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'The Benefits of Visitor and Non-Visitor Research in the Shaping of Sustainable Tourism: with special reference to Cultural Tourism'

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Introduction

The principles and challenges of sustainable tourism practice and development are powerfully exposed and discussed in international conferences such as this and in publications the world over. There is a complexity of interrelated facts and concepts, forecasts and projections:

- tools for decision making protocols in sustainability are established;
- indicators and problem solving techniques for tourist destinations are identified;
- issues that are increasingly complex and often interconnected are explored;
- sustainable mass tourism and eco tourism are terms that are conjured with;
- frameworks are developed to explore and evaluate economic and environmental impacts;
- principles of sustainable development are established and conclusions drawn

For sites of cultural and historic importance there are added pressures:

- the need to ensure survival of cultural and historic sites in cities with mass tourism are discussed;
- historic cities need to forge an effective alliance between their historical infrastructure and the impact of mass tourism;
- balancing the needs of visitors and indigenous cultures

This paper explores a strategically important concept that is often less well defined in publication or discussion in conference, that of understanding your audience, your visitors and importantly, your non-visitors. We will argue that the benefits, value and applicability of visitor and non-visitor research to the global tourism industry is of paramount importance and will inform management policy, financial decision-making and strategic planning for sustainable tourism management. We present the need to identify, test and develop practices and methodologies for visitor studies that are crucial to sustaining tourism and destination management. Data drawn from such research can be disseminated to policy makers, educators, designers, environmentalists and the wider stakeholder community. We advocate training in all aspects of visitor research for those who are developing careers in the leisure

industry and suggest visitor studies should be included as a core module in post-graduate training in this sector.

Aim of the paper
Our premise in this paper is that if sustainable tourism development and management is to meet the needs of both the present and the future then it is equally important to prioritise research on those who visit tourism destinations (and include those that do not visit) and for stakeholders to use that data in strategic planning. Decision makers must balance the needs of sustainability with research data drawn also from an increasingly complex set of visitor associated issues, such as design/interpretation, experience, expectation and assumptions. There should be a sound grasp of the reasons why potential visitors have declined to visit as this may well identify new sectors and innovative responses that aid responsible sustainability.

- The aim of this paper is therefore to stimulate a dialogue for the advance of visitor study research as a strategic tool in the armoury of those who make decisions in tourism and destination management and for visitor studies to be included as core to the curriculum of those offering training in the field.

This paper will reflect on a number of these aspects.

Sustainability and Tourism
Everyone agrees that sustainability is a good thing as 'it engages the whole of human existence and the complexity of inter-relationships which make up this universe' (Brandon 2000). Sustainable development is based on concepts such as meeting human needs, providing quality of life for all and equitable distribution of resources within the carrying capacity of the earth (du Plessis 2000) There are a myriad complexities in issues of sustainability but undoubtedly people, audiences, visitors and 'tourists' should be included at the centre of principles of sustainable tourism management and development.

The debate concerning sustainable tourism appears to be a phenomenon initiated during the 1980's (Mathieson and Wall, 1982) and emphasised the diverse environmental, economic and social structures. There are numerous key texts and readers which explore this aspect and critique contemporary issues.(see Brandon et al 2000, Bramwell et al, 1996, Priestley et al, 1996, Harrison & Husbands, 1996, Prentice, 1993, Page & Dowling, 2002) Tribe, (2002) suggests that sustainable tourism is actually a 'subset of ethical tourism and possesses a developing set of defined core values'. They identify a number of dimensions. Most offer rationales for sustainable tourism and contemplate a range of possible definitions of the concept, yet few address the need to get to grips with finding out who your visitors are in tourist destinations such as museums and heritage sites, beyond the usual predictable 'inward-looking annual survey' (Fyall et al 2003).

Understanding the visitor experience of place is fundamentally important, and this has been variously conceptualised over a number of years (Schofield, 1996; Bicknell and Famelo, 1993; Gunn, 1988; Jefferson and Lickorish, 1988; Medlik and Middleton, 1973). The overriding message is that the visitor's experience of place is not necessarily product oriented, but a complex interaction of motivations, beliefs, perceptions, assumptions and satisfaction.

Visitors may include holidaymakers, recreational visitors, business people and professionals, friends and family visitors, students, religious pilgrims, children on school trips and transit visitors en route elsewhere (Middleton and Hawkins 1998). There will be multi-generational groups and single visitors with a multitude of cultural identities, experiences and behaviours. There is the impact also for residents in historic centres especially those new to tourism. (Simpson, 1999) Along with other users, they utilise a tourist destination from a variety of shifting perspectives. This is a complex area of study.

A tourist visit to an historic city such as Venice, London or Barcelona may well be increasingly viewed as an experiential process, taking the visitor beyond the consumption of the buildings and cultural sites into the realms of the service experience, to expectations and assumptions beyond which can be provided. Often the impact of increasing visitor numbers on cities such as Venice or historic sites such as Stonehenge in the UK, or cultural landscapes such as National Parks destroys the very fabric that visitors want to see. (Anfield, J 1994) As visitor numbers increase, difficult decisions have to be made to adjust policies that adhere to the principles of sustainability. (Croft 1994)

There is a paucity of research on those who do not visit and few links with tourism management and sustainability. There is little understanding of how such visitor data might be used, or the validity of its findings to aid decision making for planning, design and future development. There is little understanding of how data on those who do not visit can translate into market opportunity and the development of new audiences,

Visitor Research as a Strategic Tool to Aid Sustainability : The Benefits
There are many different aspects to visitor research and non-visitor research and some are explored here. The benefits of conducting visitor research are many:

- You will have reliable facts to work with rather than assumptions
- You can test a number of variables – e.g effectiveness, expectation, perception, value
- Facts will help inform the strategic decision making process across a range of stakeholders which in turn will aid sustainability
- Research data will inform a feasibility study for sustainable development
- Research will aid management decision making and accountability
- Research facts are a performance indicator
- Research data is important for design conscious investment

Conducting Visitor Research: The Importance of all Stakeholders
The process of visitor research should be multi-faceted in that data collected must be included as part of the equation by decision-makers, fund-holders and key stakeholders. Goals must be set for visitor management which in turn will lead to sustainable initiatives being developed, encouraging participation and feedback (Jelen and Hayward, 1996).

There needs to be a relationship between the interests and aspirations of all interested parties, including stakeholders, those who visit and those who do not. Sustainable tourist destinations are not the context for the quick fix in terms of visitor research, but for careful long term planning, specific integrated responsibility and sustainable design. The involvement of the local community is crucial in helping explore themes of common interest reflecting present need and chronicling local needs for the future appropriately. It is important not to take a 'top-down approach that merely uses local colour to expand the coffers of a tourism promoter.' (Williamson, 1995) Commentators acknowledge that everyone in a community

has co-responsibility for the well being of that community and where decisions will affect the community there must be consensus (du Plessis 2000).

The Need to Apply Research Results
Gathering evidence to build up a profile on visitors and non-visitors should only be considered as a first step in the management and decision making process. It is also vital to apply research results. (Jelen and Hayward, 1996) Oftentimes the findings of research data will challenge long-held perceptions and the temptation is to shelve findings rather than implement them. The greater challenge is to get decision makers and stakeholders to take research findings seriously (Jelen and Hayward, 1996).

As an example Edinburgh, the primary gateway to Scotland and a magnet for tourism for many decades, ranks amongst the major cities of the world in terms of its history and architecture. It is also a modern and vibrant city and plays a key role in attracting overseas visitors to the UK. However, by the 1980s it had begun to slip into downward spiral of derelict buildings, gap sites and run down arterial routes into the city centre. In commercial terms alone at the end of the 1990s some £340 million contribution to the local economy was at stake including 20,000 jobs in the city alone. A comprehensive programme of physical improvements was necessary, coupled with customer care and staff development programmes in order to transform Edinburgh's Old Town.

A forum for partnership and development was established whereby visitors demands on the area continue to be balanced with the practical daily requirements of residents, commuters and other user groups. By conducting research and examining visitor numbers- some 8 million per year in the late 1990s- it emerged that the size of the pedestrian carriageway needed to be increased. This was achieved through sensitive design and the use of traditional and sustainable materials. By discouraging through traffic and utilising innovative traffic management techniques, a new civic space has been created that is used day and night, and includes an array of café bars and street entertainment that lend the centre a cosmopolitan atmosphere. The projects are starting to have the desired effect of encouraging more people to visit, to stay longer and purchase more locally produced goods and services and to visit more frequently. Critically, visitor research studies have shown that the quality and ambience of a visit to the Old Town in Edinburgh has improved, with many people exploring the city on foot. This reflects the successful creation of a safe, clean and attractive environment that is vital for a sustainable future (Downie R in Middleton and Hawkins 1998).

At the Stonehenge site in the UK, visitor research conducted for English Heritage established the speed at which visitors strolled round the site, the size of groups and the distances people maintained from each other. Before the research, the pathway around the site was roped on both sides as an aid to site management. The grass became very worn by the pressure of visitor numbers and unsightly. Visitors felt too regimented. It was felt that a wider path may well be the solution and the research project gathered evidence on determining how wide the pathway should be. The concept of personal space was tested (influenced by culture, race, gender and personality) and crowding as they have an effect on the visitor's feelings and satisfaction. The result of the study was extremely useful in that it established comprehensive data that aided visitor pressure management. Pathways at such historic landscape sites were re-designed and as a result damage was minimised and visitors were more comfortable and relaxed.(McManus, 1998)

Visitor Management

We have already noted that visitor destinations derive their customers from a broad spectrum of customer types. For visitor management purposes, and especially in mature market conditions, it is important to identify and measure these sub-markets or segments in terms of their key variables and patterns of behaviour. Behaviour will reflect, for example seasonality, visitor ages, socio-economic status, psychographic features, length of time away from home and distance travelled (Middleton and Hawkins 1998).Individual attractions and enclosed resorts such as Disneyland can to some extent specify the segments they target with precision but non-enclosed destinations such as the historic city have to cope with a far broader range of segments; as a consequence the selection and targeting of specific purposes is a key management issue. Research data will aid the management decision-making process,

Visitor Segments and Sustainable Tourism Initiatives

Some visitor segments will be actively targeted for promotion, some discouraged and possibly controlled and some will need to be planned for because visitors will arrive anyway. By developing products and visitor experiences in response to known behaviour patterns for homogeneous segments, sustainability is more likely to become an achievable goal than if visitors are treated as one heterogeneous whole. By responding to a visitor's knowledge base, attitudes and behaviours, a framework for effective sustainability can be built into management practice. Effective visitor management for sustainable tourism involves targeting groups that maximise the benefits and minimise damage.

Why include Non-visitor Research?

Should current strategy, initiatives and future developments be led by the opinions and experiences of only those who visit? What about those who choose not to visit? Their contribution may be as or even more valuable in advancing frameworks for sustainability and may well be of crucial important for future planning. Different levels of information are crucial as it would 'be dangerous to promote a single view or perspective of a problem which is so complex' (Brandon 2000). If we can identify aspects to promote sustainability drawn from a wider public or from future users this will give a variety of perspectives to feedback into the decision making process.

In the case of non-visiting in cultural attractions there are a number of caveats worth exploring. First, it should be recognised that visiting a cultural destination may be perceived as sending out a social signal, a sign of status and that the reasons given for not visiting may be geared more towards how they might be interpreted than towards providing a truthful response. For example a visitor who claims not to have the time to visit a cultural attraction such as an art gallery may actually not have any interest in art but does not wish to be perceived as such. As a further example, it has been shown that a person's childhood experience of museums may well have a direct effect on their adult involvement. (Yoesting and Burkhead, 1973) The problem may be magnified when research is conducted in a group setting such as a focus group where the individual is likely to respond in a manner that the group will find acceptable, usually referred to as indexicality. Secondly, the reason given for non-visiting may conceal the real reasons for not visiting; for example lack of time may really be an excuse. Even a respondent who claims to visit an historic city may in fact only view it from the coach window (Schofield 1996).

Identifying Your Visitors (and Non-Visitors) : Methods and Practical Approaches

Visitor studies are many and varied. There are short term projects, exploratory, comparative and longitudinal studies. There are a number of research methods, both qualitative and quantitative, that are appropriate and can be used in a variety of projects. These may well include surveys, observation and focus group exercises. The use of CCTV as a research method is one of a number of recent innovative methodologies (Beaumont, 2004). Another example includes 'mindfulness as a tool for managing visitors to tourist destinations' (Frauman and Norman, 2004) who suggest that a visitor's level of mindfulness towards a natural, cultural or historically based setting may influence and be a vital ingredient for sustainable destinations. Family Group visiting research as a distinct sector is now also firmly on the agenda (Sterry, 2004) with the potential to influence and educate multi-generational visitors and promote sustainable settings.

There has been a proliferation of research studies in recent years on visitors to cultural attractions and other publicly funded institutions, particularly in the US and UK, not only reflecting the importance of this vital discipline but also the need for accountability and evidence of best value. Such studies provide an understanding of the motivation, attitude, learning, perception, culture, demographics and background of the visitor, all variables crucial to future planning.

There are many different aspects to visitor research such as recording motivation, perception and attitude, which are more useful than just collecting visitor numbers and establishing general satisfaction with a visit (Bicknell and Famelo, 1993, Hooper- Greenhill 1995). Visitor numbers as a measure of success are a useful indicator but can mask, for example, the extent of non-visiting by under-represented groups. Research undertaken with under represented groups can result in a greater awareness of an attraction and an increase in visiting. Commentators are clear that a visitor-orientated approach to research in terms of experiential consumption leads to success in an increasingly competitive market place (Beeho and Prentice 1995). Research can aid the design process (Sterry 1999, McManus, 1998, Harvey, Marino and Loomis 1996), can explore visitors perception and attitude towards nature conservation (Taylor 1993, Birney 1993), and test the effectiveness of communication on blind visitors (Ascencio, M and Simon, C (1996) to name but a few examples.

The following examples are drawn from studies within the cultural heritage sector. However they may well have resonance for sustainability issues appropriate to the theme of this conference.

Research into non-visiting or latent visiting behaviour within the cultural heritage sector has sought to identify reasons for non-visiting, which include issues of access, domestic responsibility and competition from other leisure pursuits (Cragg, Ross and Dawson et al, 1993). Gutman (1982) links the individual's propensity to visit a museum, for example, with aspects of cognitive structure such as a desire to be seen as a responsible parent. Research could provide a framework for changing attitudes and behaviours on issues of sustainability with parents and children who may well not be aware of non-renewable resources.

Hood (1983) concluded that the individual's 'leisure agenda' is key to understanding visiting and non-visiting behaviour. In her study of American non-visitor motivations in respect of museums she found that the non-visitors leisure agendas included being with people (social interaction), actively participating and feeling comfortable in their surroundings – none of these experiences were considered as being offered by museums. In contrast museum visitors

saw museums as capable of satisfying their leisure agendas, which included opportunities to learn, the challenges of new experiences and doing something worthwhile in their leisure time. It may well be that targeting non-visitors to a city on decision making for the local environment or the protection and conservation of historic sites will achieve optimum results via a participatory process.

There is little published research on non-visitors. As budgets are stretched for accountability, projects are commissioned to shed light on those who do visit rather than non-visitors. Those studies published identify varied factors that inhibit visiting including cultural sites that have a sense of alienation, places that are unwelcoming and boring, of little relevance to ethnic cultures, a lack of awareness of what is available, apathy, no disabled access, unhelpful, intimidating staff, and lack of refreshment areas. (London Museums Service 1991)

Davies and Prentice (1995) propose a *columnar model* of non-visiting behaviour based on hierarchies of motivations and constraints and designed to provide a framework for the understanding and investigation of non-visitors to heritage attractions. Categories of occasional and non-visitors (visiting behaviour) are further categorised according to their motivation to visit and the extent to which they have succeeded in overcoming constraints to visiting. The resultant framework facilitates an understanding of the complex interactions that occur between the motivations and constraints that govern the decision to visit, and enables the planner to produce effective methods of segmenting the non-visitor base for future market development.

But should we restrict visitor analysis simply to visitors and non-visitors? Some commentators reject the idea that only two audience segments exist and propose that demand is made up of frequent visitors, occasional visitors and non-visitors. (Hood, 1983, Schafer, 1996) Others break down non-visitors further into those who never visit and never contemplate visiting, those who have visited once but subsequently have never visited heritage attractions and those who infrequently visit (Davies and Prentice, 1995). The implication here is that there may be key non-visitor segments exhibiting very similar motivations to the current visitor base – for example those who have visited once but who have never subsequently visited - and it may require very little effort or resources to convert these into visitors. Conversely there may be some non- visitor group that will never merit attention. It may be useful to conceptualise the range of visitor and non- visitors in terms of a visiting continuum at one end, non-visitors who would never consider visiting through to frequent visitors at the other extreme. Priority can then be assigned to the various groups in terms of their likelihood of conversion into visitors and eventual visitor advocates.

The study of latent visiting is inherently more difficult than the study of visitors. Detractors have pointed to problems of accessibility to non- visiting groups, and this is a key issue in designing a research study in this area. Prior studies have utilised interviews with individuals who turn away from the gates of an attraction, others have used focus groups of non-visitors; the latter are potentially fraught with problems of indexicality and veracity as outlined earlier. In terms of visitor and non-visitor research studies as a tool for sustainable decision making in cities, we should also take account of the stakeholders opinion as these too have an implication in the overall strategies presented for inclusion in the wider scenario. "Sustainable development will not be achieved through mechanistic problem solving which fixes the parts without contemplating the effect of the fix on the whole" (Du Plessis 2000)

Empirical Research Design Model
In the concluding section of this paper we outline an empirical research design model that may well be appropriate to use across a range of research projects. Our assertion is, that in order to secure sustainable tourism development and management, stakeholders need to underpin their plans for sustainability with sound visitor research and should be receptive to new ideas for planning in this area. By exploring research data drawn from those who visit tourism sites with those who do not, planners are able to gain a more complete perspective with research based on empirical data rather than supposition or conjecture. Staff training will need to be included.

Proposed Model
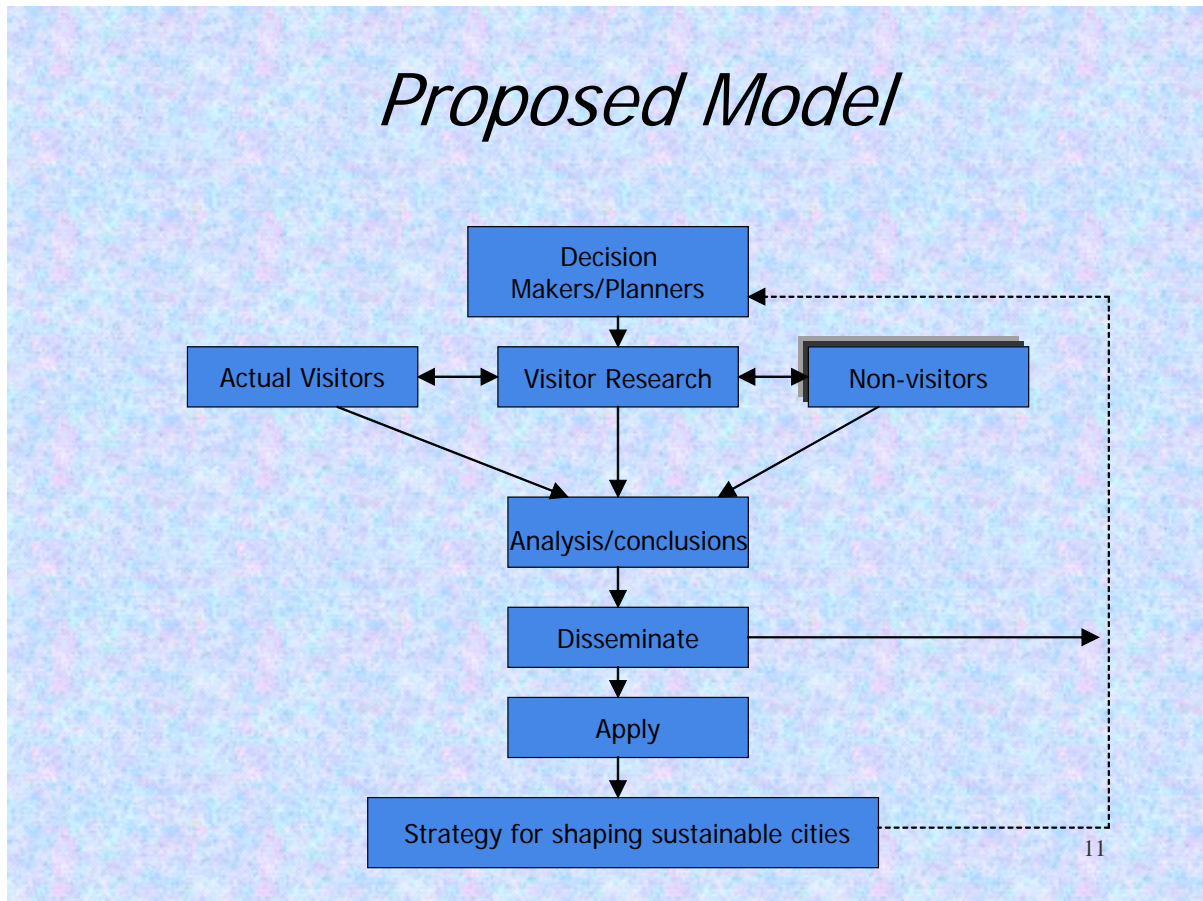
Visitor Research Model for Sustainable Tourism Strategy

The model illustrates that both visitor and non-visitor research data should be included as twin inputs to the planning and decision making process. Analysis and conclusions of the research findings should be disseminated to key decision-makers in an organisation, at which point amendments and revisions to the planning process would be necessary. There may well be a need to revisit aspects and refine data. Once the findings are analysed and disseminated they become a vital input to the formulation of future development strategies; these strategies can then be further evaluated and the results fed back into a new cycle of decision-making activity.

However, we recognise that there are limitations to the proposed model. We know that the planning process cannot be represented as a series of sequential stages when in fact some of the stages may occur contemporaneously. The model may also oversimplify what is essentially a fairly complex process involving many other considerations such as the existence of several types of influential stakeholder groups. Strategic planning itself may be

viewed as something of a futile exercise given that "the requirements of fulfilling human needs, providing certain standards of living and quality of life for all…are on a collision course with the requirement of living within the carrying capacity of the Earth" and that an attempt to relieve one set of problems often sets the stage for others (du Plessis 2000). To undertake such research would need a visionary management team and strategic planning with all stakeholders to develop future opportunities and dynamic visitor experiences.

Conclusion

There is an obvious need for visitor research and importantly finding out why people choose not to visit. Non-visitors are your potential new visitors. We need to adopt methods of enquiry that address exactly what constitutes a tourist visit to a city or a specific attraction and this means moving beyond the conventional market research and number crunching. There is a need to explore in detail how patterns of visitor choice change over time as a result of changes in the tourism leisure and entertainment marketplace. The process is not linear, neither is it one-dimensional. Research that addresses a whole range of variables would provide us with a more rounded picture of visitor and non-visitor behaviour, informing policy makers and planners at all levels. Equally the same insights would put policy making on a more robust footing and facilitate an integrated approach to the development of strategies for sustainable tourism.

End-Note

As a final note we wanted to add that we, the authors of this paper, are firmly committed to the discipline of visitor studies and its importance in a number of related disciplines, including sustainable tourism development and the management of tourism destinations. We include visitor studies as a core module in our own postgraduate training programmes in The Centre for Heritage Studies, University of Salford, UK. Our graduates have used that expertise to initiate visitor research in many cultural destinations both in the UK and other countries. We are involved in major research projects working with museums and Art Galleries (such as the Victoria and Albert Museum in London and Imperial War Museum North) and offer consultancy and short courses for in-house training. We have initiated a Centre for Audience and Visitor Research (*Vis A Vis*) at the University of Salford and have on-site a comprehensive archive of related material with open access for researchers. We would be happy to offer our expertise in any initiatives, training and future planning.

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