 'under promise, over deliver' philosophy.

Human resource management, including paid staff and volunteers

New Norcia's town manager has a legal background in human resource management. Volunteers are an important resource for inexpensive labour and fund raising for the town. Employees are drawn from the local community or are encouraged to move into the local community rather than commuting from elsewhere.

Planning for product differentiation, life cycles and value adding

New Norcia has a strong religious image—monastery and monks forms the central component of the product. This is associated with a strong sense of integrity and authenticity that appeals to visitors. A town master plan provides an overarching framework for future development as funds become available. Use of the heritage 'brand' has been successful in promoting the New Norcia breads and olives. There are plans to produce an Abbey Ale to tap into a new market segment using the heritage theme. Any new development comes from the foundation of maintaining authenticity and integrity, a trustworthy brand.

Focus on quality and authenticity of products and experiences

Authenticity is the primary concept around which tourism is developed New Norcia, as the town considers maintenance of the Benedictine way of life as central to its purpose and success. The religious/spiritual aspect enhances tourist perception of authenticity and integrity and the town recognises that any diversion from this could 'cheapen' the experience. 'Crass commercialism' is avoided. For example, the accommodation is not of international standard hotel style, but offers another kind of experience in terms of the rural monastic lifestyle.

Design interpretation as an integral part of the heritage tourism experience

New Norcia has an Interpretation Master Plan that includes landscaping, displays, signs etc. for the entire town that will be implemented as funds allow. Interpretation is based on real stories/people/connections with the property. The interpretation planning, design and installation was outsourced to private contractors/consultants to access expertise and ensure quality.

Whale World

Whale World is a whale and whaling museum located on the site of a whaling station that operated from 1952 until 1978. It is located near the City of Albany, 400 kilometres south of Perth. The whaling station was originally built from second-hand materials and machinery with a knowledge that the operation was always going to be temporary. The original buildings and machinery that comprised the whaling station have been restored and form the bulk of the museum display. Key aspects of the station such as machinery, flensing deck, cutting deck, generators and digestors have been preserved and allow visitors to gain insight in to how whales were processed. Other buildings have had their interiors modified while the exteriors were restored to their original state. For example, the oil storage tanks have been converted into movie theatres, a look out and photographic exhibition. Some of the other sheds have been similarly modified to house photographic displays or whale skeletons while maintaining the original exterior façade. A 530 tonne whalechaser boat (Cheynes IV) has also been restored, placed in dry dock and is fully accessible to visitors. Entry to the museum is through a purpose built visitor centre housing a café, theatre and souvenir shop. There are still strong links between the whaling station and the local community, particularly owing to the sudden closure of the operation (with little or no notice) and the subsequent loss of jobs and lifestyle. Whale World attempts to present both the whaling heritage as a socially and economically important part of Albany's history but also has displays communicating the importance of whale conservation. Whale World receives about 75,000 visitors annually (see <http://www.whaleworld.org/>).

Relevant Success Factors

The successful attributes of Whale World are a combination of fortuitous circumstance and careful management. The whaling station was run as a tourist attraction after its operations ceased where tourists were essentially charge a small fee to have a look around the facility. In 1980, the owners gave the whaling station to the Jaycees Community Foundation, a non-profit community focused organisation, as a result of a chance meeting at a function on the Gold Coast. The general manager is a registered builder and the co-manager and Jaycees' representative has post graduate qualifications in marketing. The whaling station is unique in terms of its accessibility to the public and restored state of preservation.

Agreed objectives and clear concepts

The Jaycees Foundation developed a vision statement and strategies for achieving the vision that provide a clearly defined focus of operation. Whale World also has a comprehensive business plan, conservation strategy and strategic commercialisation plans in place that provide a clear framework for operation and development.

Financial planning for budgeting, capital raising and price setting

Operation of Whale World is from a 'business driven approach' with a focus on yield rather than visitor numbers. For example, Whale World relies heavily on entry fees as a source of revenue for daily operation. Entry fees were raised based on knowledge of what the market would accept. The increased fee was accompanied by a marketing campaign focussing on value for money. Visitor numbers declined slightly but fee profits increased. The operation also has good financial management systems that promote careful budgeting and management of cash flow. Whale World primarily uses government grants for restoration and capital works for improvement and conservation of the site. Documented detailed development plans and strategies were key to successful grant applications.

Effective marketing strategies based on sound market research

Access to staff with marketing expertise provides a significant advantage. Whale World has a full time marketing manager who runs an 'aggressive marketing campaign'. Marketing campaigns and business plans are based on detailed market analysis and knowledge of visitors to Whale World and the Albany region. Use of high quality brochures available at gateways together with a good quality web site provide effective marketing channels. Whale World carefully monitors market trends and develops strategies to counter any expected downturns. Whale World has the rural arm of the Television Channel 9 (WIN) as a major sponsor that can provide rural regional promotion of the facility.

Monitoring of proximity to major markets and visitor flows

Whale World is close to popular natural attractions and caravan park though some distance from Albany. Visitor flows to the region are carefully monitored in terms of visitor origin, types and numbers. This information is inputted into marketing strategies and business plans.

Human resource management, including paid staff and volunteers

Whale World has mainly paid staff to manage and run the operation. Each component of the operation has a paid manager including a marketing manager, retail manager, finance and administration manager and a maintenance manager. Operational staff (ticket sales, retail sales, guiding) are employed on a full or part-time basis. A few volunteers are present on the boat display (whale chaser), mainly to prevent theft and vandalism but also to answer questions. Paid staff members are considered vital to ensuring primary commitment to the operation without risk of other demands taking time away from work at Whale World.

Planning for product differentiation, life cycles and value adding

Plans for ongoing value adding and revitalisation of existing buildings, machinery are intended to improve and revitalise the Whale World product over coming years. Future developments and scope for expansion include plans for a larger restaurant, accommodation, an aircraft museum, a wildflower walk, a shark display, a dedicated visitor centre and convention facilities. A small jetty has been constructed to enable ferry cruises from the City of Albany across the bay to Whale World, in addition to self drive or shuttle bus options. The capacity to reinvent/innovate provides an added dimension to the experience such as 3D movies in old oil storage tanks, conversion of interiors of buildings for housing of artefact displays and the redesign of the entry point and shop. The planned ferry service from Albany City will be complemented by expanding the café/restaurant to cater for larger crowds and increased length of stay. A gift/souvenir shop with local and appropriate products—both in price and relevance will also be developed.

Focus on quality and authenticity of products and experiences

All modifications to original buildings on the site for tourism purposes are reversible. For example, the interior of buildings have been modified for exhibits, including mezzanine floors, which are all removable. All building exteriors are maintained in their original authentic state. The displays focus on real stories/people/connections with the property. Whale World engages a part time archivist to this end. Restoration work is conducted by contracted and employed skilled tradespersons.

Engage cultural heritage and tourism expertise in conservation and promotion

Whale World employs skilled tradespersons to maintain and restore buildings on site. A part time archivist is employed to ensure accuracy of exhibits. Whale World is also linked to formal and informal networks that share information and resources and build working relationships with other organisations—primarily through the Jaycees Foundation. As a result, Whale World has access to a pool of skills from the local community including builders, architects and planners.

Design interpretation as an integral part of the heritage tourism experience

Whale World outsources interpretation planning, design and installation to private contractors/consultants to access expertise and ensure quality. Use of multi-sensory and high tech communication methods, such as 3D movies, audio broadcasts and guides adds appeal to the experience and increases impact on visitors.

City of Albany

Albany is located on the southern coast of Western Australia about 400 kilometres south of Perth and has a population of 31,000. It was the first colony in Western Australia, established in 1826 as a British military outpost. While the central business district has undergone some modification, there is still ample evidence of historic architecture in the form of streetscapes, churches, museum buildings and military installations. Albany has a significant military heritage. It was the embarkation point for the Australian and New Zealand armed forces expedition to Gallipoli during the First World War (see <http://www.albanyadvantage.com.au>). The Princess Royal Fortress, established in 1893 and operational until 1956, provides a tangible link to the military history of the area (see <http://www.forts.albany.wa.gov.au>). Albany receives about 376,000 overnight visitors annually.

Relevant Success Factors

The City of Albany has taken over control of most heritage tourism sites in the region. As a result, heritage management focuses more on visitor 'through put' rather than revenue from fees. This means that many of the cultural heritage sites either have no entry fees or a small nominal fee. The city is able to subsidised operation of tourism facilities using the local resident rate payer base. The local community's strong identification with the cultural heritage in the town apparently ensures this arrangement is acceptable to rate payers in the region. Management of a diverse and dispersed range of cultural heritage sites by a single not for profit entity affords the opportunity for a well integrated and coordinated regional product to be developed.

Agreed objectives and clear concepts

The City of Albany has developed a tourism strategy for 2005 to 2010. The core vision is to establish Albany as a regional destination for sustainable tourism. As sole manager of most of the Albany region heritage tourism assets, the City of Albany can function to develop individual sites in a coordinated fashion according to a single overarching plan.

Financial planning for budgeting, capital raising and price setting

Emphasis is on encouraging visitation rather than profit. Strong community attachment to place and heritage makes such use of public funds viable for the council. Strong local government support for local heritage places acts to ensure access to state and federal government funding. The usually long grant lead time for funding is incorporated into planning and works.

Effective marketing strategies based on sound market research

The City of Albany has access to the state tourism organisation's (Tourism WA) market data that provides detailed information on a region by region basis, including Albany. Albany also has a marketing plan that includes identification of key market segments and design of campaigns to attract those segments. For example, Albany is targeting Perth based baby boomers for soft adventure holidays in the region. Marketing of important 'icon' events also takes place (such as the ANZAC dawn service and other ANZAC day related events). Albany has redeveloped their website for use as a relatively cheap and globally accessible form of marketing.

Monitoring of proximity to major markets and visitor flows

Albany is on the major tour loop through the southwest of Western Australia. The distance from Perth means it serves as an overnight stop and gateway to regional protected areas. The City of Albany closely monitors tourist flows and is developing a regional tourism product to encourage longer stays in the region.

Human resource management, including paid staff and volunteers

Albany relies on volunteers to operate most of the heritage sites it manages. Sites such as the Princess Royal Fortress have a site manager employed while officers working for the City of Albany are responsible for management of many of the heritage buildings and other locations. This provides a cheap source of labour although time commitments can be limited.

Planning for product differentiation, life cycles and value adding

City of Albany underwent a re-branding exercise in 2006 (Amazing Albany) that coincided with a new-look website and brochure package. The city has also undertaken a renewal of the port's water front, currently

wasteland and industrial infrastructure, to include accommodation, retail and other commercial enterprise. This will function to connect the central business district with the water front and harbour. The development of a tourism strategy linked to regional and state tourism provides a framework for ongoing product development.

Focus on quality and authenticity of products and experiences

Access to professional archivists and historians as well as links with WA Heritage Council, National Trust and heritage interest groups (e.g. Historical Society) assist with development of quality and authenticity in products.

Engage cultural heritage and tourism expertise in conservation and promotion

City of Albany has access to professional archivists and historians, as well as marketing experts, builders and conservation experts. Revision and implementation of conservation plans ensures heritage places and artefacts are conserved in an appropriate way.

Design interpretation as an integral part of the heritage tourism experience

Interpretation development and implementation is outsourced to expert consultants to ensure quality and effectiveness. Interpretation is based on real stories/people/connections with the region. A primary focus is the city as the embarkation point for the first ANZAC expedition to Egypt and Turkey during World War One. This links into the national awareness and presumed Australian identity associated with this story.

Chapter 6

CONCLUSION AND RECOMMENDATIONS

Interviews with CHT managers and stakeholders in Victoria, Tasmania and Western Australia combined with a review of the literature identified nine key success factors in cultural heritage tourism operation. While conservation related factors were a priority, five of the nine key success factors were associated directly with business operation issues. An analysis of 284 documents addressing issues in cultural heritage demonstrated the bulk of discussion and research revolves around two of the nine success factors; issues relating to CHT objectives and concepts and quality and authenticity of heritage. The successful development of CHT operations requires a balance between business skills and maintenance of heritage integrity to the satisfaction of a range of commercially and conservation oriented stakeholders. This would suggest that, although generic business skills apply, there is a need for knowledge and skills specific to the context of cultural heritage tourism development. It would seem that discussion in the CHT literature has not yet fully moved on from the first stages of CHT development (discussing quality and authenticity within tourism and establishing objectives and concepts) to the subsequent stages of CHT operation and the associated practicalities. Given the high failure rate of cultural heritage tourism operations as discussed by Bramley (2001), Davidson and Spearritt (2000), Fallon and Kriwoken (2003), Frost (2003), Ho and McKercher (2004) Leiper (1997) and others, it would seem that generic information relating to tourism business operations has not catered to the specific requirements of CHT.

Thematic analysis of the CHT published research effort has identified a disconnect between knowledge researchers have pursued and what is required by CHT practitioners. Assuming research into cultural heritage tourism seeks to better understand the sector, and hence, provide some benefit to the sector, there appears to be too much of a continuing focus on the conceptual ramifications of tourism development on cultural heritage and not enough published research effort on how to develop and operate a sustainable cultural heritage tourism business. Redirecting focus of CHT research toward the more practical issues of CHT business operation may provide the foundation for improving the success rate in this sector.

Critical Success Factors

Key Success Factors identified from the literature and in discussion with stakeholders were as follows. They are in no specific order of importance but reflect a logical approach to the sequence of steps required for setting up a new cultural heritage tourism operation.

Agreed objectives and clear concepts

This success factor relates to the need for clear objectives for the heritage place, agreed upon and supported by key stakeholders, and development of coordinated tourism product concepts that balance both conservation and business needs.

Financial planning for budgeting, capital raising and price setting

Finances are central to the viability of the heritage place as a tourism product and focus for conservation. Requirements for adequate capital, access to grants and other sources of funding and the need for careful budgeting and financial planning are essential for continued success of an operation.

Effective marketing strategies based on sound market research

An effective marketing strategy is necessary for tourism success and is highly dependent on market research and other key success factors, including objectives and clear concepts and financial planning.

Destination and proximity to major markets and visitor flows

Several aspects were considered important including: suitable relationship to destination image and branding; adequate accessibility, visitor flows, market proximity and transport access; and proximity of other nearby businesses (clustering).

Human resource management, including paid staff and volunteers

Operations approached typically relied heavily on volunteers and part-time staff. Many may have expertise in (or passion for) the heritage in question rather than experience in tourism services and the management of commercial ventures. A range of skills, from conservation through to business skills, was considered ideal for

success. There are specific issues associated with volunteers including training, coordination, rewards, recruitment and succession.

Planning for product differentiation, life cycles and value adding

Addressing aspects of uniqueness and differentiation is important as heritage identified for its conservation value may not translate into a viable tourism product. Alternatively, it may be necessary to break down the tourist perception of ‘seen one historic house/bridge/town, seen them all’. Adding value through new experiences and/or increasing the yield may increase revenue.

Quality and authenticity of products and experiences

In this tourism product development context, quality referred primarily to the quality of the experience. Quality of experience relates to the appeal, intellectual challenge and raised level of visitor interest. Experienced quality is relative to price, the expectations of visitors and comparisons with similar ventures. It therefore combines the need for quality heritage presentation with provision of quality services.

Authenticity is a core value in heritage conservation and the tourist experience. It may be defined by the relationship between the practitioner and visitor conceptions of historical accuracy combined with visitor perceived entertainment value and how they make sense of the past.

Engage cultural heritage and tourism expertise in conservation and promotion

Successful cultural heritage tourism requires a balance between commercial imperatives and the conservation of a suite of heritage values including historic, archaeological, architectural and aesthetic significance and the significance of the sites to associated communities.

Design interpretation as an integral part of the heritage tourism experience

Interpretation provides meaning and understanding for the visitor. It is a central part of the visitor experience of cultural heritage and has significant ramifications on the quality and authenticity of a cultural heritage product. Effective interpretation requires knowledge about the heritage being presented, expertise in communication and interpretive design and the ability to create an effective interpretation plan.

Recommendations

- A greater research focus on financial planning and human resource management within the specific context of cultural heritage tourism is required to address some of the more practical aspects of CHT operation.
- Develop a manual or ‘how to’ guide for developing and improving cultural heritage tourism operations based on further development of the concepts and information in this report.
- Given the high rate of CHT operation failure, the manual could include an initial preliminary assessment tool similar to the STCRC Farm and Country Tourism Tool Kit for locations seeking to develop or commercialise a CHT experience.

Future Actions

This report identifies the specific key factors associated with successful cultural heritage tourism operations and highlights the gaps in knowledge available through the heritage literature. It forms the basis for the development of guidelines for use by those seeking to develop cultural heritage tourism operations or improve existing operations. Further funding is required to develop material in this report into an industry friendly manual. This would provide a detailed guide for development of cultural heritage tourism operations, currently not available to would-be operators.

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The 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

The 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.

The 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 researchers and industry or other users; and efficiency in the use of intellectual and other research outcomes.