Title: Assessing the prospects of the regional theatre tourist market: lessons from the literature
Author: A. Williams
Author Address: awilliams@csu.edu.au
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Abstract: Rural and regional communities have been and will continue to be faced with many challenges (Pritchard and McManus, 2000) including economic change (most recently petrol price increases and interest rate rises), demographic change (out migration and aging), the resulting loss of social capital, (Walmsley, 2003) and the continual environmental problems such as water shortage. Given this scenario it is not surprising that there is a strong focus on the prospective value that tourism can deliver to rural and regional communities. However, like all open markets, regional tourism is a very competitive sector and rural and regional communities need to continually explore strategies to improve the drawing power and market positioning of each region in comparison to alternative regional and urban destination choices. This paper examines the literature to assess the prospects of repositioning a presently very successful regional theatre company into a primary tourism product with standalone drawing power. The paper concludes that theatre can certainly be a standalone tourism draw card, but traditionally this has been the case in urban areas and thus the regional location creates a challenge but is not insurmountable. The author submits that this challenge can be significantly reduced when an improved understanding of the typology of this potential new market ' regional theatre tourist is achieved. To this end the paper provides a detailed interpretation of this potential tourism segment and explores the potential of this market from a regional perspective. Also the paper will be a valuable source of information to assist regional tourism authorities wish to explore a stronger relationship with the cultural tourism product.
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ABSTRACT

Rural and regional communities have been and will continue to be faced with many challenges (Pritchard and McManus, 2000) including economic change (most recently petrol price increases and interest rate rises), demographic change (out migration and aging), the resulting loss of social capital, (Walmsley, 2003) and the continual environmental problems such as water shortage. Given this scenario it is not surprising that there is a strong focus on the prospective value that tourism can deliver to rural and regional communities. However, like all open markets, regional tourism is a very competitive sector and rural and regional communities need to continually explore strategies to improve the drawing power and market positioning of each region in comparison to alternative regional and urban destination choices. This paper examines the literature to assess the prospects of repositioning a presently very successful regional theatre company into a primary tourism product with standalone drawing power. The paper concludes that theatre can certainly be a standalone tourism draw card, but traditionally this has been the case in urban areas and thus the regional location creates a challenge but is not insurmountable. The author submits that this challenge can be significantly reduced when an improved understanding of the typology of this potential new market – regional theatre tourist is achieved. To this end the paper provides a detailed interpretation of this potential tourism segment and explores the potential of this market from a regional perspective. Also the paper will be a valuable source of information to assist regional tourism authorities wish to explore a stronger relationship with the cultural tourism product.

INTRODUCTION

Regional and rural communities of Australia are faced with the ongoing challenges of maintaining sustainable economic environments to ensure long-term survival of the individual communities. Key challenges facing these regional and rural communities include but are not limited to economic change (most recently petrol price increases and interest rate rises), demographic change (out migration and aging), the resulting loss of social capital, (Walmsley, 2003) and the continual environmental problems such as water shortage. Although not felt by regional and rural communities in isolation these challenges may be more significant to these communities due to higher reliance on the natural environment and their geographic isolation from the higher populated and serviced urban centres. Consequently, regional and rural centres and towns have looked to tourism as an alternative economic contributor in a bid to maintain sustainable communities (Smith and Krannich 1998).

Many rural and regional communities have been very successful in developing a healthy tourism sector contributing significantly to the overall sustainability of the town and surrounding region. One such example is Albury Wodonga, which is situated on the New South Wales and Victorian
boarder and has a total population of approximately 75,000 residents. The immediate surrounding area, being predominately rural, is dispersed with small townships bringing the total population close to 100,000. The tourism industry generates approximately $160 million revenue annually, and attracts approximately 1,400,000 visitors per year (Investment Albury Wodonga, 2002). Albury Wodonga has its background as a transit destination with the Hume highway running right through the centre, and being 3.5 hours from Melbourne and Canberra, and 6 hours from Sydney, 3 of Australia’s largest urban centres. However, over time Albury Wodonga and surrounding area has been able to refine the tourism offering in order to enable the region to attract an increase in primary tourists, who visit Albury Wodonga and the region as their first choice. The tourist product is varied but is predominately based around water sports performed on the Hume Weir and the Murray River, outdoor activities, sport of all types, rural and farm based offerings, winery visits, local produce markets, shopping and night time entertainment. Additionally, Albury possesses a strongly developed street cafe’ and alfresco dinning culture, as well the area is home to a number of museums and a distinguished regional art gallery. Although relatively successful as a tourist destination, the Albury Wodonga and surrounding tourism experience could be substituted by many other towns situated on the Murray river in regional Victoria and NSW and thus, there is a need to continually explore opportunities to differentiate the product offering to ensure continued competitive advantage in the regional tourism market.

Albury Wodonga is also the home of ‘HotHouse Theatre’ the leading regional theatre company in Australia (RMIT 2004). Support by the local community for ‘HotHouse’ has always been strong with excellent box office results, which are due no doubt in part to the innovative management strategies applied by the Board of Directors, Artistic Directorate and staff of the theatre. These strategies include the varied programming of performances from comedy to drama both locally produced and visiting national productions, programs for emerging young artists of the region, a strong commitment to local involvement and locally produced work and regional tours. There is little doubt that ‘HotHouse’ is a significant cultural resource for the Albury Wodonga region (HotHouse 2006). However, anecdotal evidence suggests that the ‘HotHouse Theatre’ and its variety of experiences although unique to the region and regional Australia has demonstrated limited primary tourism drawing power.

By drawing on existing literature both industry/government and academic this paper aims to explore the possibility of developing a significant regional theatre tourism product in the Albury Wodonga region. To gain an understanding of the regional theatre tourism market various fields of literature are considered including typologies of cultural tourists, theatre audiences and the regional tourist. Also previous expose’ of theatre and tourism relationships and outcomes are considered. The paper provides significant contribution to the literature in the area of theatre and tourism as it draws together and analyses secondary data relating to motivations and trends of cultural and theatre tourists from a wide variety of previously disconnected sources into one resource. Also to date little focus has been placed on a regional situation with all previous work being undertaken in urban theatre precincts. Additionally, the paper provides useful insight for regional tourism management in the areas of product renewal/rejuvenation and motivational analysis of this potential market.
There is considerable international evidence that theatre can have a strong drawing power. Gapinski (1988) demonstrates that without the tourist many of the theatres in the West End of London would not be nearly as viable with up to 65% of the audiences at all SWET (Society of West End Theatre) theatres being tourists (both domestic and international). The importance of the tourist audiences was also brought home to Broadway in the weeks immediately following 9/11, which saw a severe reduction in the numbers of inbound and domestic flights resulting in reduced tourists numbers and a significantly lower attendance rate (Bennett, 2005). Similarly, Hughes (1998) stated an indication of the domestic drawing power of West End theatres is demonstrated by the number of specialist tourist operators successfully offering theatre packages (tickets, accommodation and transport) especially aimed at the domestic market. This can also be seen in Australia with bus companies, airlines and accommodation houses combining to create a total theatre package aimed specifically at the domestic market (Qantas 2005).

All the above cited successful theatre and tourism examples occur in a metropolitan environment. Additionally, the style of theatre product that has demonstrated the strongest tourist drawing power has been big budget; long running shows such as the musical Lion King (Bennett 2005; Hughes 1998). To date there has been little if any evidence of a regional theatre company being able to develop a similar positive relationship with tourism. This is in part due to the fact that there are very few successful regional theatres operating due to the set-up and ongoing costs of such an undertaking. Also the lower population in regional areas frequently leads to an inability to maintain the level of audience to sustain the theatre long term.

Additionally, from a tourism perspective, attracting theatre tourists may have little relation to the importance of the theatre, but have more to do with the other elements of a destination and a variety of motives of the tourist (Hughes 1998). As Bennett (2005) stated “For tourism, theatre’s importance may not be the artistic product per se but what it contributes literally and symbolically to the contextual environment”. A successful and flourishing theatre precinct contributes significantly to a city’s image and subsequently, from a tourism perspective the city’s positioning in regards to other alternative city’s or destinations. Thus successfully combining tourism with theatre requires the theatre element to be an intricate part of the total ‘brand architecture’ of the city (Bennett 2005). The trick is to match the total image of the destination with the ‘bundle’ of motives held by the prospective market.

TYPOLOGIES OF THE PROSPECTIVE MARKET
An important step in ascertaining the likely success of any new product is to gain a clear and accurate picture of the market. An understanding of key characteristics such as size of potential market, present and future trends and motivations helps build a framework to ascertain the likely prospects of a new market. To this end the following provides a snapshot analysis of the potential regional theatre tourism market for Albury Wodonga and region.

Profile of present tourists to Albury Wodonga and region

Present visitation patterns and motivations provide insight into the general broad profile of the likely future visitors, as it would be unlikely for a regional destination to create such a change in destination image and drawing power that a completely different sector will be attracted. Therefore, it can be expected that the regional theatre tourism market although holding some unique characteristics will for the most part be similar in many aspects to the present tourist visiting the region.

A profile of the present visitor to the Albury Wodonga region can be drawn from research publications published by both Tourism New South Wales and Tourism Victoria (which are the peak bodies of the two states that meet at Albury Wodonga). A typical tourist would have the following profile: they would be domestic and reside most likely in Victoria or southern New South Wales (little international visitation). They would likely travel as a couple and be aged 25 to 64 with a large percentage being parents. They would travel by private vehicle, have a higher than the national average likelihood of eating out at restaurants and visiting pubs, clubs and discos. Their likely spending per person per night would be in the vicinity of $98.00 to $103.00 and they would on average stay for 2.8 nights. There main purpose for visiting the region was identified as holiday or leisure at 45% with visiting friends and relatives registering higher than the national average at 38%. Their psychographic profile would place them most likely in one of 3 value segments identified by Roy Morgan Research (1997); Traditional Family Life (24%), Visible Achievement (22%) and Socially Aware (21%). With respect to tourism data collected in Australia, tourists who attend theatre are classified as cultural tourists. Only a very small number would be classified as cultural tourists (5%) (Tourism Victoria 2005a & 2006; Tourism New South Wales 2005).

Cultural tourist profile

The category of cultural tourist encompasses a wide range of activities and types of visitors regardless of their motivations (Hughes 2002). Tourism Victoria (2005b) defines cultural tourists as ....attending theatre, concerts or other performing arts, visit museums or art galleries, visit art or craft workshops or studios, attend festivals, fairs or cultural events, experience aboriginal art or craft
and cultural displays, visit an aboriginal site or community, visit history, heritage buildings and sites or monuments, and attend aboriginal performances. The stand out motivation for domestic cultural tourists visiting Victoria in 2004 was to gain relaxation and enjoyment (75%) with socialising with friends and experiencing quality art being the second most mentioned motivations (37%). Other important motivations identified for domestic cultural tourists were learning about other cultures, celebrating heritage or accompanying a partner (Tourism Victoria 2004). There psychographic profile would place them in one of four value segments; Socially Aware, Visible Achievement, Traditionally Family Life and Young Optimism (Roy Morgan Research 1997).

This very broad definition although inclusive has the potential to create considerable confusion particularly from the supply side and the development of marketing strategy (Hughes 2002), as it is unlikely that there is one marketing strategy applicable to all types of cultural tourist motivations. Additionally, as anyone who visits an historical site, museum or art gallery is included as a cultural tourist it is very likely that the figures for cultural tourists are overstated, particularly for those primarily motivated by a cultural experience. This may lead to misleading views about trends and the strength of the relationship between culture and tourism (Hughes 2002). Tends in Australia show that 46% of international tourists participate in culture and heritage based tourism. More significant for this study, is that only 11% of all domestic tourism that results in an overnight stay participate in cultural tourism. Interestingly, those that do engage in cultural experiences while on holidays, also do so when at home (Tourism Australia 2005). Additionally, when main purpose of trip is examined for domestic visitors to Victoria only 1% indicated that visiting a cultural attraction was the the key reason for travel (Tourism Victoria, 2004). It would seem that a cultural experience for domestic tourists is not a high priority.

Theatre tourist

Specific to the Albury Wodonga cultural tourism market is the presents of a very successful theatre company HotHouse Theatre. Thus it is further necessary to explore beyond the general and broad boundaries of the cultural tourist to gain insight into the motivations and trends of the theatre tourist. To this end Hughes (2002) presented a framework to assist further examination of the cultural tourism market. The framework developed by Hughes builds on other author’s works including McKercher (2002) and Silberberg (1995) by focusing on one cultural tourism activity; performing arts and thus being particularly relevant to this paper. The framework divides the performing arts tourism market into two distinct groups; cultural-core (cultural is the core or primary motivation for visiting a destination) and cultural-peripheral (culture is not the primary motivation but only on the periphery of their visit). Within the cultural-core tourists Hughes identifies 2 levels; those where cultural is the single or primary drawing power and those where culture is a significant drawing power equal to other reasons for visiting the region.
The cultural-peripheral tourist is also broken into 2 distinct categories of incidental and accidental. These titles are fairly self-explanatory with the first occurring when engaging in cultural activities was a minor motivation behind the visit but as a secondary activity while visiting the region. The accidental cultural-peripheral tourist is one who did not have any motivations or plans to visit or experience cultural tourism but nether the less visit a cultural attraction along the way.

It would seem from this framework that regional theatre tourists would fall into the cultural core category as it is usually necessary to book theatre tickets prior to planning the trip (to ensure a seat) which possibly indicates the theatre experience would be a primary or at least equally significant drawing power for the visit. Strengthening this position is that 62% of general theatre audiences book their tickets from 2 weeks to 2 months in advance of attending the performance (Arts Victoria, 1996).

If theatre tourists are likely to fall into Hughes cultural-core tourist category it would seem reasonable that their motivations for participating in theatre tourism would not be far removed from the general theatre audience, since attendance at the theatre is either a primary or equally significant draw card.

Motivations for attending theatre

Research conducted on audience attendance at Victorian theatres showed that 23% of all Victorians attended the theatre at least once in that year (Arts Victoria 1996). For the state of NSW the overall attendance level was slightly lower at 17.5%. Within the regional area of Murray-Murrumbidgee, which Albury Wodonga is a part of the theatre attendance for 2002 was 13.9% of the total population (Australian Government cultural and recreational 2002). The key market for theatre is women aged between 35 and 49 with a tertiary qualification and belonging to the ‘Socially Aware’ value segment as defined by Roy Morgan Research (1997). The main motivation given by audiences across all styles of theatre (mainstream, fringe and theatre in the park) was the entertainment received. Other important motivations were found to be positive reputation of the team/cast or production and affirmative word of mouth. With 48% of those attending theatre in Victoria indicating that they first heard about the productions by way of friend or college, word of mouth coupled with opinion leadership and reference group influence would appear to be a key tool in motivating potential theatre attendance. Also theatre audiences indicated that they were likely to attend other culturally related activities like film and music festivals on a regular basis (Arts Victoria 2002).

Although those who attend theatre in the two states of Australia outlined above are not in the majority of the population there is certainly a healthy populus engaging in this style of
entertainment. However, it would seem that when domestic tourists are planning on or are undertaking a holiday they do not appear in general to seek out cultural or theatre style experiences as a primary motivation for travel.

**Australian domestic theatre tourist trends**

Presently, cultural tourism data collected on a national and state level within Australia makes it difficult to apply Hughes framework as it is not clear from the data whether culture was the primary reason for visiting a destination. Also as the data is very general the tourism drawing power of theatre is impossible to gauge. However, one study undertaken in South Australia which focused on attendance at the 1996 Adelaide Festival (a performing arts based festival) indicated that just over half of the audience would be classed as culture-peripheral as the festival experience was not perceived to be the main reason for visiting Adelaide (cited in Hughes 2002). Additionally, national domestic tourism data shows that in 2005 domestic overnight stays by tourists classed as cultural tourism only accounted for 11%. Of these visitors only 21% of the total domestic cultural tourists attended theatre or other live performances (Tourism Australia 2005a). It is also interesting to note that top ten activities engaged in by domestic tourists on a national basis do not include any form of cultural activities. Social activities such as eating and drinking at restaurants and shopping were ranked in the top 3 with beach and bushwalking among the top ten activities (Tourism Australia 2005b). This evidence would seem to strengthen Hughes (2002 p. 171) argument that “...most cultural tourists are neither culture-core nor culture-peripheral (at least with respect to the performing arts) as it would appear most do not go to the theatre”. It would seem this is the case particularly with the Australian domestic tourist.

**DISCUSSION AND CONCLUSION**

**Prospects for regional theatre tourist product**

If as Hughes suggests the overall cultural figure is generally overstated due to the broad manner in which data is collected, then any potential cultural tourism market for Albury Wodonga may at first glance be insignificant and thus not worth pursuing. However, if the development of a cultural tourism product could increase the present visitation which stands at approximately 1,400,000 (Investment Albury Wodonga 2003) to the region by just 1%, coupled with the present spending levels of approximately $100 per person per night, the new economic contribution to Albury Wodonga and region would be just under 1.5 million dollars per year. This is only first round spending and also does not take into account gains made in the area of social and cultural inputs and the contribution this new product will have in differentiating and strengthening the Albury Wodonga and regions image in the highly competitive domestic market. Therefore, the regional theatre
tourism market although of a niche’ nature would appear to be worthy of further analysis and possible pursuit. This is especially the case due to the presence of an existing successful regional theatre that is already demonstrating a unique competitive advantage not only in the regional areas of Australia but also on a national basis.

There is no doubt that Albury Wodonga has a very well established and successful regional theatre product to offer the tourism sector. However, the challenge for this region is to attract the domestic tourist who would appear to have little motivation to experience any aspects of culture when on holidays, let alone a theatre experience. Future success will rely heavily on the ability to integrate the theatre tourism offering into the package of experiences desired by the prospective market.

It is clear from the literature that for most theatre audiences, theatre and cultural tourists the cultural or theatre experiences are not necessarily the sole or primary motivator to engage in these activities. For cultural tourists relaxation and enjoyment are the key motivators with socialising high on the agenda. Similarly, theatre audiences are seeking entertainment first and foremost. Interestingly, when focussing on the domestic tourism segment which is the primary market for Albury Wodonga and region, the main pursuit engaged in is social activities particularly; dining, drinking and other entertainment.

It would seem in theory that Albury Wodonga and region is well equipped to meet the demands of the theatre tourist market as the present tourism experience includes much of what the prospective theatre tourist market is seeking. Additionally, when the psychographic profiles are explored, Albury Wodonga and region is already attracting the appropriate segment that have been identified to more likely participate in theatre experiences namely; Socially Aware. This segment makes up a 21% of all tourists already visiting the area. However, turning theory into actual visitor numbers will require coordination and cooperation between the key players in the equation to develop strategies to more successfully immerse the theatre product into the overall tourism image of Albury Wodonga and region.

These strategies may include variations in programming of the theatre productions to fit in with traditional holiday times, or conversely outside these peak times. Also the style of productions may require some adjustment over the season to ensure the entertainment aspects that appear to be a high motivational factor with this market are delivered. Most successful theatre tourism relationships have been based around less highbrow productions. However, any alterations in the artistic direction of the theatre would need to be carefully balanced against long term cultural interests and the potential gains to the theatre and the broader community. Also it would be difficult for one product offering such as theatre in isolation to build a successful cultural tourism experience. Consequently, continual support for existing and development of additional mutually supportive cultural resources needs to be maintained by all aspects of the broader community including all levels of Government, the tourism sector and the wider community. One such approach
could be to stage a variety of culturally based events such as film or music festivals as theatre audiences indicate that they enjoy attending these events. This strategy would provide opportunities for cross promotion to the various groups. In short theatre needs to become a vital and intricate element of the total ‘brand architecture’ (Bennett 2005) of Albury Wodonga and region.

Additionally, members of the tourism sector will need to develop strong and supportive ongoing relationships with the theatre in order to meet the total bundle of motivations sought by the theatre tourist and also promote the opportunity to the prospective market. Further, to this theatre and tourism management in the region would be wise to explore promotion and communication strategies that focus on building strong ties with presently identified cultural and theatre user groups based within the regional catchment areas for Albury Wodonga. Specific strategies that the literature has indicated would be valuable include communication programs with strong word of mouth aspects and incorporating the use of relevant reference groups and opinion leaders within these special interest groups.

LIMITATIONS AND FUTURE RESEARCH

The paper is based on secondary date which although providing considerable insight does not deliver specific data and thus it would be imperative to undertake primary research to ascertain potential size, sustainability, attitudes and intentions of the potential market segment of regional theatre tourism. Also the paper is geographically based in regional Australia and thus the findings and recommendations although useful to other regional areas are not necessarily completely transferable.

REFERENCES


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Traditional Family Life: represent 20% of the total Australian population, and make up 34% of the interstate short break and holiday market. Comprised of retired-middle age Australia, family-focused lives, cautious of few things, and passive income earners. They tend to watch a large amount of television particularly news and current affairs. This segment have a higher than average propensity to visit; Art galleries/museums and historical places.

Visible Achievement: represent 18% of the Australian population and make up 46% of the interstate short breaks and holidays. They are success and career driven, look for recognition and status, aged 35 to 49 years, experience good family living and are focused on wealth creation. They are looking for tangible rewards and consumption tends to focus on travel, recreation and high quality homes and vehicles and holiday destinations that provide the very best of visible good living. This segment has a higher than average propensity to visit theatre and visit historical places. They are heavy readers of national newspapers and business and finance related magazines. They are frequently members of frequent flyers reward clubs.

Socially Aware: represents 13% of the Australian population and makes up 34% of the interstate short breaks and holidays. They are orientated towards social issues and often politically and community active, aged 35 to 49 years and are orientated to manage wealth and are insatiable information vacuum cleaners. They are very likely to visit Arts festivals/cultural events, theatre, musical performance/concerts, Art galleries/museums and historical places. They do not consume much television and are heavy readers of print media particularly newspapers such as the Australian, financial review and the Age.

Young Optimism: represents 12% of the Australian population and are usually young professionals, technocrats and students. Looking to get as much of life’s experiences, they believe they can have it all. Usually prevalent in inner or urban centres, have a strong international focus and are high consumers of arts such as popular music and cinema. Interested in media particularly specialist magazines, and average readers of newspapers.