

**AN 'INTEGRATED COMPARATIVE FRAMEWORK' FOR DATA  
COLLECTION FOR FESTIVALS IN SMALL REGIONAL AREAS:  
A CASE STUDY OF ECHUCA-MOAMA**

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## **Abstract**

Tourism managers in small regional areas often face difficulties through a lack of reliable data regarding tourists to their area. National collections, such as those conducted by the Bureau of Tourism Research in Australia, are typically collected on the basis of large regions. Unfortunately these regions may be too large for the data to be of value for managers in small areas.

We discussed this problem in a paper at the 2002 CAUTHE Conference (Frost and Foster 2002). In this paper we extend that discussion to the problems of organising and evaluating festivals and events in small regional areas. As is often argued in the literature, events and festivals are an attractive means for small areas to increase visitor numbers, lengthen stays and build a tourists profile. However, in planning such events, there is a strong need for reliable data, before, during and after the event. The most effective means of obtaining such data is through an Integrated Comparative Framework. Festival surveys should be designed after comparison with other collections and as part of an ongoing regional collection.

This paper presents a case study of a survey conducted during the Riverboats, Jazz, Food and Wine Festival at Echuca-Moama. By being a segment of an ongoing collection for the region, valuable data was collected which points to positive benefits for some tourism businesses, but negative effects for others.

# AN 'INTEGRATED COMPARATIVE FRAMEWORK' FOR DATA COLLECTION FOR FESTIVALS IN SMALL REGIONAL AREAS: A CASE STUDY OF ECHUCA-MOAMA

## INTRODUCTION

In recent years festivals and events have become a major part of tourism in many small regional areas. Local councils, tourism associations and interested individuals have combined to develop and promote festivals and events for a wide range of reasons. These include: to raise the profile of the area as a tourism destination, to increase tourism yield through increased numbers and longer stays, to diversify the tourist appeal of the region, to build local pride and community spirit and even simply to keep up with nearby competing areas (Tourism Victoria, 1997, 80-2).

In planning and conducting festivals and events, local organisers run into a major problem inherent in the nature of tourism in small regional areas. This is a lack of reliable and useful visitor data on which to base their decision-making.

In Australia visitor data are collected nationally through the International Visitor Survey and the National Visitor Survey conducted by the Bureau of Tourism Research (BTR). The results for these surveys are available for 84 regions. However, these data are only statistically reliable for large areas which attract large numbers of tourists and therefore large numbers of respondents in the surveys (Hunt and Prosser, 1998; Bureau of Tourism Research, 2001). This causes a problem for tourism operators and planners in small regional areas, as they often find that the data they wish to use is only available for large areas. As these larger regions may contain a variety of quite different small regions with differing tourism attributes and markets, these data may be of very limited use (this problem is discussed in more detail in Frost and Foster, 2002). A further difficulty is that the standard questions in the BTR surveys may not fit the needs or characteristics of particular small regional areas.

Festival and event organisers in small regional areas attempt to solve these problems by conducting their own research. Such small surveys have become a common feature of most festivals and events. However, there are four problems with this common approach. First, organisers in small areas are typically short of resources, they have limited funds to pay for research and often rely on volunteers or use small local market research consultants. This may affect the quality of the methodology and the results. Second, due to limited resources data collection is often confined to just the festival or event itself. Such surveys are essentially concerned only with evaluating the event. Who came? Were they satisfied or not? Preliminary research as part of the planning process is usually ignored. Third, such surveys may be specifically designed only for that event or festival. Organisers may be inefficiently 'reinventing the wheel'. Fourth, survey development often takes place in isolation from existing data collections, including both broader scale surveys (such as the International and National Visitor Surveys) and small surveys run for similar events and festivals in other small regional areas. Without such knowledge of other surveys, organisers may miss out on valuable information and neglect to ask important questions in their survey.

## A SHIFTING PARADIGM: A REVIEW OF RECENT LITERATURE

The running of festival surveys is commonplace and the results of such surveys feature heavily in the literature of festivals. Many surveys are designed to assess economic impacts, especially in order to satisfy funding bodies (for examples of such research see the special issue on economic impacts of *Festival management and event tourism*, 1994). A recent survey of the content of festival research papers has shown that economic and financial impacts are the most popular topic (Formica, 1998, 135). Indeed it has been argued that this focus on economic impacts has meant that little attention has been paid to other festival outcomes (Gitelson et al, 1995, 9).

Other factors which festival surveys have been used to investigate include: the characteristics of visitors, including demographics, socio-economics and motivations (see for example Uysal et al, 1993; Formica and

Uysal, 1996 and Krausse, 1998); attendance numbers (Denton and Furse, 1993; Brothers and Brantley, 1993) and the educational or interpretative impact (Gitelson et al, 1995).

In recent years there has been a shift in the focus of festival survey research. Founded in growing dissatisfaction, particularly amongst government funding bodies, with ad hoc fragmented research; the shift had been towards developing research frameworks and standardised approaches. Mainly emphasising economic impacts, these new instruments will enable funding bodies to enforce accountability and provide more reliable and credible survey results (Dwyer et al, 2000; Carlsen et al, 2000; Jackson et al, 2002).

## **AN INTEGRATED COMPARATIVE FRAMEWORK FOR DATA COLLECTION**

Standardised instruments (generally imposed by funding agencies) are likely to improve the quality and reliability of festival surveys. However, they still may be limited if they do not allow for comparison with data collected during non-festival periods.

For effective comparisons there is a need to develop statistical collections within what we term an **Integrated Comparative Framework**. This is a twofold strategy. First, organisers need to be aware of other statistical collections and how other organisers have approached similar issues. Organisers need to collect relevant examples, talk to others about their collection methodology and questions and think about the applicability of these other models to their situation. It may be that this development is initiated by local organisers or by a centralised funding agency. If the latter, this would lead to a standardised methodology, though care must be taken to ensure that some local flexibility is allowed.

Second, data collection from visitors to festivals and events should take place as an integrated part of an ongoing survey of visitors to the area. There are significant efficiencies in adapting an existing system rather than attempting to completely design new surveys in an ad hoc manner. While this is an ideal situation, it is recognised that this entails a much higher commitment of resources. However, such an ongoing survey has much broader benefits to tourism operators and planners in an area.

In order to demonstrate the advantages of such an approach, this paper presents a case study of a festival survey which was conducted at Echuca-Moama. This survey was conducted as a component of a larger ongoing visitor survey and offers valuable comparisons.

## **RIVERBOATS, JAZZ, WINE AND FOOD FESTIVAL, ECHUCA-MOAMA**

Echuca and Moama are two towns facing each other across the Murray River (the NSW-Victoria border), 200 kilometres north of Melbourne. Their combined population is about 12,000. They are an established tourist destination. In 1997 (the last year for which figures were collected) they attracted 309,000 hotel and motel guest nights and 668,000 caravan site nights (Australian Bureau of Statistics 1998A, Tables 7 & 11 and 1998B, Tables 7 & 10). In total they may receive nearly two million visitor nights plus a further 750,000 to one million day trips (Frost and Foster 2002).

Much of the tourist appeal of Echuca-Moama derives from its historic paddlesteamers (or riverboats) and port area. It is an excellent Australian example of an 'historic gem' and 'heritage waterfront', where rapid obsolescence in transport technology have preserved older areas from development (Ashworth and Tunbridge 2000, 87-91 & 155-8). Other attractions include large gaming venues (built when gaming was legal in NSW, but not in Victoria), recreation (boating, water-skiing, fishing, golf, bowls) and natural features (the Barmah Forest, Kyabram Wildlife Park).

One of the main tourism events organised by Echuca-Moama is the Riverboats, Jazz Food and Wine Festival which is run in February each year. This was developed as a means of attracting tourists in what was usually a fairly low period (being between the peaks of the summer school holidays and Easter). Festival events occur at various venues in and around the port area and river, including a

procession through the main street on Saturday afternoon and concerts at various venues on Friday and Saturday evening. Music and other entertainment is provided free of charge at restaurants and other attractions around the town. The highlight of the weekend is a day-long jazz concert on the banks of the Murray River on the Sunday. This is held in a fenced off area and patrons pay a fee to enter.

Visitor data collection has been a long-standing issue for Echuca-Moama. The two towns are in separate states and in separate regions for the BTR collections. The regions they are within are large and mainly agricultural. As tourism regions they lack unifying features and have problems with their brand images (Tourism Victoria 1998). To rectify these problems the Shire of Campaspe (based at Echuca) and the Echuca-Moama Tourist Association commissioned the Echuca-Moama Tourism Study (Frost and Foster 2002). This was developed as an *en route* or *intercept* survey of visitors to Echuca-Moama, rather than a *household* survey of all potential visitors, as in the BTR collections (Hurst 1994, 453-4).

A stage of the Echuca-Moama Tourism Study was conducted during the festival. Visitors were surveyed at various locations around the town and within the festival compound on the Sunday. The aim was to obtain information from a complete range of visitors to the town, not simply those who paid to attend the concert. The survey was a two-page questionnaire with a range of questions agreed to by a project steering committee composed of the Shire of Campaspe and the Echuca-Moama Tourist Association. In line with the Integrated Comparative Framework outlined above, the questions were essentially the same as those that had been asked in surveys conducted throughout other periods of the year. The questions were also designed to ensure that the results were compatible with the data collected for the larger region through the National and International Visitor Surveys and the 1995 Tourism Victoria Regional Travel and Tourism Survey. For example, the question on age permitted aggregation that is compatible with the IVS and NVS. A question on activities undertaken while on holidays was based on one in the Victorian Regional Travel and Tourism Survey (Tourism Victoria 1996).

## RESULTS

The survey collected usable responses from 494 visitors, 65.9% of whom were there specifically for the festival. The data provided an opportunity to draw some interesting comparisons between visitors to the festival and those who visited Echuca-Moama in other periods of the year. For the purpose of this paper, a comparison is made between the festival results (those who indicated that they visited Echuca-Moama specifically for the festival) and those obtained from surveys held at other times in the year. The latter comprised 426 intercept surveys conducted on various weekends throughout the year (labelled ‘Non-School Holiday Period’ in the following tables) and 544 surveys conducted during the School Holiday period (labelled ‘School Holiday Period’).

**Figure 1: Type of Group**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Single	7.1	5.1	8.8
Couple Only	46.9	38.5	36.1
Single/Couple with children	10.4	26.1	29.6
Larger Family Group	19.0	15.0	11.4
Other Larger Group	16.6	15.3	14.0

Respondents were asked to identify the type of group which they were visiting with (Figure 1). As can be seen, those attending the festival were more likely to be there as a couple or larger family group than for visitors at other times of the year. There was a much smaller proportion of people who were attending the festival with children.

**Figure 2: Length of Stay**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Day Trip	39.7	56.5	40.7
1 night	9.5	15.2	19.7
2-3 nights	46.9	20.3	28.8
4-5 nights	2.4	3.6	5.0
6-7 nights	1.6	3.0	4.2
8+ nights	-	1.0	1.6

The length of stay of respondents in the three surveys is shown in Figure 2. Of particular interest in this data set is that the festival was attracting people who stayed for the whole weekend (2-3 nights) rather than simply one night. However, the proportion staying longer was far smaller than in the other surveys.

**Figure 3: Age Group**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
16-19	2.9	2.0	2.1
20-24	1.9	3.8	3.0
25-29	7.6	9.0	7.8
30-34	10.0	13.9	11.5
35-39	13.7	16.5	14.5
40-44	12.3	11.8	15.0
45-49	10.4	8.7	10.5
50-54	18.0	11.0	8.6
55-59	6.6	6.6	6.4
60-64	9.5	8.4	6.0
65+	7.1	8.4	14.7

In terms of age group (Figure 3), the festival was clearly attracting a larger proportion in the 50-54 year age group than generally visit the area. As an attractor to the area, the festival was less important for to the 20-34 year olds.

**Figure 4: How Found Out About Echuca-Moama**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Brochure or Booklet	12.8	5.0	2.7
Jigsaw (Tourism Victoria) campaign	2.4	2.7	1.3
Friends / Relatives in Echuca	17.6	7.0	10.2
Friends / Relatives Elsewhere	15.2	9.4	15.4
TV Feature	2.4	1.3	1.8
TV Advertisement	12.0	7.3	1.1
Radio	10.4	0.3	0.4
Newspaper	11.2	2.7	2.0
Internet	-	1.9	0.9
Other	24.8	61.7	64.3

Respondents were asked to explain how they found out about either the festival or the area. The influence of relatives/friends both in Echuca and elsewhere is shown in Figure 4. More importantly, however, was the value of television, radio and newspaper advertising as sources of information for those attending the festival. This played a much less important role than amongst visitors at other times of the year. The ‘other’ category includes responses such as ‘been before’. Again there was a significant difference between those who attended the festival and those at other times.

The accommodation used by those attending the festival is particularly interesting (see Figure 5). A smaller percentage used motels or hotels than was usually the case, and far more stayed with friends and relatives.

**Figure 5: Accommodation Used**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Motel/Hotel	46.1	58.2	50.1
Backpacker Hostel	-	5.0	1.8
Visiting Friends and Relatives	19.7	7.8	9.6
Camping Ground/Caravan Park	22.4	22.7	30.5
Nearby Town	6.6	-	-
Other (B&B; Cabin; etc)	5.3	6.4	8.0

When asked how they chose their accommodation, a larger proportion than normal relied on friends and relatives. However, the main difference was in the ‘other’ category, which mainly includes those who have either used the accommodation before, known about it for a long time, or chose the venue randomly. The latter information could be used to encourage accommodation operators to make sure that they had appropriate signage and ‘specials’ displayed to attract those who had not pre-booked.

**Figure 6: How Chose Accommodation**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Brochure or Booklet	12.9	14.7	5.9
Friends/Relatives in Echuca	14.5	9.8	10.5
Friends/Relatives Elsewhere	14.5	9.8	10.8
Visitor Information Centre	4.8	7.7	8.0
Travel Agent	3.2	6.3	4.4
Accommodation Guide	1.6	11.9	16.9
Internet	-	4.2	2.8
Other	48.4	35.7	40.7

All respondents were asked to indicate whether they had engaged in a number of activities during their trip to Echuca-Moama. For each activity, the percentage who participated is shown in Figure 7. When the data is compared for those attending the festival and those who visited at other times of the year, a not unexpected pattern emerges. A much larger percentage engaged in such things as dining at a good restaurant, visiting friends and relatives, visiting a winery and visiting a craft centre or gallery. On the other hand fewer festival visitors visited a gaming venue, a park/garden or an educational centre or went on a guided tour.

**Figure 7: Activities Undertaken on This Trip**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Riding a Paddle Steamer	36.0	38.6	52.4
Dining at a Good Restaurant	65.0	41.1	32.7
Visiting Friends/Relatives	27.0	14.9	17.9
Shopping (for non-necessities)	40.0	33.7	39.4
Bushwalking	3.0	5.1	22.1
Visiting a National Park	7.0	5.7	26.6
Visiting Gallery/Craft Centre	30.0	16.3	35.8
Visiting a Museum	24.0	31.1	71.7
Visiting Aboriginal Centre	3.0	3.1	6.3
Visiting Park/Garden	7.0	12.9	20.2
Visiting Wildlife Park	2.0	13.7	22.1
Going on a Guided Tour	1.0	7.4	6.2
Visiting a Winery	30.0	13.4	14.7
Visiting a Gaming Venue	11.0	18.6	16.3
Fishing	4.0	1.7	9.2
Boating or Canoeing	6.0	1.4	5.7
Water Skiing	5.0	0.9	0.3
Playing Sport	2.0	6.3	6.2
Driving for Sightseeing	32.0	41.7	36.6
Visiting an Educational Centre	5.0	28.3	25.0

Finally, Figure 8 shows the origin of those visiting Echuca-Moama. The festival attracted a higher percentage of visitors from Melbourne and other parts of Victoria than was generally the case. This information would prove to be very valuable when a marketing strategy is being determined for future years of the festival.

**Figure 8: Home Location of Respondents**

	Festival (%)	Non-School Holiday Period (%)	School Holiday Period (%)
Surrounding Areas	12.0	23.4	4.6
Shepparton	4.0	9.3	8.8
Bendigo	6.0	6.5	4.6
Melbourne	33.0	25.1	26.3
Other Victoria	30.0	21.2	31.3
New South Wales (except local)	9.0	5.6	10.4
Other States	1.9	6.5	9.1
International	3.0	2.3	4.2

## ANALYSIS

How data is analysed is often not straightforward. In comparing the data for the festival with the two other periods, two quite different interpretations were developed. Their relative acceptability differs depending on the perspective of the user, for example a restaurant operator might favour one over the other. While the choice of the right interpretation is subjective, it is important to understand that both interpretations came because the data collected at the festival was within the Integrated Comparative Framework. They arose because comparisons could be made between tourists visiting at the time of the festival and tourists visiting

at other times (and without the comparative data it is likely only one of these interpretations would have been developed).

The first interpretation is that the festival brought a different type of person to Echuca-Moama. There were higher levels of couples and large family groups. They were significantly older than usual (one might assume that many of the couples had older children who had either left home or could be safely left at home). They came for the weekend, there were less day-trippers than usual, but also less long stayers. They were far more influenced by television, radio and newspapers and far less inclined to say they knew about Echuca-Moama because they had been before. Friends and relatives were important in drawing them in and accommodating them. They recorded high levels of eating at restaurants, shopping, and of visiting galleries, craft centres or wineries.

In this interpretation, the festival can be seen as a great success. It attracted a different type of tourist, the temptation amongst tourism operators in Echuca-Moama was to characterise them as being from the highly desirable *socially aware* category (Tourism Victoria 1997, 119). The festival raised the incidence of overnight stays, again into a highly desirable category of *short breaks*. The activities they engaged in were upmarket and high status, another pointer of their *socially aware* status (our survey does not allow such psychographic segmentation, but these were the type of conclusions made by local tourism operators). Most importantly there are indications of higher yields from the festival visitors, an excellent injection of income into the local economy. The survey indicates high levels of dining at local restaurants, shopping, and visiting galleries, craft centres and wineries, were they presumably spent their money in those businesses.

The second interpretation is that the success of the festival may have been limited because the new tourists were highly focussed in some areas and did not have an even impact across the full range of tourism operations in Echuca-Moama. The rates of usage of all the commercial forms of accommodation fell, instead the rate of staying with friends and relatives rose significantly. The use of the Visitor Information Centre to book accommodation fell. The incidence of riding a paddle steamer fell, even though this was a *Riverboats* festival. Activities such as bushwalking, visiting a museum, park or garden, a wildlife park, a gaming venue and educational centres, playing sport and engaging in guided tours all fell significantly.

The festival appears to have focussed tourists into the historic port area of Echuca. This was adjacent to the jazz concert venue. It contains a wide range of tourism operations, including restaurants, shops, galleries, craft shops and winery outlets. Further away from the port area the level of visitation seems to have fallen away sharply. Across the river in Moama, there a range of modern motels, gaming venues and golf courses, which would have been affected by lesser patronage. The wildlife park at Kyabram (50 kilometres away), the Torrumbarry Weir Visitors Centre (35 kilometres), the Golden Cow Dairy Centre at Tongala (30 kilometres) and the Barmah State Forest – which hosts a number of tours (30 kilometres) all had significantly less percentages of visitors.

It may be that there was an *opportunity cost* factor operating amongst tourists. Having decided to visit the festival, to spend their time and money listening to jazz, drinking wine and eating at restaurants, they were disinclined to travel away from the festival core to take in other experiences. It may also be a marketing issue, that they were focussed on a certain geographical area and certain activities and were not aware of other tourist experiences on offer. If so, the challenge for the festival operators is to extend its benefits across a wider geographic area. There are clear indications of a displacement effect. Usually, displacement resulting from tourism and festivals is viewed as only affecting certain social and ethnic groups (see for example, Ashworth, 1998; Frost, 2001 and Krausse, 1998). In this case there appears to have been a business displacement.

As stated above, whether the festival was a success or not depends on one's perspective. For a restaurant operator next to the port area it would have seemed a very busy event. In contrast for an attraction or tour operator out of town, it may have seemed to be a very quiet weekend.

## CONCLUSION

The recent growth in the number and range of festivals has been accompanied by a consequent greater interest in surveys of festival visitors. The purposes of such surveys include: to estimate attendances, gather data on demographic and other characteristics for marketing purposes, to provide information to stakeholders and funding bodies on the conduct and impact of the festival and to assess the economic impact on the local area. As a result there has been a proliferation of small surveys of festival attendees. This trend is likely to continue, as funding agencies in particular, increasingly demand statistics to monitor and evaluate festivals.

However, to gain the greatest value from resources spent on conducting surveys and to ensure greater reliability, funding agencies have begun to explore standardised collection frameworks. In this paper we have argued that there is scope for further improvement through the adoption of an **Integrated Comparative Framework** for collecting data on festival visitors. Under such a system, festival surveys should both operate as part of an ongoing regional data collection and be comparable to collections in other regions. We urge funding agencies to consider our approach in developing standardised frameworks.

We have illustrated our concept through a case study of the Riverboats, Jazz, Food and Wine Festival at Echuca-Moama. Visitors to this festival were surveyed as part of the ongoing Echuca-Moama Tourism Study. The questions they were asked were based on and comparable to other major collections by the Bureau of Tourism Research and Tourism Victoria.

By being part of a larger survey, it was possible to compare the results for festival goers with two other cohorts – those who came in school holidays and those who came at other times. There were significant differences between the responses from those who came for the festival and those from the other groups. The contrast between the groups indicates the value of integrating the festival survey into the broader study.

However, the causes of the differences are open to differing interpretation. One scenario is that the festival was greatly successful in attracting a different type of tourist, one who seemingly spent more on restaurants, wine and shopping. The second scenario, while agreeing that there was a different type of tourist, more likely to visit restaurants and so on, suggests that these tourists were mainly concentrated near the festival venue and in businesses related to the festival themes. Further away from this core, other businesses were seemingly badly affected by lower than normal levels of visitation.

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