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## UNDERSTANDING SCHOOL EXCURSION PLANNING AND CONSTRAINTS: AN AUSTRALIAN CASE STUDY

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**Abstract:** According to Ritchie, Carr, and Cooper, school excursion tourism is a relatively underresearched and poorly understood segment of the tourism industry, particularly with regard to its size and specific nature. Yet both domestic and international school excursions provide an important market for attractions, tour operators, and accommodation providers. Although school excursions are not a major economic force for attractions they can provide positive word of mouth and encourage future visitation for both students and parents, and can also support off-season visitation. Cooper notes the need to understand the school excursion market, including their motivations, needs, constraints, and travel behavior. This article begins by outlining the potential of school excursions before focusing on domestic school excursions through discussing a study conducted on the school excursion market in Australia. A total of 807 schools nationwide were surveyed in 1998–99 to examine their school excursion behavior, including their motivations, constraints, and perceptions of Canberra (the National Capital of Australia). Forty-six percent of schools had a dedicated school excursion planner, and while the major motives for school excursions were educational, they were closely followed by cost-effective destinations, a variety of destination attractions, and the ability of attractions to cater specifically to school groups. A total of 74% of schools note that funding is an influencing factor for school excursion planning and note specific strategies that could attract future school visitation to destinations. The results indicate that understanding the school excursion market is important in formulating strategies to attract this market and to provide quality experiences for students and teachers. The findings may be of interest to other destinations seeking to attract school excursions, including national capital cities and destinations with educational attractions.

**Key words:** Tourism; Excursion; School; Travel; Behavior

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Despite the growth of educational forms of tourism (see Ritchie, 2003), very little attention or focus

has been provided on schools tourism and in particular school trips or excursions. Furthermore, there

has been a lack of research into the constraints faced by schools in organizing and planning school excursions as well as their motivations for undertaking such trips. Understanding these constraints alongside their travel behavior and motivations is vital for destinations and attractions that view school excursions as an important target market.

Educational visits have long been considered an integral part of the school life (Cooper & Latham, 1989). However, little attention has been paid in recent years to their role as an important source of visitors for attractions and destinations. The view that school visits have economic value for a destination's economy has been overlooked in the last decade. A lack of research can inhibit the growth and management of this sector or the development of an integrated strategy for attractions and destinations that may wish to expand this market. Research is therefore critical to formulate a marketing strategy to increase and manage levels of visitation and satisfaction for school groups. Similarly, more information is required to ascertain those factors that constrain or act as a barrier to demand for school excursions.

This article suggests that marketers (who need to understand the nature of the domestic school excursion market) should treat this neglected segment similarly to other segments and understand their constraints and issues faced when schools are planning and organizing excursions. This article considers these aspects through a discussion of Australia and a nationwide research project undertaken to examine the nature of, and barriers to, domestic school excursions. Although this article is an Australian-based research project, the results and issues will be of interest to other countries (including their national capitals) that have attractions of educational and scientific merit and who believe that school groups are important for their destinations and attractions.

The article continues with a discussion of educational tourism and schools tourism before outlining the nature of school excursions and the barriers and constraints facing such excursions. The article then outlines the details of the nationwide study conducted in Australia, and presents the results of the research before concluding and considering the implications for other destinations and future research. The research findings and implications will be use-

ful for marketers, education officers, and planners at both the destination and attraction level. Furthermore, a number of research question issues are presented that may be of interest to researchers involved in school excursions and educational forms of tourism.

#### Educational Tourism and Schools Tourism

Although many educational tourist typologies exist, Ritchie (2003) has presented several main types that differentiate themselves depending on their motivations and characteristics into:

- general travel for education (or "edu-tourism") and adult or seniors' educational tourism, where some form of education or learning are an important (and often motivating) part of the tourist experience; and
- university/college students and schools tourism (language schools, school excursions, and exchange programs), whereby tourist experiences may be secondary to the educational aspect or intentions.

Moreover, school excursions or trips, according to Ritchie, Carr, and Cooper (2003), encompass domestic and international trips, and student exchanges with school trips divided into two categories. First, there are curriculum-based ones that are directly linked to the lessons taught in the classroom and represent either an integral part or extension of the formal learning experience. The other type of field trip may be defined as extracurricular excursions. These are designed outside the constraints of curriculum demands and are not linked directly to a particular class or discipline (Fig. 1).

The type of school excursion is particularly important and may influence the planning and decisions to undertake a school excursion or trip by teachers, parents, and pupils. Day trips are perhaps easier to organize, manage, and fund in comparison to overnight stays and longer duration trips. Differences may also exist related to whether the trip is curricula or noncurricula based, which may influence the location and timing of travel. Furthermore, the location of the destination (within the same state or region, country, or continent) also dictates the complexity of planning for school trips.

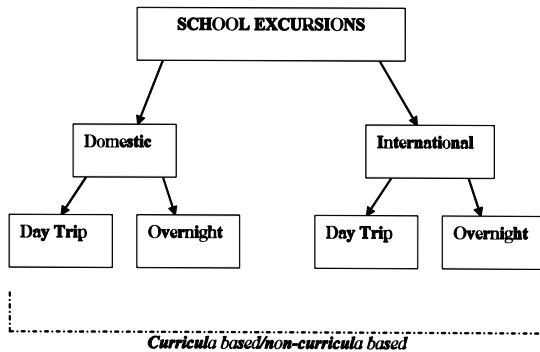


Figure 1. Types of school excursions.

### The Nature and Size of the Schools Market

School excursions are not a major money generator for attractions and may never be “high yield, big business”; however, they do increase the profile of attractions to a group of potential visitors and their parents. This article contends that marketing to schools is as important as any other market segment for two major reasons. First of all, young people’s attitudes towards a destination and its attractions, both public and private, are likely to be influenced by the experience they have at that time of their lives. As Cooper and Latham (1989) note, school visits are a good investment for the future if there is favorable word of mouth from students. Secondly, from a tourism visitation perspective, school groups help to bolster off-peak attendances at attractions, and can increase revenue from shops and catering outlets even when a discounted admission price is given (Cooper & Latham, 1985, 1988).

Perhaps an even more compelling reason for a review of marketing to this segment is that cultural attractions such as museums, art galleries, and nature parks have become valued as educational and community resources and have a role to play in educating children about scientific and citizenship issues. However, as Cooper (1999, 2003) notes, despite official statistics and reports in Europe ignoring school trips, the market is a significant one with an estimated 70 million pupils and students in Europe alone making an estimated 100 million day trip visits and 15–20 million overnight trips during 1998 (Table 1).

Table 1

Number of Pupils in Selected European Countries

Country	Number of Primary Pupils (000s)	Number of Secondary Pupils (000s)
Belgium	711.5	765.7
Denmark	326.6	443.8
Germany	3524.2	7796.3
Greece	723.7	851.3
Spain	2477.9	4734.4
France	4011.0	5737.4
Ireland	398.7	362.2
Italy	2863.0	4715.6
Netherlands	1056.8	1352.5
Austria	381.6	778.0
Portugal	910.7	778.5
Finland	390.9	459.1
Sweden	600.4	607.2
UK	5143.2	4537.0
Iceland	24.7	30.9
Norway	309.9	380.3

Source: European marketing data and statistics (1998) in Cooper (1999).

Cooper and Latham (1989) estimated that in England this market undertook approximately 12 million domestic visits, which is equivalent to 5% of the entire sightseeing market, and generated £8 million annually in the late 1980s. Within Australia the number of children visiting the national capital on school trips was estimated at 108,000 in 1998, contributing AU\$10.2 million to the ACT economy (Coughlan, Ritchie, Tsang, & Wells, 1999).

Despite the potential size of this market, a major assumption of marketers, education officers, and planners is that the school market is generic or homogeneous when clearly the only commonality is that the market originates in schools. The schools market is diverse in origin, age, purpose of visit, pattern of visit, length of stay, needs, and requirements for a satisfying visit to both destination and attractions. Indeed, this market is becoming more sophisticated with demands for high standards in access, accommodation, educational services, interpretive materials, and interactive educational experiences while on tour.

A change of scene or a trip may make sense for many teachers in that the study of real objects and activities outside the classroom can provide a fresh stimulus to blackboard-weary children, but this is no guarantee that the visit will be a success. Catering for

various ages, attitudes, educational material, interactive learning experiences, well-qualified staff experiences, and entertainment is a challenge for all sectors of the tourism industry engaged in school visits. As Cooper (1999) rightly notes, there is a need to understand the school excursion market, including their motivations, needs, and constraints. Future development of the experience means identifying the product more closely with the needs of this market and especially understanding the constraints or barriers to school excursion travel, and how those may be countered through pricing or distribution initiatives.

*Constraints or Barriers to School Excursion Travel*

From a tourism marketing perspective, those people who take part in an activity represent existing demand while those individuals who express an interest but do not participate because of particular constraints represent potential or latent demand. The value of understanding those factors that act as a barrier or impediment between the preference for an activity and participation in it (Crawford & Godbey, 1987) lies in awareness, which allows the marketer to convert that latent demand into existing demand. Constraints to demand for travel are well documented in the tourism economic (Bull, 1995) and leisure literature (Godbey, 1990; Goodale, 1992; Jackson & Scott, 1999).

Research into constraint theory in the leisure literature has moved from the pragmatic and generation of variable lists or “laundry lists” of a few barrier items (Jackson & Scott, 1999, p. 11) to a more conceptual approach. Two major themes have emerged in research: activity-specific participation and the impediments or constraints associated facing particular segments of the population. In the case of the former, studies have centered on the barriers for nonparticipation in specific activities such as sport and recreation (Backman & Crompton, 1989). Further empirical research has focused on more conceptual approaches highlighting common dimensions, such as time commitments, costs, facilities and opportunities, skills and abilities, transportation and access, and various models describing the interaction of individuals and groups to explain constraints (Hinch, Jackson, & Hickey, 1998; Jackson & Scott, 1999).

The role of the marketer in converting that latent demand into effective demand is to overcome those barriers that research will uncover. In this situation, both economic and leisure constraint theory can be useful in grouping variables that are, broadly, economic (costs), spatial (time commitments), personal/psychological (lack of motivation/interest, attitude), institutional in the generating region (timetable, curriculum) and the destination region (appropriate accommodation, the variety of attractions, access to medical facilities), which are outlined in Figure 2.

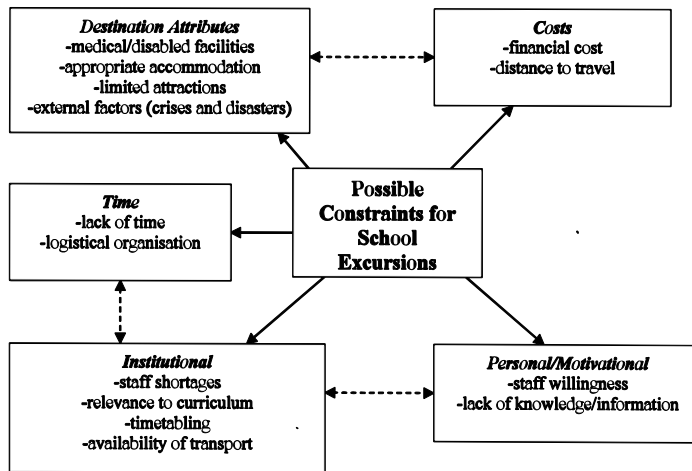


Figure 2. Possible constraints for school excursions.

However, external factors, such as crises and disasters at a destination, may also inhibit the attractiveness of a destination. Some of these constraints may be interrelated such as institutional and personal/motivational barriers. Due to a staff shortage at a school, teachers may not have a strong willingness to commit to planning school trips. Similarly, timetabling constraints can have a large impact on the time available for planning and undertaking school excursions. Ultimately, the challenge remains to align the marketing mix more closely with the concerns that the latent market demonstrates. In most cases, the results will have implications for the further development of the product, its pricing, and distribution.

#### Canberra (the National Capital) as a Schools Destination

Canberra is an approximately 3-hour drive south of Sydney and a 7.5-hour drive from Melbourne and sits in the Australian Capital Territory (ACT) within the state of New South Wales. Canberra is a high-profile destination for the schools market and is a major market segment for the ACT as it is the national capital of Australia and has many attractions of scientific and educational merit. In 1998 the size of the schools market to Canberra was anecdotally estimated to be between 80,000 and 100,000 student visits. The destination marketer (Australian Capital Tourism Corporation, the former Canberra Tourism and Events Corporation) indicated that the average student spends \$42 daily and 30% of venues offer some education program, while 12% of accommodation establishments take students (Inaugural Conference of the Schools Marketing Committee, 1997).

The national capital enjoys several major strengths in providing an educational tourism experience and the supporting infrastructure. A significant feature is the concentration in a relatively close area of major national attractions. Compared with many other capital cities, access to attractions is very favorable with travel time being short between the various attractions. Indeed, a good deal can be covered in a short time. Canberra is a unique destination because of the national significance of the attractions and the overall image of the federal capital as the repository of cultural and political icons. Many na-

tional attractions have allocated significant resources to educational programs, which are curriculum related and devised to cater for different groups. Educational officers, key personnel in many of the national attractions, have strong educational backgrounds, although may not necessarily be looking at the total schools destination experience. In contrast, the major weakness of Canberra as a school's destination lies less with its image (normally a major constraint linked to other markets) but more with the capacity of its attractions and the complacency of their managers.

However, because the trip to the national capital is seen by many teachers as an annual or biennial visit, the experience is inclined to become bland if not tedious. The challenge, then, rests with a group of representatives from the Schools Educational Tourism Committee (SETC) to be more aware of their market needs and vary the exhibitions and visits. However, it is an issue of peaks and troughs, which means that school groups cannot all be accommodated at those times of the year when Federal Parliament sits, as 60% of students book for the known parliamentary dates (Inaugural Conference of the Schools Marketing Committee, 1997). Most national attractions would prefer visitor distribution to be more even and to have more time given to groups when they do visit (Inaugural Conference of the Schools Marketing Committee, 1997). Such problems can of course present opportunities and solutions in terms of target marketing and product development for those markets, which can be attracted at more advantageous times to the attractions.

However, even though this segment needs marketing consideration and resources, the plan in 1998 was to dramatically increase the size of this market visiting the national capital in the year 2001. The centenary of the birth of federation represented a significant occasion for Australian schools and their pupils. Although states held their own particular celebrations and emphasized their role in the beginnings of federation, the national capital is the symbol of continuity of the present constitutional arrangement and therefore was worthy of greater focus from schoolteachers and pupils. It was the aim of the SETC to oversee an increase the number of students to double the number of students in 1998 to 200,001 in the Year of Federation (2001).

Recognition that both time and costs are major constraints to the schools market has already materialized in the form of the Citizenship Visits Program. This program provides a subsidy to students who visit Canberra as part of an organized school visit. This subsidy is payable to students attending schools located more than 1000 km by road from Canberra. A recent reduction in this subsidy by 15% accounted for the drop in the rate of growth in the number of students benefiting from the Program (Department of the House of Representatives, 1998).

The purpose of this research program was to define and examine the profile of the schools market and its significance to the local economy; and to examine the barriers and other constraints to expanding that market. Research was undertaken with schools currently visiting the destination, accommodation and attraction operators, and schools nationwide (a latent demand study). It is the latent demand study that this article will discuss in detail. However, it should be noted that since this research was undertaken, further funding was gained by SETC to increase schools marketing for the 2001 Centenary of Federation (under the National Capital Education Project), and an evaluation by Cambourne and Falks (2003) discovered that 127,956 interstate school children visited the national capital in 2001 (short of their target of 200,001 students), but this represented an increase of 11.4% in the total volume of the market from the study conducted in 1999 by Coughlan et al. (1999), with 10% visiting for the first time.

### Methodology

Little coordinated research has taken place within Australia or indeed worldwide pertaining to the topic of school excursion planning and constraints. This study was interested in the factors that schools considered important in their selection process for educational excursions, their past travel behavior, and perceived barriers to excursions as well as the nature of their educational establishment.

The study utilized a number of component surveys directed at various stakeholders, although only the broader latent market for school excursions is discussed in this article. Questions were asked in this study concerning the sociodemographics of

schools (to examine differences between schools), their motivations for school excursions, and questions concerning barriers or constraints to visitation and potential initiatives to encourage visitation. These questions were derived from an analysis of previous literature and also through interviews with the SETC, which includes education officers, attraction marketers, and the local tourism authority for the national capital.

The majority of questions were closed questions based on respondents' agreement to a series of statements on a 5-point Likert scale, as the intention was to measure attitudes towards school excursions and barriers/constraints to school excursion travel based on the constraints outlined in Figure 2. Twenty-two motivations on a 5-point scale from "not at all important" to "extremely important" were derived and used in the survey instrument.

The latent market analysis was conducted in the form of a self-completion mail questionnaire to 4000 schools throughout Australia that was mailed out in November 1998. Schools were selected randomly from a complete list of Australian schools. Schools within the ACT were excluded as these schools were traveling to the national capital for schools excursions presently and the SETC believed that the region has more to benefit from attracting schools from a wider region than solely the ACT. List Bank, a commercial mailing list supplier in Australia, supplied the randomly generated list.

Of the initial distribution, 807 surveys were returned completed and useable, providing a response rate of 20.2%. Although this response rate is low, it is in line with Ryan (1995), who believes that a response rate of between 15% and 20% is normal for this type of survey methodology, which did not include a follow-up due to funding constraints. Based on 807 usable responses the results are confident to  $\pm 4\%$  at the 95% level of certainty based on the target population. Data were entered into SPSS version 10 and data tables created. ANOVA and independent *t*-tests were carried out to examine responses to the Likert questions (such as motivations and perceptions) with demographic variables (such as school type and location) to gain further insights on school perceptions and barriers. Statistical tests were carried out to a significant level of 95% unless otherwise stated below.

## Results

This section first presents a profile of the schools that responded to the survey by exploring their demographics and school excursion behavior, before discussing their motivations for school excursions, and, finally, their perceived barriers and constraints. Combined, these data provide useful insights for destination and attraction marketers concerning the domestic school excursion market in Australia, and may also provide some insights for their counterparts in other capital cities and educational attractions and destinations in other countries. In particular, the results provide insights into the latent demand for school excursions, an area of research that has not been undertaken previously but is vital for making marketing and product development decisions for the educational tourism industry.

### Profile

Overall, the latent market survey was relatively representative (Table 2). Most significantly, there is an overrepresentation of schools from New South Wales and an underrepresentation of schools from Victoria. However, the sample is representative from both the perspective of whether the school was a primary or secondary school and additionally whether the school was a government/public or non-government/private school (compared with Federal government statistics from DEETYA).

Table 2  
Latent Sample Characteristics

	Latent Sample (%)	DEETYA 1998 (%)
<b>State</b>		
New South Wales	55	32
Queensland	20	18
Victoria	10	24
Western Australia	7	11
South Australia	5	9
Tasmania	2	3
Northern Territory	1	2
<b>Type of school</b>		
Primary	70	72
Secondary	26	17
Combined	4	11
Government	67	73
Nongovernment and other	33	27

On the whole, 94% of schools indicated that they have been involved in or were currently planning to undertake overnight excursions. On average, four overnight excursions have been planned or occurred during 1998. However, private schools (5.9 excursions) and secondary schools (7.7) had a higher average number of overnight excursions than public schools (3.5) and primary schools (2.3). Of the school overnight excursions undertaken or planned during the 1998 calendar year, the average length of stay was 3.09 nights, with public and primary schools staying longer than private and secondary schools. The average group sizes of participants were 48 people with private and secondary schools containing more participants than public and primary schools.

The average distance traveled per trip was found to be 454 km; however, in comparison, public and primary schools traveled further than private and secondary schools. Furthermore, on average, the maximum distance schools would be prepared to travel for an overnight school excursion appeared to be 560 km with public schools (543 km) and secondary schools (642 km) receiving a higher mean score than private schools (508 km) and primary schools (472 km). The reason for this is probably due to a combination of considerations, such as the ability of older children to withstand longer bus trips with less frequent stops.

An average of 46% of schools had a dedicated staff member who takes on the role as the excursion planner for their school. Specifically, 45% of primary schools indicated they had a dedicated staff for planning excursions, while 27% of secondary schools had a planner compared with 40% of both public and private schools. Limited differences between public and private schools exist, with primary schools tending to have a higher rate of a dedicated staff dealing with excursions than that of secondary schools.

### Motivations of the Latent Market

Attributes contributing to the motivations of school excursions are highlighted in Table 3. Twenty-two motivational attributes were listed and rated by the respondents using a 5-point Likert scale.

The scale ranged from "not at all important" to "very important." Evidently, the top five attributes



Table 3  
School Excursion Motivations

Motivation	Mean Score	Not at all				Very Important (%)
		Important (%)	Unimportant (%)	Neutral (%)	Important (%)	
Attractions with educational merit	4.7	0	0	2	31	68
Cost-effective attractions	4.6	0	0	3	32	65
Relevance to studies	4.6	0	0	3	32	64
Ability to cater for school groups	4.6	0	1	4	33	63
Variety of attractions/activities	4.4	1	1	5	44	50
For new experiences	4.4	1	1	4	46	48
Student bonding	4.3	1	2	10	47	41
Access to destination	4.3	0	1	7	50	41
Historic and cultural attractions	4.2	1	1	10	60	29
To learn in a new environment	4.2	1	1	10	49	39
Accommodation	4.2	1	1	10	54	34
Attractions of national significance	4.1	0	2	16	50	32
Attractions with citizenship merit	3.9	2	2	23	54	19
Natural attractions	3.9	1	2	22	56	20
Recreational opportunities	3.9	1	5	22	52	20
Attractions with scientific merit	3.8	1	3	27	54	15
For practical reasons	3.7	3	4	30	44	19
Weather	3.5	3	8	34	43	12
Breaking/changing of school routine	3.4	5	12	30	38	15
Scenery/scenic beauty	3.4	2	9	39	41	8
Entertainment	3.4	3	10	41	40	6
As a reward for children	3.1	10	17	39	24	9

that appear to motivate undertaking school excursions include *attractions with educational merit* (68% “very important”), *cost-effective attractions* (65%), *relevance to studies* (64%), *ability to cater for school groups* (63%), and a *variety of attractions and activities* (50%) a destination has to offer. On the contrary, attributes such as *entertainment* (6% “very important”) and a *reward for children* (9%) were perceived as less important, therefore being ranked at the lower end of the scale. The motivation to *learn in a new environment* has also been rated of importance because students are more likely perceived to be more receptive to certain topics presented in places related to the educational topic rather than in the classroom environment. The variable *attractions with educational merit* rated the highest with 99% indicating that this motivation had some importance to respondents. Virtually all of the motivations listed had minimal levels of unimportance. Additionally, none of the motivations listed in the survey received a mean score below 3.1.

It is important to note that the schools market is not a generic one. Different motivations were important for different types of schools and schools from different regions. Most significantly, primary,

secondary and combined schools differed on a number of important motivations after an ANOVA test was conducted (see Table 4 for significant differences).

Significant differences were found related to many of the types of school through the use of an ANOVA statistical test. A *variety of attractions and activities*, *attractions with national significance*, and *accommodation* were significantly different between all three groups, with primary schools placing more importance on these factors. Secondary schools placed less emphasis on *student bonding* and *for new experiences* compared with primary or combined schools. Furthermore, *scenery/scenic beauty* and *weather* scores were statistically different between primary and combined schools, but were not between secondary and the other category of schools. Primary schools seemed to hold a variety of motivational factors as more important than other schools, perhaps indicating the school excursion experience is viewed more broadly than just an educational experience but as an experience for student bonding and personal development for students.

However, when the motivations are viewed from the perspective of government and nongovernment

Table 4  
Primary, Secondary, and Combined Schools Versus School Excursion Motivations

Motivation	Overall Mean Score	Primary School Mean Score	Secondary School Mean Score	Combined School Mean Score	F	df	Sig.
Variety of attractions and activities	4.4	<b>4.49</b>	4.27 <sup>3</sup>	4.32 <sup>2</sup>	7.298	769	0.001
Attractions of national significance	4.1	<b>4.18</b>	3.94 <sup>3</sup>	3.96 <sup>2</sup>	6.814	584	0.001
Student bonding	4.3	4.30 <sup>3</sup>	4.05	4.34 <sup>1</sup>	0.483	770	0.001
For new experiences	4.4	4.45 <sup>3</sup>	4.24	4.50 <sup>1</sup>	6.457	771	0.002
Scenery/scenic beauty	3.4	3.51 <sup>2</sup>	3.37 <sup>1,3</sup>	3.32 <sup>2</sup>	3.441	771	0.033
Accommodation	4.2	<b>4.26</b>	4.08 <sup>3</sup>	4.11 <sup>2</sup>	4.658	777	0.010
Weather	3.5	3.61 <sup>2</sup>	3.45 <sup>1,3</sup>	3.41 <sup>1</sup>	3.330	772	0.036

Numbers in bold signify means that are significantly higher than the other two clusters. Numbers in italic signify means that are significantly lower than the other two clusters. Superscript indicates that this value is not significantly different than the value in the corresponding column. Numbers refer to types of school: 1 = primary, 2 = secondary, 3 = combined. For instance, the first line reads that significant differences existed between primary schools and their secondary and combined counterparts but not between secondary and combined schools.

schools few significant differences emerge. Public/government schools are more highly motivated towards excursions that provide *recreational opportunities* than private/nongovernment schools,  $t = 2.062$ ,  $p = 0.0014$ , but no significant differences were found between any other motivation variables. However, the greatest variation amongst the schools was found to exist between origins between the different states and territories where schools were located. An ANOVA test was run on all states and ter-

ritories before grouping into four categories to include the two closest and largest target markets for the national capital (New South Wales and Victoria) as well as Queensland and an "other category." This initial analysis showed no difference between grouping and not grouping into the other category, so grouping has been carried out for space and practical reasons within this article. Table 5 illustrates a wide range of differences in opinion between states and territories on 13 of the 22 variables.

Table 5  
School Origins Versus School Excursion Motivations

Motivation	Overall Mean Score	NSW Mean Score	QLD Mean Score	VIC Mean Score	Other Mean Score	F	df	Sig.
Attractions with citizenship merit	3.9	3.86 <sup>3</sup>	4.06 <sup>3</sup>	3.90 <sup>1,2,4</sup>	3.67 <sup>3</sup>	3.994	593	0.008
Attractions of national significance	4.1	4.18 <sup>2,3</sup>	4.10 <sup>1,3,4</sup>	4.03 <sup>1,2,4</sup>	3.90 <sup>2,3</sup>	3.504	594	0.015
Natural attractions	3.9	3.85	4.01 <sup>3,4</sup>	4.06 <sup>2,4</sup>	4.00 <sup>3,4</sup>	3.726	784	0.011
Recreational opportunities	3.9	3.72	3.94 <sup>3</sup>	3.94 <sup>2</sup>	<b>4.20</b>	12.265	790	0.000
Breaking/changing routine	3.4	3.34 <sup>4</sup>	3.62 <sup>3,4</sup>	3.67 <sup>2,4</sup>	3.45 <sup>1,2,3</sup>	4.101	789	0.007
Student bonding	4.3	4.17 <sup>3</sup>	4.37 <sup>3,4</sup>	4.32 <sup>1,2,4</sup>	4.39 <sup>1</sup>	4.564	791	0.004
To learn in a new environment	4.2	4.17 <sup>3</sup>	4.40 <sup>3,4</sup>	4.22 <sup>1,2,4</sup>	4.37 <sup>2,3</sup>	5.188	793	0.001
As a reward for children	3.1	2.98 <sup>3,4</sup>	<b>3.35</b>	2.92 <sup>1,4</sup>	3.03 <sup>1,2</sup>	4.929	783	0.002
For new experiences	4.4	4.37 <sup>3</sup>	4.51 <sup>2,4</sup>	4.27 <sup>1,3</sup>	4.53 <sup>2</sup>	3.971	790	0.008
For practical reasons	3.7	3.69 <sup>3,4</sup>	<b>3.91</b>	3.59 <sup>1,4</sup>	3.68 <sup>1,3</sup>	2.965	783	0.031
Access to destination	4.3	4.25 <sup>3</sup>	4.39 <sup>3,4</sup>	4.25 <sup>1,2</sup>	4.45 <sup>2</sup>	3.478	792	0.016
Scenery/scenic beauty	3.4	3.36 <sup>4</sup>	3.59 <sup>3,4</sup>	3.59 <sup>2,4</sup>	3.48 <sup>1,2,3</sup>	3.849	790	0.009
Relevance to studies	4.6	4.66 <sup>2</sup>	4.56 <sup>1,3,4</sup>	4.51 <sup>2,4</sup>	4.50 <sup>2,3</sup>	3.654	795	0.012

Numbers in bold signify means that are significantly higher than the other three clusters. Numbers in italic signify means that are significantly lower than the other three clusters. Superscript indicates that this value is not significantly different than the value in the corresponding column. Numbers refer to states/territories: 1 = NSW (New South Wales), 2 = QLD (Queensland), 3 = VIC (Victoria), 4 = Other. For instance, the first line reads that significant differences exist between NSW, QLD, and Other states/territories while VIC does not have any significant differences with any other categories.

Differences between all groups occurred within the motivations *natural attractions*, *recreational opportunities*, as a *reward for children*, and for *practical reasons*. *Natural attractions* and *recreational opportunities* were less important to schools from NSW compared with all others, while Queensland schools rated *practical reasons* and *attractions with citizenship merit* as more important motivations in undertaking an overnight excursion. Victoria had four instances without statistically different scores and Queensland and the other category both had two instances. Although it is difficult to suggest reasons for such variation amongst these motivations, it should be noted that it appears (from this research at least) that variation amongst schools is more likely to occur based on origins than whether schools are primary, secondary, public, or private schools. More research is required to consider why destination origins appear to have an influence on motivations. Nevertheless, the actual variation in responses may be statistically significant, but variation is quite small with the largest difference being 0.38 between origins and 0.74 from the overall mean score of the sample.

### *Constraints, Barriers, and Funding*

To gather insights into the constraints and barriers of school excursion travel schools were asked if they were able to make as many excursions as they would like, and only 23% answered in the affirmative. The majority (77%) felt that they were restricted

in some way by various constraints. The constraints listed are ranked based on mean scores on a 4-point Likert scale ranging from "not important" to "very important." The primary barrier or constraint in undertaking school excursions was financial considerations. Almost all respondents felt that this was of concern. Secondly, distance to travel was seen as a major concern for those schools that did not undertake as many trips as they would like. From a positive angle, the constraints that appear in the second half of Table 6 deal with issues that marketers are concerned about (i.e., information and knowledge about school excursions, range of attractions, access for the disabled, and medical facilities).

Forty-six percent of schools disclosed that they receive funding to subsidize their school excursions and this funding derives primarily from sources such as pupil contributions (65%), parent funds (54%), the Citizenship Visits Program (17%), and sponsorship (3%). Other funding sources also include student fundraising, the Country Assistance Program, the AASPA, Disadvantage School Program and Student Assistance Fund, ATSIIC, and grants. Public schools in comparison to private schools tend to receive slightly more funding and this is the same for primary schools over secondary schools.

With regard to available funding for school excursions, 30% of respondents were found to be aware of the Citizenship Visits Program (CVP) being funded by the Departments of the Senate and the House of Representatives. This program is a federally funded rebate scheme for remote and regional schools visit-

Table 6  
Barriers to Frequent School Excursions

Constraints	Mean Score	Not Important (%)	Somewhat Important (%)	Important (%)	Very Important (%)
Financial	3.9	0	2	10	88
Distance to travel	3.4	6	10	26	58
Relevance to school curriculum	3.0	19	9	29	43
Timetabling	2.7	18	19	35	27
Staff shortages	2.5	28	21	27	25
Availability of transport	2.4	32	18	25	25
Logistical organization	2.5	20	28	30	22
Lack of time	2.9	19	26	35	20
Appropriate accommodation	2.5	26	20	35	20
Staff willingness	2.2	36	22	27	15
Access to medical facilities	2.1	37	28	25	10
Limited attractions	1.9	45	24	24	8
Facilities for the disabled	1.8	49	28	17	6
Lack of knowledge/information	1.7	52	30	15	3

Table 7  
State or Territory Awareness of the CVP Program

State/Territory	<i>n</i>	Yes (%)	No (%)
New South Wales	439	16	85
Western Australia	55	53	47
Northern Territory	10	40	60
Queensland	156	61	39
Victoria	78	19	81
Tasmania	18	78	22
South Australia	38	34	66
<b>Total</b>	<b>794</b>	<b>30</b>	<b>70</b>

ing Australia's national capital. The result from this question contained no differences in the level of awareness for public and private schools but secondary schools had slightly more awareness than primary schools. However, it appears from Table 7 that the awareness of the CVP is relatively high for areas that are far in distance from Canberra, such as Tasmania (78%), Queensland (61%), Western Australia (53%), and the Northern Territory (40%), although there is major variation in knowledge levels.

#### *Incentives to Visit the National Capital*

Respondents ranked incentives they considered would encourage their visitation to the national capital during the Centenary of Federation year in 2001. These incentives have been ranked accordingly to the level of its attractiveness and range from "not at all attractive" to "very attractive." Table 8 shows that a \$15 cash subsidy for each student is a very attractive incentive given the fact that a majority of schools' decision to coordinate excursions are based

on the amount of funding made available to them. A significant proportion view that a special centenary program would provide an incentive for motivating their school excursions, while the attractiveness of school-friendly attractions is also rated high. Following this is the marketing campaign on what attractions had to offer to schools and the opportunity to meet locals.

In effect, the attributes mentioned, including providing better quality accommodations and having more Parliamentary sittings, ranked consistently well in that they were all highly perceived as incentives towards attracting school excursions. With further analysis, private schools find some of the incentives defined in Table 8 more attractive and encouraging than do public schools (see Table 9), while Table 10 demonstrates that *better quality accommodation*, the *\$15 cash subsidy per student*, and *more school-friendly attractions* were more attractive to NSW schools than some of their counterparts. Items related to school-friendly attractions included educational factors such as both a teacher and student education pack before visitation (89% and 71%) and during visitation (40% and 54%). Other aspects included discounted admission (87%), guided tours (83%), and a picnic area for packed lunches (61%). Lower factors mentioned in the survey included facilities for disabled students (23%) and lecture rooms (13%).

It would appear that the primary constraint from a school's perspective is financial. However, given that a large number of the schools surveyed in this study were unaware of financial subsidies such as the Citizenship Visit Program (CVP) operated by the Commonwealth Government, some of the effects of

Table 8  
Attractiveness of Incentives

Incentives	Mean	Not at all			Very	
		Attractive (%)	Unattractive (%)	Neutral (%)	Attractive (%)	Attractive (%)
A \$15 cash subsidy per student	4.4	4	1	7	26	62
A Special Centenary Program	4.2	1	1	13	49	35
More school-friendly attractions	4.1	2	0	17	47	34
A marketing campaign focusing on what attractions have to offer schools	3.9	3	2	23	45	27
A guarantee to meet your local member	3.8	3	3	28	40	26
Better quality accommodation	3.8	2	1	33	43	22
More Parliamentary sittings than normal	3.7	3	5	33	41	19

Table 9  
School Type Versus School Incentives

Incentives	Public School Mean Score	Private School Mean Score	<i>t</i> -Value	<i>df</i>	<i>p</i> -Value
More parliamentary sittings than normal	3.62	3.77	-1.6282	547	0.003
A guarantee to meet your local member	3.82	3.88	-0.657	546	0.006

this constraint can be mitigated through marketing of such programs to schools. As mentioned earlier, these constraints can be grouped into broad variable groupings of economics, personal/psychological, institutional in the generating region, and the destination region attributes.

### Conclusions and Implications

From the completion of a nationwide latent demand survey the characteristics, motivations, and constraints/barriers for school excursions have been identified and presented. Despite the barriers and constraints for school excursions, schools undertook an average of four school excursions in 1998 for an average of 454 km and many had a specialist excursion planner within the school. Although educational reasons are important motivations for undertaking and legitimizing school excursions, other motivations such as cost-effective attractions and the ability of attractions to cater towards school groups were rated higher than many other educational factors, despite education and learning being stated as the main motivation in the literature.

Financial limitations placed upon school excursion behavior were found to be the largest constraint. If minimal financial support is available, consider-

able planning for the school excursion requires fundraising activities over several months to raise enough funds for the trip and its associated expenses. More attractive discounting and pricing strategies such as advanced bookings and incentives aimed at attracting school groups might be attractive to schools and tour operators. Furthermore, discounted admission may not be enough to attract schools alone, and attraction providers should consider providing educational material both before and during the visit as well as providing services such as guided tours and space for school groups to eat and rest.

The results indicate significant differences amongst the sample, illustrating that the schools market is not homogeneous and different factors may influence their school excursion behavior and choices. Several differences exist between type of school (private, public, primary, secondary) compared with the actual origins of schools and their distance from destinations. Furthermore, an understanding of the differences between curricula versus noncurricula school excursions would also be a useful segmentation exercise. Based on the results of research undertaken on school excursion demand, planning issues, and constraints, destination and attraction marketers in Australia (and for other countries to consider) should:

Table 10  
School Origins Versus School Incentives

Incentives	NSW Mean Score	QLD Mean Score	VIC Mean Score	Other Mean Score	<i>F</i>	<i>df</i>	Sig.
Better quality accommodation	3.91 <sup>3</sup>	3.65 <sup>3,4</sup>	3.90 <sup>1,2,4</sup>	3.64 <sup>2,3</sup>	4.249	571	0.006
A \$15 cash subsidy per student	4.66 <sup>3</sup>	4.07 <sup>4</sup>	4.48 <sup>1</sup>	3.91 <sup>2</sup>	23.270	585	0.000
More school friendly attractions	4.21 <sup>3</sup>	3.99 <sup>3,4</sup>	4.03 <sup>1,2,4</sup>	3.99 <sup>2,3</sup>	3.367	560	0.018

Superscript indicates that this value is not significantly different than the value in the corresponding column. Numbers refer to states/territories: 1 = NSW (New South Wales), 2 = QLD (Queensland), 3 = VIC (Victoria), 4 = Other. For instance, on the first line NSW schools were more attracted by better quality accommodation than schools from QLD or Other states/territories.

- develop more suitable product, such as school-friendly accommodation that caters for medical and disabled students and school-friendly attractions that provide resources and space for students and teachers;
- develop more suitable pricing mechanisms for school excursions, especially for encouraging school groups in the off season and for encouraging early bookings; and,
- develop better distribution networks for information about possible destinations such as school excursion planners, websites, and tour operators to help teachers minimize the time it takes to plan and organize a school trip.

Although this research was undertaken in Australia at a national level, the topic, methodology, and results will be of interest to capital cities and destinations that provide educational and scientific attractions which may cater to the school excursion market. As illustrated in the introductory section, the schools market and the school excursion market is a large market that has the propensity to help support attractions in the off season. However, destinations and attractions that aim to target this market require an understanding of their motivations and constraints, not only from an economic perspective (such as costs and logistics) but also from an institutional perspective (such as the constraints that affect schools, teachers, and pupils). As Ritchie et al. (2003) and Cooper (1999), suggest there is a need to understand the needs of children, the school curriculum, and how schools are managed and make visit decisions. This research has made some progress toward knowledge in this area; however, further research is needed in these three key areas.

First, research needs to occur on the value of educational excursions from both an educational and tourism point of view. From a teacher, schools, and parents' perspective (who often fund such excursions), there needs to be more research on the educational value of such excursions to justify the value and time dedicated to planning and undertaking both overnight and day trip excursions, particularly as schools may have staff shortages. As Ritchie et al. (2003) note, there is little research in this area that may be important in the future as institutional factors and financial pressures restrict school excursion demand and planning. Economists may help to pro-

vide data that addresses these areas, despite the problems of placing an economic or monetary value on educational experiences. From a tourism perspective, more research needs to occur on the economic impact of school excursions, the actual repeat visitation from students, and positive word of mouth to parents and friends. To what extent do school excursion experiences influence pupil and parents' perceptions and future visitation patterns?

Second, further research should also attempt to segment the schools excursion market based on motivations and travel behavior by tourism and education marketers. Marketing strategies should cater for a segmented schools market that is clearly not homogeneous based on the results of this study. This article described research undertaken on overnight school excursions and excluded day trip behavior, which could be a useful area for future research as is research into noncurricula excursions. Geographers may be able to undertake research on the temporal or spatial movements of both day and overnight school excursions to shed more light on the nature of time, distance, and cost constraints. Inevitably, a more dynamic and coordinated approach between attraction operators and destination marketing bodies will be required to overcome constraints such as distance, time, and cost even though organizations may not see either education or tourism as their role. Research could also be carried out on collaboration and the benefits and costs of such cooperation, including joint destination marketing between educational and tourism organizations.

Third, comparisons and further research should be undertaken on school exchange programs and tourism as well as language schools tourism as part of increased research on educational forms of tourism. This will provide increased insights into educational tourism to benefit the long-term development of this segment of the tourism market.

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