



THE INTERNATIONAL SOUNDS AND TASTES OF TOURISM EDUCATION



ANNUAL CONFERENCE PROCEEDINGS OF RESEARCH AND ACADEMIC PAPERS –
VOLUME XXIII

MIAMI AIRPORT HOTEL

MIAMI, FLORIDA, UNITED STATES

20-22 OCTOBER 2011

FLORIAN HUMMEL, EdD, EDITOR

COVER IMAGE

Cover photo courtesy of the Greater Miami Convention and Visitors Bureau

DISCLAIMER

The research reported in these conference proceedings remains the responsibility of the individual researchers/authors

PUBLISHING OFFICE

International Society of Travel and Tourism Educators
23220 Edgewater
St Claire Shores, MI 48082
United States

Telephone/Fax: 586-294-0208
Email: joannb@istte.org
www.istte.org

ISSN 1091-9120

ADVICE:

To cite any papers in this proceedings, please follow this example (in APA editorial format):

Milman, Ady. (2011). Postcards as a reflection of a destination image: An example from Berlin. In F. Hummel (Ed.), Proceedings of the 2011 Annual International Society of Travel and Tourism Educators (ISTTE) Conference, October 20-22, 2011 in Miami, USA (Vol. 23, pp 77-97). St. Clair Shores, MI: International Society of Travel and Tourism Educators.

PREFACE

The 2011 International Society of Travel and Tourism Educators (ISTTE) conference theme is: ‘The International Sounds and Tastes of Tourism Education’. This theme highlights ISTTE’s mission to improve the quality of education and research in the travel, tourism and hospitality industries by providing a forum for international educators, scholars, researchers, executives and government officials to explore current issues related to travel and tourism. Research and academic papers presented at the 2010 conference showcase seven key themes: Teaching & Learning in Tourism Education, Special Interest Tourism, Cruise Tourism, Tourism Marketing, Event Management and Financial Issues in Hospitality Management.

Three types of papers are included in the proceedings: full, poster and working papers. This year 57 submissions across these three categories of research and academic papers were submitted and competed for the opportunity to present at the conference. All entries were subject to a double-blind review process. Twelve were accepted in the full paper category. This represents a 70% acceptance rate in the full paper category. Twenty were accepted in the working paper category and eleven in the poster paper category. Authors with accepted submissions were invited to submit a final paper for the inclusion of the 2011 proceedings. 78% of the accepted papers are coming from authors from US and Canadian Colleges and Universities, 22% from Colleges and Universities across the globe.

On behalf of the ISTTE Board and all ISTTE Members, I would like to thank all the researchers who participated in the paper call process. Our sincere thanks are also extended to all the reviewers who have generously contributed their time and constructive comments to the authors. We are also grateful for the support of all ISTTE officers in their various functions and Dr. Dominic Dillane, President; Michael Sabitoni, the Chairman of the Board; Ms. Joann Bruss, the Executive Director.

Florian Hummel

Research and Academic Papers Committee Chair



Florian Hummel, EdD
Editor, 2011 Annual ISTTE Conference Proceedings

GENERAL INFORMATION

The 2011 Annual Conference devotes several sessions to the academic and research presentations. It is the intent of these sessions to focus on a broad range of topics that are related to education, research, and management in the field of travel, tourism, and hospitality services. ISTTE is an international organization; therefore, submissions from international scholars are highly encouraged. The conference provides a forum for international educators, scholars, researchers, industry executives, corporate trainers, consultants, vendors, administrators, and government officials to explore issues related to travel and tourism at all levels.

CONTRIBUTION AREAS

Contributions were invited for the following subject areas:

- Bridging the gap between industry and education needs
- Cross-cultural studies in travel and tourism
- Emerging issues in travel and tourism education and training
- Innovations and designs for travel and tourism
- Innovative and creative teaching techniques
- Human resources in travel and tourism
- Impacts on the travel and tourism industry
- Information communication technology research for travel and tourism
- International travel and tourism issues and trends
- Marketing and sales in travel and tourism
- Meetings/conventions and events management
- New perspectives of the travel and tourism management
- Perspectives on articulation and/or accreditation
- Sports and entertainment management
- Strategic management of travel and tourism services
- Studies of gaming and entertainment industries
- Sustainable tourism planning and development
- Technological applications in travel and tourism education
- Travel and tourism education and curriculum
- Travel and tourism research issues or cases

TYPES OF SUBMISSIONS:

Refereed Full Papers
Poster Paper Submissions to be Based on Refereed Extended Abstracts
Working Paper Submissions Based on a Refereed Abstract

RECOGNITION OF REVIEWERS

We express our sincere gratitude for the strong support and timely assistance of the reviewers who reviewed the research and academic papers that were competing for a presentation opportunity at the 2011 International Society of Travel and Tourism Educators Annual Conference. Their careful consideration of these papers as well as their thoughtful and informative comments for the authors helped us to identify the best possible papers for presentation at the conference and for these proceedings. Without their significant contribution to ISTTE as well as to the profession and the disciplines of Tourism and Hospitality we could not have produced a quality conference program at Miami.

Thank you for your help and hard work!

Florian Hummel, EdD
Research and Academic Papers Committee Chair
International University of Cooperative Education
Freiburg, Germany

2011 ISTTE Conference Paper Review Committee Members
(in alphabetical order of last name)

Florian Aubke
Researcher and Lecturer
Department of Tourism
and Hospitality Management
MODUL University Vienna
Vienna, Austria

Peter Bohan, Ph.D.
Senior Lecturer
International University
of Cooperative Education
Freiburg, Germany

Roy Cook, Ph.D.
Professor Emeritus
School of Business Administration
Fort Lewis College
Durango, CO, USA

Nicole Davis, Ph.D.
Instructor
Southern Illinois University Carbondale
Carbondale, Illinois, USA

Dominic Dillane, Ph.D
Head of School
School of Hospitality Management and Tourism
Dublin Institute of Technology
Dublin, Ireland

Steven Goss-Turner, Ph.D
Acting Head of School
School of Service Management
University of Brighton
Eastbourne, UK

Ulrike Gretzel, Ph.D
Associate Professor
Institute for Innovation in Business
and Social Research
University of Wollongong, Australia

Peter Hafner
Michigan State University
East Lansing, MI, USA

Joy Huang, Ph.D
Assistant Professor
Department of Recreation, Sport and Tourism
College of Applied Health Sciences
University of Illinois at Urbana-Champaign, USA

Olga Junek
Lecturer
School of International Business
Faculty of Business and Law
Victoria University, Melbourne, Australia

Abey Kuruvilla, Ph.D.
Assistant Professor
School of Business & Technology
University of Wisconsin-Parkside
Kenosha, Wisconsin, USA

Jo-Ann Lester, Ph.D.
Senior Lecturer
School of Service Management
University of Brighton
Eastbourne, UK

Willy Legrand
Faculty
International University
of Applied Sciences Bad Honnef-Bonn
Bad Honnef, Germany

Steven Pike, Ph.D.
Senior Lecturer
School of Advertising, Marketing
& Public Relations
Queensland University of Technology
Brisbane, Australia

Regina Schwab, Ph.D.
Senior Lecturer
International University
of Cooperative Education
Freiburg, Germany

Lorie Tuma,
Lecturer
Central Michigan University
Mt. Pleasant, MI, USA

Clare Weeden Ph.D.
Senior Lecturer
School of Service Management
University of Brighton
Eastbourne, UK

Stuart Lawton
Lecturer
International University
of Cooperative Education
Freiburg, Germany

Teresa Leopold, Ph.D.
Senior Lecturer
University of Sunderland
Sunderland, UK

Ady Milman, Ph.D.
Professor
Rosen College of Hospitality Management
University of Central Florida
Orlando, FL, USA

Volker Rundshagen
Lecturer
Cologne Business School
Cologne, Germany

Stacy Tomas, Ph.D.
Assistant Professor
Dept. of Parks, Recreation
and Tourism Management
NC State University
Raleigh, NC, USA

Paul Walters
Senior Lecturer
Manchester Metropolitan University
Manchester, UK

Peter Wood
James Cook University
Townsville & Cairns, Australia

TABLE OF CONTENTS

<i>FULL PAPERS (STAND-UP PRESENTATIONS)</i>	<i>Page</i>
EVALUATION OF WEBSITE FUNCTIONALITY IN US LODGING INDUSTRY Xu Li, Anil Bilgihan, Youcheng Wang	1-11
SCIENCE BEGETS WINE TOURISM: THE CASE OF KAŠTELA ZINFANDEL Linda Joyce Forristal	12-23
A SOCIOLOGICAL APPROACH TO WEDDING TRAVEL - A CASE STUDY: HONEYMOONERS IN IOANNINA, GREECE Polyxeni Moira, Dimitrios Mylonopoulos, Spyridon Parthenis	24-33
THE SYSTEM OF TOURISM EDUCATION IN ONTARIO, CANADA: PAST, PRESENT, AND FUTURE IMPLICATIONS Kamaljeet Singh	34-50
CONGRESS TOURISM WHILE ON A CRUISE. A CASE STUDY Dimitrios Mylonopoulos, Polyxeni Moira, Spyridon Parthenis	51-62
PRODUCT ATTRACTIVENESS OF KERALA HOUSE BOATS IN PROMOTING TOURISM - A PERFORMANCE ANALYSIS Robinet Jacob, Abey Kuruvilla, Mahadevan P, Asha Kuruvilla	63-76
POSTCARDS AS A REFLECTION OF A DESTINATION IMAGE: AN EXAMPLE FROM BERLIN Ady Milman	77-97
TOURISM DESTINATION COMPETITIVENESS: A REGIONAL COMPARISON Kudzayi Maumbe	98-111
RESIDENTS' PERCEPTION OF THE WORLD EXPO 2010 SHANGHAI Cathy H.C. Hsu, Xiang (Robert) Li, Laura Lawton	112-119
HAVING FUN TOGETHER: EXPLORING LEISURE TRIP ACTIVITY PARTICIPATION OF KOREAN FAMILIES WITH CHILDREN OF DISABILITIES Song Ee Kim, Xinran Y. Lehto	120-133
INDUSTRIAL TOURISM AND AGRICULTURAL TOUR IN HOKKAIDO ITS HISTORICAL UNIQUENESS IN JAPAN AND SIMILARITY TO NORTH AMERICA Etsuko Tsutsumi	134-145
THE QUEST FOR AUTHENTIC EXPERIENCES IN A SMALL ISLAND DESTINATION Robertico Croes, Seung Hyun Lee, Eric D. Olson	146-159

<i>WORKING PAPERS (STAND-UP PRESENTATIONS)</i>	<i>Page</i>
TOURISM AND HOSPITALITY STUDENTS' PREFERRED LEARNING STYLES IN HIGHER EDUCATION IN TURKEY Aysun Ates, Eda Gurel	160-168
EFFECTS OF PSYCHOLOGICAL OWNERSHIP ON STUDENTS' COMMITMENT AND SATISFACTION Lisa Slevitch, Vahagn Asatryan	169-178
THE INFLUENCE OF SELF-EFFICACY AND LOCUS OF CONTROL ON CONFLICT HANDLING STYLES Aydın Paşamehmetoğlu, Şirin Atakan-Duman	179-193
ROOMS DEPARTMENT MANAGERS TENDENCY TO CREATE BUDGETARY SLACK Collin Ramdeen, Scott A. Lee	194-204
EVALUATING HOSPITALITY CORPORATIONS TAKEOVER USING CASH FLOW AND EARNINGS - BASED MEASURES Collin Ramdeen, Scott A. Lee	205-213
SHADES OF GREY: REVIEWING THE MULTI-LAYERS OF DARK TOURISM Clare Lade	214-217
CRUISE SHIP OCCUPANCY RATES: A STUDY OF THE NORTH AMERICAN MARKET Scott A. Lee, Collin Ramdeen	218-225
CRUISE SHIP DESTINATION: AN INVESTIGATION OF CRUISE SHIP OCCUPANCY RATES OF CRUISE SHIPS SAILING ON DIFFERENT ITINERARIES Scott A. Lee, Collin Ramdeen	226-231
TOURISM COMPETITIVENESS INDEX: THE CASE OF CENTRAL AMERICA Robertico Croes, Marketa Kubickova	232-239
SUSTAINABLE TOURISM: AN EXPLORATION OF PAST, PRESENT, AND FUTURE TRENDS AND ISSUES Lena R. McArthur	240-246
COMPARING STUDENT LEARNING STYLES IN TRADITIONAL, BLENDED, AND ONLINE LEARNING ENVIRONMENTS Nicole L. Davis, Sylvia Smith, Stephanie Rhodes	247-255
THE TASTE OF COURAGE, THE SOUNDS OF LEARNING: EXPERIENTIAL LEARNING IN TOURISM EDUCATION PRACTIC Vahagn Asatryan	256-264
STRATEGIC PARTNERSHIP TO IMPROVE TOURISM EDUCATION: UNIVERSITY OF FLORIDA, USA AND THE STATE UNIVERSITY OF NIZHNI NOVGOROD, RUSSIAN FEDERATION Svetlana Stepchenkova, Brijesh Thapa	265-272

A PRELIMINARY INVESTIGATION INTO THE ANTECEDENTS OF VOLUNTEER PARTICIPATION IN MEGA SPORTS EVENTS Kai Natalia Jiang, Honggen Xiao, Hanqin Zhang	273-284
FEMALE GENDER ADVANTAGE IN LEADERSHIP STYLES IN HOTEL OPERATIONS Xiaoyang Zhang	285-295
USING VISITOR SURVEYS TO GUIDE MANAGEMENT DECISIONS: DOES QUESTION FORMAT MATTER? Stacy R. Tomas, Linda Oakleaf	296-301
INVESTIGATING THE CAREER PROFILE OF AUSTRALIAN CELLAR DOOR EMPLOYEES Kim M. Williams	302-308
USING ONLINE MARKETING AS A CUSTOMER RELATIONSHIP MANAGEMENT STRATEGY TO INCREASE CUSTOMER RETENTION AND CUSTOMER SHARE DEVELOPMENT: AN INVESTIGATION AMONG TOURISM BUSINESSES Wei Wang, Shu Cole	309-313
EFFECT OF UNIQUE EXPERIENCES AND PERFORMANCE ON THE QUALITY OF A FUNDRAISING EVENT: INCORPORATING THE INTERNATIONAL (I) SOUNDS (S) AND TASTES (T) INTO A TOURISM (T) EDUCATION (E) FUNDRAISING EVENT Po-Ju Chen, Sivika Senyanuapap, Xu Li, Ji-Eun Lee	314-319

<i>ILLUSTRATIVE PAPERS (POSTER PRESENTATIONS)</i>	<i>Page</i>
FACILITATING ATTENDEE’S SOCIAL EXPERIENCE AT CONVENTIONS Xiaoxiao Fu, Carole Wenqian Zhang, Xinran Y. Lehto	320-328
PERCEPTION OF CROWDING AND EXPERIENCE SATISFACTION IN A BEACH SETTING: EXPLORING THE MODERATING EFFECT OF DESIRED PRIVACY Xiaoxiao Fu, Xinran Y. Lehto	329-338
A COMPARATIVE ANALYSIS OF EVENT ATTENDEES’ SPENDING BEHAVIORS AND SATISFACTION BY VISITOR TYPES Wei Wang, Shu Cole	339-346
HOTEL MANAGERS ATTITUDES TOWARD ENVIRONMENTAL SUSTAINABILITY PRACTICIES Sivika SenyanuapaP, Po-Ju Chen, Fevzi Okumus	347-351
ART AND HOSPITALITY – INCORPORATING WAX CRAYONS AND DRAWING PAPER IN ASSESSING STUDENT PERCEPTION OF THE HOSPITALITY SECTOR Michael M. G. Scantlebury, Erin Pruitt	352-356
CREATING CLASSROOM TO COMMUNITY CONNECTIONS THROUGH EXPERIENTIAL LEARNING Sheri Eachus	357-365
MOTIVATIONS AND EXPERIENCES OF FIRST-TIME AND REPEAT CONFERENCE ATTENDEES Jeeyeon “Jeannie” Hahm, Kimberly Severt, Deborah Breiter	366-371
AN INTERNATIONAL PERSPECTIVE ON APPLICATION OF PSYCHOLOGICAL OWNERSHIP THEORY IN EDUCATIONAL SETTINGS. Lisa Slevitch, Stacy Tomas, Tracy Harkison, Dana Vasiloaica	372-374
DESIGNING LOCATION-BASED SERVICES IN TOURISM BY USING THE DICK AND CAREY SYSTEMS APPROACH MODEL Chen-Hsiung Chou	375-378
ARE YOU STILL ON HOLD? : IMPACT OF INBOUND CALL CENTER WAITING ON SERVICE SATISFACTION Seung Hyun Lee, Heejung Ro	379-389
PRELIMINARY ANALYSIS OF THE NATURE OF BOUTIQUE HOTELS Lilu Gao, Jonathon Day	390-393

EVALUATION OF WEBSITE FUNCTIONALITY IN US LODGING INDUSTRY

Xu Li

Rosen College of Hospitality Management
University of Central Florida, USA

Anil Bilgihan

Rosen College of Hospitality Management
University of Central Florida, USA

And

Youcheng Wang

Rosen College of Hospitality Management
University of Central Florida, USA

ABSTRACT

This study attempts to evaluate US hotel websites from a functional perspective. Data were collected from members of three major hotel associations in the US. The results indicated that the US hotels were not fully exploiting the potential of their websites since the implementation of more sophisticated functions was very limited. It is suggested that the hotels in the US adopt a wide range of marketing applications by adding various transaction and relationship building functions.

KEYWORDS: Hotel marketing; US hotels; Website evaluation; Website marketing.

INTRODUCTION

It is widely acknowledged that the Internet can serve as an effective marketing tool between suppliers and consumers for its capabilities of information dissemination, communication and online transaction (Law, Qi, & Buhalis, 2010). In order to gain competitive advantage and achieve business goals, organizations are increasingly adopting e-business models.

Lodging industry, characterized as customer-oriented and information intensive, has an ideal position to utilize the potential of the Internet (Palmer & McCole, 2000). According to TRAVELCLICK's eTRAK report, hotel internet bookings accounted for 52.3% of all bookings in 2010 and increased by 4.7% compared to 2008. About 67% of online bookings came from the direct online channels (i.e. the major hotel brands' own websites). On the one hand, the Internet erases boundaries created by time and distance and makes it dramatically convenient for guests to search and purchase products and services. On the other hand, the Internet can help hotels identify guests' needs, improve operational efficiency, enhance service quality and thus increase revenue.

Although the Internet offers massive opportunities to hotels, it appears that hotels are missing out on the chance to use the web as an effective business tool (Schmidt, Cantallop & dos Santos, 2008). As a matter of fact, not all companies are able to effectively integrate the Internet into their strategic marketing objectives. Without an in-depth understanding of both machine and human elements subsumed in e-commerce systems, some companies simply chose to duplicate successful websites or establish websites that mirror their traditional brick-and-mortar stores (Hausman & Siekpe, 2009). As a result, browsing, searching and purchasing online become a time-consuming and frustrating experience.

The objectives of the research are (1) to develop a framework for hotel website marketing; (2) to evaluate US hotel websites from a functional perspective; (3) to provide recommendations for US hotels to improve their website performance.

LITERATURE REVIEW

E-commerce and the Hotel Industry

In the past 15 years, e-commerce has experienced a remarkable leap forward (Kim, Ma & Kim, 2006) by growing sales more than 19% a year (Internet Retailer, 2011). Goldman Sachs (2011) predicts that worldwide retail web sales will reach nearly \$1 trillion by 2013. Forrester Research (2009) stated that 63% of US online consumers made web purchase in 2009. E-commerce is also adopted by consumers who seek hotel reservations. The Internet has become a competitive marketing channel in the hospitality and tourism industry by removing potential geographical and physical barriers (Doolin, Burgess & Cooper, 2002). The Internet allows potential customers to learn about hotel facilities and compare prices without contacting a hotel's sales representative or travel agent (Kim et al., 2006). Successfully adopting a more effective e-commerce channel has become a significant matter for hospitality businesses (Kim et al., 2006). Furthermore e-commerce channels provide additional advantages for hotels; for example, O'Connor and Frew (2004) identified that the cost reduction by using electronic strategies in a cheaper distribution system is a key advantage for hotels. Hotels also adopted the Internet as a distribution channel to differentiate themselves from their competitors in the competitive market environment (Kim et al., 2006).

Although e-commerce proposes various benefits for the lodging industry, hotels still have to tackle substantial challenges since the online travel agent's websites handle a significant portion of online reservations (Law & Cheung, 2006). Carroll and Sigauw (2003) noted that selling large volume of hotel rooms on online travel agents' websites draw hotels into a disadvantageous position in the travel market. In order to prevent travelers from purchasing hotel rooms from online travel agents, travelers are persuaded to reserve a room directly on the hotel owned websites (Morosan & Jeong, 2008). Although hotel reservations constitute the second most frequently purchased travel product online (Card, Chen & Cole, 2003). Research is limited in developing a framework for hotel website marketing from a functional perspective.

Hotel Website Evaluation

Hospitality researchers have conducted various studies evaluating hotel websites. Functionality and usability are two important aspects of hotel website performance (Lu & Yeung, 1998; O'Connor & Murphy, 2004). Functionality refers to content of a website while usability is related to website design. Previous studies indicate a list of functions be offered in hotel websites. For instance, Chung and Law (2003) proposed a five-dimension framework of hotel website functionality, consisting of facilities information, customer contact information, reservations information, surrounding area information, and management of the website. Applying marketing mix to the context of the web, Huang and Law (2003) compared websites of luxury hotels between mainland China and Hong Kong. The criteria used in the study contained the marketing mix of 8Ps (i.e. product, place, prices, promotion, people, partnership, packaging and programming) and 4Cs (i.e. customer needs and wants, cost to customer, convenience and communication), and website promotion. Similarly, Schmidt et al (2008) addressed website features from a marketing mix perspective. Websites of small and medium hotels in Spain and Brazil were measured in term of promotion, point-of-sale, price, product, customer relationship and customer retention.

Although there is lack of consensus on what features and functions should be incorporated into hotel websites (Morrison, Taylor & Douglas, 2004), researchers agree that majority of hotels are doing little to exploit the unique transformational potential of the Internet and most hotel websites have a narrow range of functions. Moreover, the compilation of a function list fails to indicate the relationship among various function components. It should be noted that the development of website functions is not a once-for-all practice. Websites grow when the level of functionality and interactivity enhances. "As sites develop from promotion of a company through provision of information to processing of business transactions, layers of complexity and functionality are added. This addition of layers is synonymous with the business moving from a static Internet presence through increasing levels of interactivity to a dynamic site incorporating value chain integration and innovative applications to add value through information management and rich functionality" (Doolin, Burgess, & Cooper, 2002, p.558).

Wang and Russo (2007) argued that a successful commercial website depends on the integrative application of four components as its major function: (1) up-to-date and accurate *information* provision; (2) effective and constant *communication* with consumers; (3) reliable and seamless electronic *transaction*; and, (4) appropriate and sustainable *relationship* building programs. At the basic level, a website must provide timely information. Once the information function has been sufficiently implemented, companies should then consider the communication function, which involves all areas of promotion and marketing research. At this stage, email and contact information are distributed, allowing for a direct exchange of information between the companies and consumers which paves the way for future relationship building. The transaction function enables companies to generate revenue for both internal use and external stakeholders. The relationship component is the core of this model, which is probably the most difficult to implement because of the required technological expertise and lack of knowledge-base

in this area (Wang & Russo, 2007).

Based on Wang and Russo's ICTR (information, communication, transaction, and relationship) model, this study proposed a framework of evaluating functions of hotel websites and applied it to the context of US lodging industry. The framework contains four dimensions of a hotel website: information, communication, transaction and relationship.

METHODOLOGY

Survey Design and Data Collection

The participants in this study were members of three major hotel associations in the US (i.e. American Hotel & Lodging Association, Central Florida Hotel & Lodging Association, and Hospitality Financial & Technology Professionals). The majority of their members were professionals of hospitality industry. They had been working in the industry for many years and had better understanding of the industry. Others were from hospitality schools. They were either educators, who were active in hotel-related research or students, who were receiving specialized trainings and would be future professionals of hotel industry (www.cfhla.org, www.hftp.org). Considering technology expertise and level of experience required in this study, researchers decided to invite only hotel professionals to participate in the survey.

With the collaboration of the hotel associations, researchers were able to access their membership database. First, emails were sent to each of the associations on September, 2008 to notify the purpose of the study and request participation. An online survey was developed and the website address of the online survey was listed in the email communication. All the contact persons agreed to distribute the online survey to their members. Then, the contact person in each association sent an announcement to their members, asking them to take part in the survey. A free copy of the executive summary of the study results was offered as an incentive for responding to the survey. The responses were automatically stored in a database designed by researchers. The website of the survey was accessible from September to November, 2008.

The questionnaire consisted of a list of items for each of the four function dimensions. First, researchers identified the items based on extensive literature review and hotel website observation. A group of experts was then consulted to confirm the appropriateness of the list. The final result includes 16 items for information dimension, 6 items for communication dimension, 10 items for transaction dimension and 10 items for relationship dimension. Second, the results were integrated into a survey questionnaire whereby the usage and perceived importance of each of items in the four dimensions were evaluated based on responses to two questions: (1) whether or not the hotel had implemented each of the items in the four dimensions (0 = no, 1 = yes); and (2) the perceived importance of each of the items in hotels' website marketing efforts. The second question was measured by a five-point scale ranging from "not at all important" (1) to "extremely important" (5). In addition, respondents were asked to report

characteristics of their properties, such as the number of guestrooms, lodging segment, etc.

Data Analysis

The main analysis of current study involved importance performance analysis (IPA). IPA is a tool that allows us to create a two-by-two matrix of the relative positioning of the features, based on high or low importance and high or low performance (satisfaction). IPA yields important insights as to which aspects of the marketing mix a firm should devote more attention, and areas that may be consuming too many resources (Martilla & James, 1977).

A number of researchers have employed importance performance analysis (IPA) in hospitality tourism research (Bilgihan, Cobanoglu & Miller, 2010; Chang & Yang, 2008; Deng, 2007; Frauman & Banks, 2010; Tonge & Moore, 2007; Zhang & Chow, 2004) to pinpoint the differences between customer satisfaction and perceived importance. Hansen and Bush (1999) indicated that IPA is a simple and effective technique that can help researchers in identifying improvement priorities for customer attributes and direct quality-based marketing strategies. Practitioners implement IPA to analyze two dimensions of customer attributes: performance level (satisfaction) and importance to customers.

Central to the analysis, the importance-performance matrix is divided into four quadrants. The location of the cross-hairs that divide the matrix into quadrants is critical since that determines the interpretation of the results. As Martilla and James (1977) suggested, the means for importance and satisfaction of attributes of the derived factors were used as cross-hairs. When median and mean values are close, it is preferred to use the mean as the dividing point to avoid discarding useful information (Martilla & James, 1977).

To measure how effectively hotels had implemented the items in each of the four functional dimensions, a two-dimensional matrix was developed with four possible scenarios. Instead of measuring performance, this study asked hotels to report whether they utilized the items or not on their websites. As shown in Figure 1, Quadrant I indicates a hotel doesn't use the item but perceives it important to its website marketing efforts. Accordingly, the hotel is "missing opportunities". However, if the hotel uses the items and perceives it to be important, a practice of "effective" use of the item is observed (Quadrant II). Quadrant III was labeled "wasting resources", showing the hotel uses the item but does not perceived it to be important to its website marketing efforts. Last, Quadrant IV was characterized as "indifferent", suggesting the hotel does not use the item and does not perceive it to be important.

In this study, the perceived importance was measured by a five-point scale whereby 1 = "not at all important" and 5 = "extremely important." In order to plot all the items into each of the four quadrants, researchers recoded responses into two categories (not important and important). The values ranging from not at all important to slightly

important (1-2) were recoded into “not important” and those ranging from somewhat important to extremely important (3-5) were recoded into “important.”

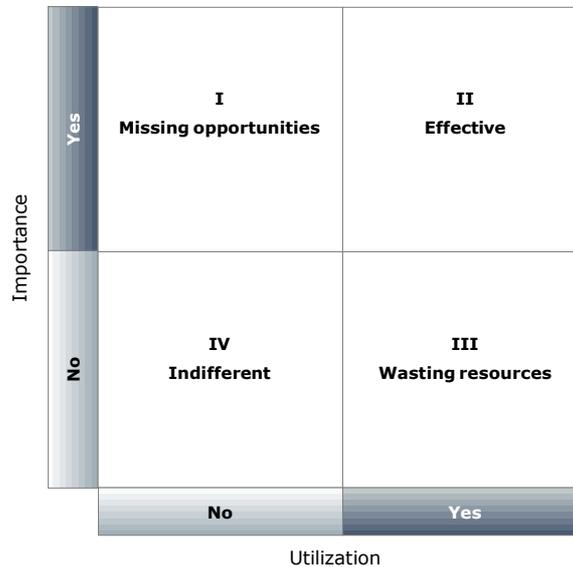


Figure 1. Importance-utilization Matrix

RESULTS

Table 1 showed that the majority of the properties (56.3%) had less than 300 rooms. About 38.7 % of the respondents were from upscale hotels, 31.3% from luxury hotels, and 25% from midscale hotels. Most properties focused on more than one type of markets. Leisure market was the most popular as 80% of the properties concentrated on it. Meeting and business markets attracted 72.5% and 61.3% of the properties respectively. More than half of the properties were independently owned.

Table 1. Hotel Characteristics

Number of guestrooms (n=80)		Lodging segment (n=80)		Target markets (n=80)		Management arrangement (n=80)	
	%		%		%		%
Less than 150	26.3	Luxury	31.3	Leisure	80.0	Independently owned	52.5
151-300	30.0	Upscale	38.7	Business	61.3	Franchised	23.8
301-500	11.3	Midscale	25.0	Meeting	72.5	Management contract	38.8
501-1000	12.4	Other	5.0	Other	7.5	Other	1.3
Over 1000	20.0						

A comparison was made for each of the items in each of the four dimensions in terms of utilization and perceived importance. The results were shown in Table 2. Most of the items in information and communication dimensions were more widely applied than those in transaction and relationship dimensions. For nearly all of the items in the four dimensions, the ratings of perceived importance were always higher than those on utilization. The most prominent discrepancy was identified in the items in the relationship

dimension. A Chi-Square test showed that there was significant difference between utilization and importance for all website items at the 0.05 level. The results indicated that hotels were not fully exploiting the potential of their websites.

Table 2. Comparison of Utilization vs. Importance in Hotel Website Items

Website items	Utilization (% of utilization)	Importance (% of importance)	Chi-Square	Sig.
<i>Information Dimension</i>				
Accommodations information	100.00	100.00	18.988	0.000
Information about the hotel	100.00	100.00	40.408	0.000
Maps/Driving directions	100.00	100.00	18.988	0.000
Amenities information	98.70	97.40	19.036	0.001
Property overview	98.70	79.22	56.741	0.000
Products/Services offered	97.40	100.00	25.992	0.000
Restaurant information	96.14	98.70	65.470	0.000
Photo gallery	93.51	98.70	67.810	0.000
Meetings and Events information	92.00	94.67	76.744	0.000
Destination attraction information	91.55	94.36	41.132	0.000
Shopping information	81.82	88.31	77.933	0.000
Links to regional/city/area pages	77.92	89.61	41.206	0.000
Media/Press	69.23	76.93	49.980	0.000
Employment opportunity	68.00	81.33	26.397	0.000
Virtual tours	66.67	92.00	38.561	0.000
Events Calendar	63.16	85.52	51.297	0.000
<i>Communication Dimension</i>				
Contact information	97.40	97.40	19.072	0.001
Direct email campaign	83.34	91.67	92.280	0.000
Interactive forms	69.86	91.78	77.290	0.000
Search functions	64.48	85.53	25.632	0.000
Other language options	54.29	90.00	55.955	0.000
Frequently asked questions	49.34	80.00	19.046	0.001
<i>Transaction Dimension</i>				
Online reservation	96.10	100.00	26.047	0.000
Secure transactions through SSL	90.14	97.18	87.656	0.000
Online group bookings	66.66	96.00	32.880	0.000
Dining packages	60.00	78.67	18.098	0.001
Spa packages	51.31	80.26	26.153	0.000
Airline and hotel packages	40.00	69.33	22.439	0.000
Attraction tickets	32.89	64.47	21.672	0.000
Online gift shop	23.37	51.95	26.112	0.000
Merchandise/Themed products	22.37	57.90	44.008	0.000
Event tickets	22.36	63.17	22.668	0.000
<i>Relationship Dimension</i>				
Privacy policy	91.90	95.95	118.310	0.000
Special deals and packages	84.00	96.00	42.577	0.000
Customer support	77.78	87.50	65.780	0.000
Cross-selling/up-selling opportunities	73.97	95.89	89.744	0.000
Customer loyalty programs	69.56	91.30	64.177	0.000
Personalization/Customization	67.61	91.55	74.700	0.000
Web seal certificate (e.g., Truste)	64.79	83.10	87.057	0.000
Incentive programs to attract new customers	63.89	88.89	86.682	0.000
Coupons	37.34	62.67	24.819	0.000
Community functions like chat rooms	15.28	48.61	75.420	0.000

The effectiveness of each of the items in the four functional dimensions has been evaluated using the two-dimensional matrix. Using the matrix, four scenarios have been generated for each of the items: (I) missing opportunities (not used but important); (II) effective (used and important); (III) wasting resources (used but not important); and (IV) indifferent (not used and not important). The results were presented in Figure 2.

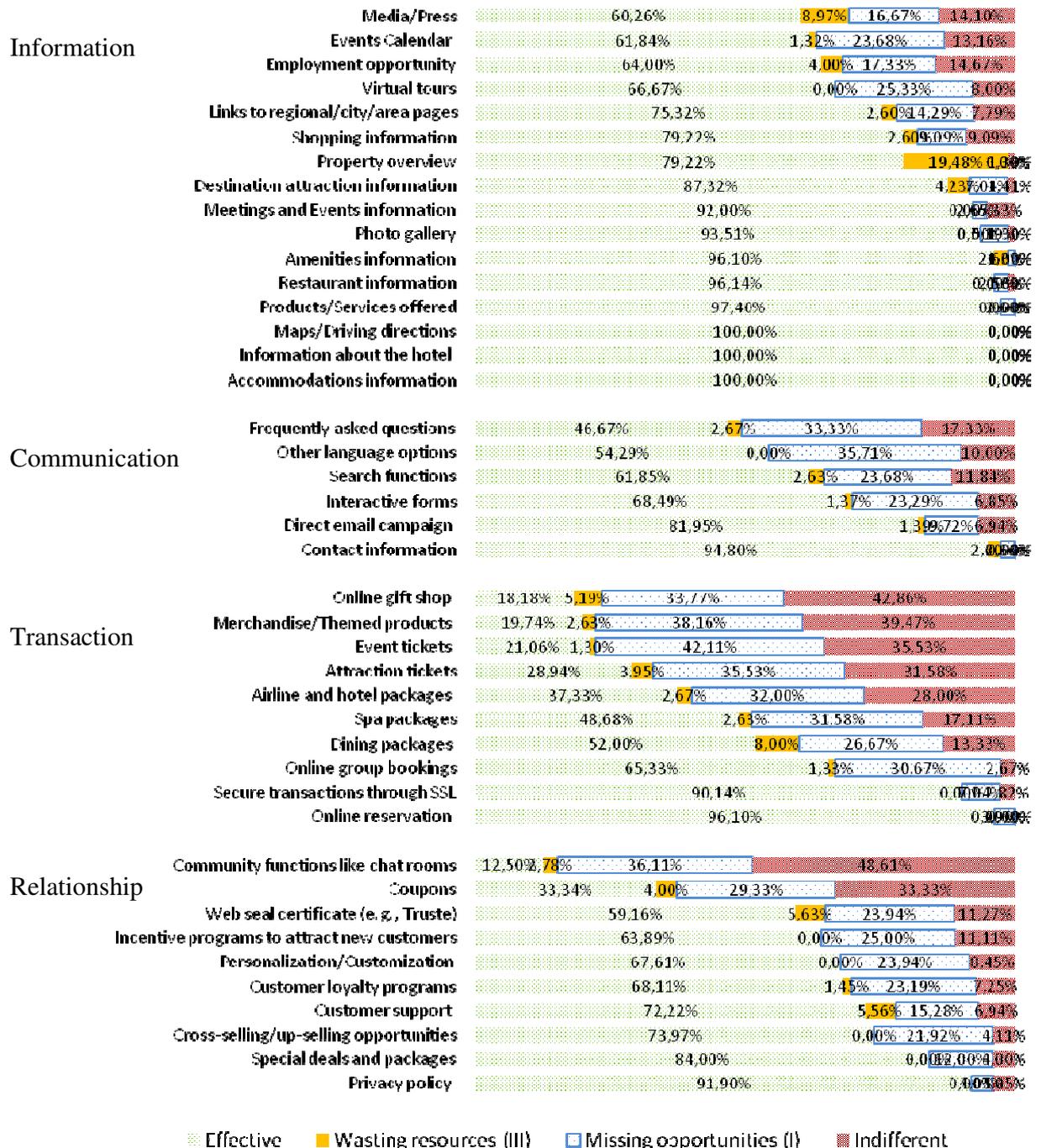


Figure 2. Evaluation of Each Item in Four Functional Dimensions

For information dimension, US hotels were effective in most of the applications, with the effective percentage ranging from 100 for ‘accommodation information’, ‘information about the hotel’ and ‘maps/driving directions’ to 60.26 for ‘media/press’. For communication dimension, the percentage of “effective” was also highest for all the applications. However, more than 30 percent of the hotels reported that they were missing opportunities for the applications of ‘other language options’ and ‘frequently asked questions’ respectively. Great variance could be observed in transaction dimension. “Effective” was identified as the dominating trend for such applications as ‘online reservation’, ‘secure transactions through SSL’, ‘online group bookings’, ‘dining packages’, ‘spa packages’ and ‘airline and hotel packages.’ Nonetheless, about 40 percent of hotels were indifferent to the applications of ‘online gift shop’ and ‘merchandise/themed products.’ Further, two applications of ‘event tickets’ and ‘attraction tickets’ were considered “missing opportunities” by 42 percent and 35 percent of hotels respectively. As for relationship dimension, most applications were effective. Nearly 50 percent of hotels believed that the use of application ‘community functions like chat rooms’ was indifferent to them. The application of ‘coupon’ generated a mixed result, for about 30 percent of hotels were rated to be effective, missing opportunities and indifferent respectively.

CONCLUSION AND IMPLICATIONS

This study examined website strategies in the US lodging industry from a functional perspective. That is, a successful hotel website should integrate business functions of disseminating information, communication, transaction and relationship building with hotel overall marketing strategies. The results indicated that hotels in the US were not able to use their websites to their full potential since the implementation of more sophisticated functions was very limited. It is suggested that they should focus more on transaction and relationship building functions in their future Web marketing efforts.

The identified dimensions with corresponding items were critical for a successful website marketing strategy. Hotels could use the identified items as a checklist for monitoring and improving their website performance. However, the list was not exhaustive or definite forever. As Internet technology evolves, some items might be added to meet new requirement and others might become obsolete and need to be deleted. Therefore, hotels need to upgrade their websites continuously.

Moreover, generalization from this study should be made with caution. For instance, our sample was mainly from luxury and upscale hotels. Thus, the results might be biased towards economy and budget hotels.

REFERENCES

Bilgihan, A., Cobanoglu, C., Miller, B.(2010). Importance-Performance Analysis of Guest Entertainment Technology Amenities in the Lodging Industry. *FIU Hospitality Review*, 28(3), 86-98.

- Card, J. A., Chen, C. Y., & Cole, S. T. (2003). Online travel products shopping: Differences between shoppers and nonshoppers. *Journal of Travel Research*, 42(2), 133.
- Carroll, B., & Siguaw, J. (2003). The evolution of electronic distribution: Effects on hotels and intermediaries. *The Cornell Hotel and Restaurant Administration Quarterly*, 44(4), 38-50.
- Chung, T., & Law, R. (2003). Developing a performance indicator for hotel websites. *International Journal of Hospitality Management*, 22(1), 119–125.
- Chang, H., & Yang, C. (2008). Do airline self-service check-in kiosks meet the needs of passengers? *Tourism Management*, 29(5), 980-993. doi: doi: DOI: 10.1016/j.tourman.2007.12.002.
- Deng, W. (2007). Using a revised importance-performance analysis approach: The case of Taiwanese hot springs tourism. *Tourism Management*, 28(5), 1274-1284. doi: doi: DOI: 10.1016/j.tourman.2006.07.010.
- Doolin, B., Burgess, L., & Cooper, J. (2002). Evaluating the use of the Web for tourism marketing: a case study from New Zealand. *Tourism Management*, 23(5), 557-561.
- Forrester Research. (2009). Retrieved August 28, 2011, from <http://www.forrester.com/rb/search/results.jsp?N=50693>
- Frauman, E., & Banks, S. (2010). Gateway community resident perceptions of tourism development: Incorporating Importance-Performance Analysis into a Limits of Acceptable Change framework. *Tourism Management, In Press, Corrected Proof*. doi: doi: DOI: 10.1016/j.tourman.2010.01.013.
- Goldman Sachs. (2011). Nothing but Net: 2011 Internet Investment Guide by J.P. Morgan. Retrieved August 28, 2011, from <http://tranloi.com/nothing-but-net-2011-internet-investment-guide-by-goldman-sachs/Nothing But Net: 2011 Internet Investment Guide>
- Hansen, E., & Bush, R. J. (1999). Understanding customer quality requirements: Model and application. *Industrial Marketing Management*, 28(2), 119–130.
- Hausman, A.V. & Siekpe, J. S. (2009). The effect of web interface features on consumer online purchase intentions. *Journal of Business Research*, 62(1), 5-13.
- Huang, T. & Law, R. (2002). Modeling and comparing Internet marketing: A study of mainland China based and Hong Kong based hotel websites. In A. J. Frew, M. Hitz, & P. O'Connor (Eds.), *Information and communication technologies in tourism 2003* (pp. 173–182). New York: Springer.
- Internet Retailer. (2011). Industry Statistics - E-commerce keeps growing - Internet Retailer. Retrieved August 28, 2011, from <http://www.internetretailer.com/2011/06/02/e-commerce-keeps-growing>
- Kim, W. G., Ma, X., & Kim, D. J. (2006). Determinants of Chinese hotel customers' e-satisfaction and purchase intentions. *Tourism Management*, 27(5), 890-900.
- Law, R., & Cheung, C. (2006). A study of the perceived importance of the overall website quality of different classes of hotels. *International Journal of Hospitality Management*, 25(3), 525-531.
- Law, R., Qi, S., & Buhalis, D. (2009). Progress in tourism management: A review of website evaluation in tourism research. *Tourism Management*, 31(3), 297-313.
- Lu, M., & Yeung, W. L. (1998). A framework for effective commercial web application

- development. *Internet Research: Electronic Networking Applications and Policy*, 8(2), 166–173.
- Martilla, J. A. & James, J. C. (1977). Importance-performance analysis. *Journal of Marketing*, 41, (1), 77-79.
- Morosan, C., & Jeong, M. (2008). Users' perceptions of two types of hotel reservation Websites. *International Journal of Hospitality Management*, 27(2), 284-292.
- Morrison, A. M., Taylor, J. S., & Douglas, A. (2004). Web site evaluation in hospitality and tourism: The art is not yet stated. *Journal of Travel & Tourism Marketing*, 17(2/3), 233-251.
- O'Connor, P., & Frew, A. J. (2004). An evaluation methodology for hotel electronic channels of distribution. *International Journal of Hospitality Management*, 23(2), 179-199.
- O'Connor, P., & Murphy, J. (2004). Research on information technology in the hospitality industry. *International Journal of Hospitality Management*, 23(5), 473–484.
- Palmer, A., & McCole, P. (2000). The role of electronic commerce in creating virtual tourism destination marketing organizations. *International Journal of Contemporary Hospitality Management*, 12(3), 198-204.
- Schmidt, S., Cantalops, A. S., & dos Santos, C. P. (2008). The characteristics of hotel websites and their implications for website effectiveness. *International Journal of Hospitality Management*, 27(4), 504-516.
- Tonge, J., & Moore, S. A. (2007). Importance-satisfaction analysis for marine-park hinterlands: A Western Australian case study. *Tourism Management*, 28(3), 768-776. doi: DOI: 10.1016/j.tourman.2006.05.007.
- TRAVELCLICK. (n.d.). *Hotel bookings by channel (eTRAK report)*. Retrieved May 10, 2011 from <http://www.travelclick.com/information-center/bookings-by-channel.cfm#2008>
- Wang, Y., & Russo, S. M. (2007). Conceptualizing and evaluating the functions of destination marketing systems. *Journal of Vacation Marketing*, 13(3), 187-203.
- Zhang, H. Q., & Chow, I. (2004). Application of importance-performance model in tour guides' performance: evidence from mainland Chinese outbound visitors in Hong Kong. *Tourism Management*, 25(1), 81-91. doi: DOI: 10.1016/S0261-5177(03)00064-5.

SCIENCE BEGETS WINE TOURISM: THE CASE OF KAŠTELA ZINFANDEL

Linda Joyce Forristal
Hospitality Management, Culinary Arts and Food Science
Drexel University, United States

ABSTRACT

In the early 2000s, on a quest to find the “roots of Zinfandel,” scientists associated with the University of California at Davis collected vines along Croatia’s Dalmatian coast from a little-known grape cultivar named Crljenak kaštelanski. Through DNA profiling, these vines were later identified to be a perfect match for both California Zinfandel and Italian Primitivo. This case study explores the potential of wine tourism arising from this world-class scientific investigation and examines factors that may have contributed to tourism getting off to a slow start, such as the lack of a naming consensus for the grape/vine. It also discusses the newly-proposed Kaštela Zinfandel Wine Path based on an emerging Crljenak kaštelanski wine cluster.

KEYWORDS: Croatian Zinfandel, Croatian tourism, Crljenak kaštelanski, Kaštela Zinfandel, wine clusters, wine tourism

INTRODUCTION

Twenty years ago, Carole P. Meredith, one of the top geneticists and viticulturists at the University of California, Davis, started to use DNA profiling to research the “genetic relationships among some of the classic wine grapes in the world” (Meredith, 2003). After successes in identifying the roots of Cabernet Sauvignon and Chardonnay, Meredith turned her attention to the mystery of Zinfandel. For many decades, wine growers had commented on the morphological and taste similarities between California Zinfandel and Italian Primitivo (Meredith, 2003; Sullivan, 2003:148). Likewise, some Croatian wine growers and scientists believed that Zinfandel was the same grape as Plavac mali (Darlington, 1991; Prial, 2002), Croatia’s leading red wine grape (Sullivan, 2003:160). Meredith was not so sure (Meredith, 2003).

From 1998–2001, Meredith led an international team of American and Croatian scientists in a process analogous to human genome mapping. Their efforts led to the discovery that a little-known Dalmatian grape cultivar with the local name of Crljenak kaštelanski (which means “reddish grape from Kaštela”) was a perfect match for both Italian Primitivo and California Zinfandel, and that Plavac mali was a cross between Crljenak kaštelanski and Dobričić, another indigenous Croatian cultivar (Maletić, Pejić, Kontić, Piljac, Dangl, Vokurka, A., Lacombe, Mirošević, and Meredith, 2004). The vines had been collected from a “mixed vineyard in the coastal town of Kaštela, north of the city of Split” (Maletić, et al., 2004).

This author was immediately fascinated by what was perceived as a compelling wine story coming out of world-class scientific investigation and realized its latent potential for tourism development. However, more than ten years after Meredith's initial investigations, most elements of this story have not yet made it into the tourism guidebooks or into the popular press. Several standard and trusted guidebooks about Croatia, such as *Frommer's Croatia* (Olson, 2006; Olson and Olson, 2010) do not mention Crljenak kaštelanski, Croatian Zinfandel or Kaštela Zinfandel, the town of Kaštela, the village of Kaštel Novi, the work of Carole Meredith and her team of scientists or the emerging figure of Ivica Radunić, the vintner from whose small Kaštel Novi vineyard Meredith's team collected the Crljenak kaštelanski vines for DNA profiling.

METHODOLOGY

This case study is descriptive in nature and explores why "roots of Zinfandel" wine tourism has gotten off to a slow start in Croatia. Sources included primary material obtained from Croatian tourism promoters and suppliers at the regional, national and international level supplemented with in-depth content analysis of popular and scholarly articles, books that mention the work of Carole Meredith's team and Croatian-themed travel guidebooks. The conceptual bases that guided the analysis was the concept of the wine cluster, the role of wine tourism as a developmental tool, and the importance of naming in relation to branding.

Geographical Setting

Croatia is the shape of a boomerang and its geography dictates three climates: continental, mountainous and Mediterranean. The horizontal top half of the boomerang, where Zagreb is situated, is "on the Continent," with cold winters and warm summers. The edge of the vertical bottom half of the boomerang forms the thin Dalmatian coast, while the country's mountainous region lie a few miles inland. Eighty percent of the Dalmatian coast of Croatia has a Mediterranean climate and is dependent on tourism for its survival with wine tourism playing an increasing role. With near-Mediterranean sunshine and warm temperatures, much of the Dalmatian coast is perfect for wine production. In fact, the area experiences a double ripening effect—the direct sun from the south and southwest, as well as the sun's reflection off the Adriatic.

Meredith relayed that during her "Zinquest," some of the vineyards [along the Dalmatian coast] "were so steep we climbed through them holding on to the vines to keep from falling into the Adriatic (Sullivan, 2003:160)." The Dalmatian Coast reminded Meredith of "California's Big Sur in certain places, sloping right down to the sea" (Piljac, 2005:73). The Dalmatian coast is one of the most picturesque landscapes, a key characteristic that is derived in part from its limestone composition, geologically referred to as karst. Postcard-worthy scenes can be viewed and shot around every turn. But beyond its beauty, the "karst-crowned shores of the Mediterranean have been the breeding grounds, a sort of world's nursery of cultivated grapevine varieties" (Piljac, 2005:29).

One of these breeding grounds is the town of Kaštela. So named for its ancient castles, this “town” is comprised of seven villages that line the Adriatic coast between Trogir and Split. The seven villages are Kaštel Štafilić, Kaštel Novi, Kaštel Stari, Kaštel Lukšić, Kaštel Kambelovac, Kaštel Gomilica and Kaštel Sućurac. The castles were built in the fifteenth and sixteenth centuries to protect the rich agricultural lands from pirates. The village of Kaštel Novi, specifically Ivica Radunić’s small winery, is the site where Meredith’s team first collected Crljenaka kastelanski vines for DNA profiling (Piljac, 2005:72–77).

LITERATURE REVIEW

Wine Clusters

Tourists want to have more than one experience at a destination (Kozak, 2003). Clusters are groups of interconnected or inter-related companies in a particular field that are geographically grouped (Porter, 2004). They are linked by commonalities and complementarities. The rationale behind clustering is that co-location can contribute to a competitive advantage in the marketplace. Porter (1990) highlighted three ways clustering enhances competitiveness: 1) by improving productivity, 2) by fostering innovation and 3) by facilitating the commercialization of innovation. Las Vegas is an excellent example of an urban cluster dedicated to a certain mix of themes, such as gambling and entertainment, which has been successful in attracting tourists from around the globe. Another successful rural cluster is the entertainment cluster of country music, comedians and magicians in Branson, Missouri.

In the world of wine, the California wine clusters in Napa and Sonoma valleys are perfect examples of how the clustering of tourism amenities in a rural setting can lead to success and competitive advantage in the marketplace (Porter, 2004). Other successful and studied wine clusters that support tourism include Italy’s Tuscany and Piedmont, the AOC French wine clusters of Bordeaux, Burgundy, and Rhone (Calvet, 2005), Australian wine clusters in Victoria, New South Wales, Western Australia and Southern Australia (Porter and Solvell, 2010), the New Zealand wine clusters of Central Otago, Hawkes Bay and Marlborough (Hall, 2005), South Africa’s wine cluster of the Stellenbosch area, the Niagara wine cluster in upstate New York and Canada, the Colchagua Valley wine cluster of Chile (Guiliani and Martin, 2005), the Serra Gaúcha wine cluster of Brazil (Fensterseifer, 2007).

Wine tourism

Porter’s visualization of the California wine cluster included linkages to tourism and food clusters (Porter, 2004:44). Wine tourism is commonly viewed as a subset of food tourism or gastronomic tourism and is defined as “visitation to vineyards, wineries wine festivals and wine shows,” (Hall, Johnson, Cambourne, Macionis, Mitchell, and Sharples, 2000:3), especially when wine tasting and “experiencing the attributes of the wine region are the primary motivating factors for visitors” (Hall, et al., 2000:3). “Visits to vineyards have been part organized at least since the time of the Grand Tour” (Hall, et

al., 2000:2), if not back to ancient Rome and Greece. Wine tourism is increasingly being recognized as a contributing factor to the attractiveness of a destination (Hall, et al., 2000:1) and is often a key development tool since the wine tourist is often a well-educated, high-income earning professional (Hall, Longo, Mitchell, and Johnson, 2000:163; Howland, 2008).

Due to the intrinsically agricultural nature of grape growing, wine tourism is often by default rural tourism. Alternatively, it can be considered a form of niche tourism or special interest tourism, and can be considered a subsection of cultural heritage tourism and related to culinary tourism. Wine tourism is often most identified by location (Dickenson and Salt, 1982).

One of the newly-investigated wine tourism destinations in New Zealand is the Martinborough area, which is a rural township about one hour's drive from the capital of Wellington at the southern tip of New Zealand's north island. During the past thirty years, the township has undergone a dramatic transformation from a "sleepy hollow" to a very popular "boutique wine village" and today caters to "Pinot pilgrims" and their "in situ consumption of Martinborough's 'fine Pinot Noir wines'" (Howland, 2008).

Naming and Branding

From a business perspective, branding is an important first step and best practice before marketing an entity. Thus, in anticipation for marketing, an important goal of branding is to choose a name, term, symbol or package design that sets a product or service apart from and distinguished from its competition (Keller, 1993; Keller, 2008:2).

From a socio-cultural perspective, the importance of proper naming is tied to the universal and seminal power and role of naming and naming systems for people and places (Tooker, 1984; Basso, 1996) in cultures around the world. Just as birth (and subsequent naming) is considered a key human rite of passage, the appropriate naming a site, attraction or event is the first step towards resultant visitation. According to tourism scholar Dean MacCannell, the naming phase, or 'marking' a site, is an important initial step toward 'site sacralization' (MacCannell, 1974), which has also been interpreted as "resource identification" (Pearce, Morrison and Moscardo, 2003).

Thus, at its root, the name of product, such as wine, or the name of a place or tourism entity tied to a specific place or product, is an important sign or signpost and societal marker (MacCannell, 1976:44). Wine is "often identified by geographical origin" (Hall, 2005) with examples including Burgundy, Champagne and Rioja, all wines now protected by the European Union's Protected Designation of Origin (PDO) status. Hence, steps should be taken to engender or encourage the choice of appropriate naming of a place or a product.

DISCUSSION

In the light of successful wine clusters that support tourism in France, Italy,

California, Australia, and New Zealand among others, there is good reason to explore the possibilities and dynamics of wine tourism in relation to an emerging Croatian Zinfandel or Kaštela Zinfandel wine cluster.

On August 20, 2010, the Regional Development Agency (RDA) of Split-Dalmatia County, along with the Association of Kaštela Zinfandel, organized the first wine tasting of “Kaštela” wine, featuring the wines of fourteen Croatian winemakers (see Table 1). The event took place at Kula Cambi, one of Kaštela’s seven castles, and included the wines of Ivica Radunić, the now-revealed owner of a vineyard located in the village of Kaštel Novi. The RDA has plans to create a Kaštela Zinfandel Wine Path to “enable all tourists and wine admirers to explore vineyards, wine cellars, family farms, and of course, [the] tasting of Kaštela Zinfandel wine” (personal communication with Barbara Govorčin, Regional Development Agency of Split-Dalmatia County, January 13, 2011).

The Regional Development Agency (RDA) of Split-Dalmatia County has also approved an initiative “to establish a cluster of wine producers of Kaštela Zinfandel,” (personal communication with Barbara Govorčin, Regional Development Agency of Split-Dalmatia County, April 13, 2011), in other words, a Kaštela Zinfandel wine cluster. “Within that cluster, wine paths will be determined as well as the other elements (logo, communication and visual slogan)” (personal communication with Barbara Govorčin, Regional Development Agency of Split-Dalmatia County, April 13, 2011). Although the exact stops and sites on the proposed wine path, the design and placement of appropriate signage, and a promotional Website and other material have not been made public, the initial wine path is likely to be guided by the location of and willingness to participate in such as venture by the vintners currently growing the Crljenak kaštelanski cultivar.

Table 1. Geographical location of vineyards (north to south along Dalmatian coast), name of winery (when available) and vintners that participated in the 1st Crljenak kaštelanski wine tasting, August 20, 2010, Kula Cambi in Kaštel Kambelovac

<i>Location of vineyard (vinogorje/ vinograd)</i>	<i>Name of winery (vinarija)</i>	<i>Name of vintner/owner (vinogradar/vlasnik)</i>
Smilčić	Tilia d.o.o.*	Mladen Anič
Kaštela–Trogir	Grabovac	Family Grabovac
Kaštela–Trogir		Ivica Radunić
Kaštela–Trogir		Ivan Kovač
Kaštela–Trogir		Ivo Bedalov
Kaštela–Trogir		Jakša Bedalov
Kaštela–Trogir		Jordan Tadin
Brač		Ivica Arnerić
Sinj-Vrlika		Dražen Krolo
Sinj-Vrlika		Ivica Kovačević
Split-Omiš-Makarska	Kuća sretnog čovjeka (House of a Happy Man)	Nikša Mimica
Split-Omiš-Makarska	Makarska	Zlatan Plenković
Pelješac	Korta Katarina	Mrgudić Bura

Konavle	Konavle d.o.o.*	Family Marinović
---------	-----------------	------------------

*Where d.o.o. means Društvo s ograničenom odgovornošću (i.e., a limited partnership or Ltd.)

As of spring 2011, cultivation of the Crljenak kaštelanski cultivar is concentrated in the Kaštela–Trogir vineyard (see Table 1). However, as the positive effects of clustering (Porter, 1990; Porter, 2004) and promotion develop, the Kaštela Zinfandel wine cluster and the resultant wine path are likely to expand, especially in light of the fact that some vineyards located well outside the Kaštela–Trogir area are currently dedicating acreage to the cultivar. For example, Smilčić is about 125 kilometers north of Kaštela–Trogir and Konavle is south of Dubrovnik, or about 260 kilometers south of Kaštela–Trogir. Another Pelješac peninsula winery growing the Crljenak kaštelanski cultivar is that owned by American AIG CEO Robert Benmosche (personal communication with Barbara Govorčin, Regional Development Agency of Split-Dalmatia County, April 13, 2011), but the wine was not part of the August 20, 2010 tasting.

Evolution in naming

Although they have recently been promoting the use of term Kaštela Zinfandel Wine Path, the grape/vine and wine related to the origins or roots of Zinfandel has been undergoing an evolution in naming over the past decade (Table 2). In light of the importance of naming in relation to branding, it will be important for Croatia tourism community to come to a naming consensus for their promotional efforts.

Back in the early 2000s, when Meredith and her team of scientists were interviewed in the American and British press, the exact location of where Meredith’s team had collected the Crljenak vines was not shared, nor was any of the associated personalities, such as the name of the vineyard owner. One of the first American introductions to this fascinating story was at a Capitol Hill reception on February 1, 2005 hosted by the National Federation of Croatian Americans. Among the guests of honor was Dr. Jasenka Piljac, one of Meredith’s “Zinquest” team members and coauthor of *Zinfandel: A Croatian-American Wine Story*, an English language book on the Croatian origins of the Zinfandel grape (Piljac, 2005).

The grape and the wine that Meredith’s team discovered was referred to as Crljenak kaštelanski in the main scientific paper announcing their research findings (Maletic et al., 2004). In 2003, in his treatise on zinfandel wine writer Sullivan (2003) often abbreviated Crljenak kaštelanski to CK, which he used interchangeably with the pseudo-scientific name for the grape. Crljenak kaštelanski is not a bona fide scientific name for the grape because almost all the grapes in the world are of the genus and species *Vitis vinifera* L. (where the “L” stands for Linneus, the Swedish botanist who started the system of binomial nomenclature in the 18th century that was adopted for the naming of plants and animals globally). Crljenak kaštelanski is just one of many indigenous Croatian cultivars of *Vitis vinifera*. Scientists believe that there are probably more than 150 cultivars that still exist in Croatia today, possibly more than 200. This means that Crljenak kaštelanski is just one of many indigenous grape cultivars that have the potential

to support unique niche wine tourism, especially along the Dalmatian coast. One of the other better-known indigenous Croatian cultivars of *Vitis vinifera* is Plavac mali, a small red grape used to produce Dingač, one of the few Croatian wines readily available outside the country, including those grown and sold by Croatian-born vintner Miljenko “Mick” Grgich.

As late as March 18, 2010, at a tasting of fine Croatian wines at the Croatian consulate in New York City, the more difficult to pronounce Crljenak kaštelanski was still being bantered about during the event, with Croatian vintners and distributors helping attendees in their attempts to pronounce it. However, a shift in naming started as early as 2005 when we see one of the earliest in print mentions of Kaštel Novi and the “drive to find original Croatian Zinfandel” in the aforementioned book by Piljac (2005:72). However, this book had a small print run, was not widely distributed even at the time of publishing and is now out of print.

A more recent development has been the informal use of the term “Croatian Zinfandel” by online wine importers/distributors selling wine derived from the Crljenak kaštelanski cultivar. Frank Dietrich, owner of Blue Danube Wine Company, www.bluedanubewine.com, one of the importers of Croatian wine to the United States, uses the term “Croatian Zinfandel” to promote the sale of Zlatan Crljenak, a wine comprised exclusively of the Crljenak kaštelanski grape, with Google Adwords. His Google ads are designed “to help potential customers understand that this is indeed the exact equivalent of zinfandel; it also designates or implies the origin of zinfandel [i.e., Croatia]” (personal communication with Frank Dietrich, March 30, 2011). However, Dietrich also uses the term Crljenak kaštelanski in his online descriptions of Zlatan Crljenak, and in an earlier email exchange, he described the husbandry of the wine as follows: “Zlatan CK is grown on Makarska while his main vineyards and the winery are on Hvar” (personal communications with Frank Dietrich, January 11, 2011), thus utilizing the aforementioned abbreviation. Hence, we see a mixing of terminology all for the same wine.

The more recent evolution of the name is to “Kaštela Zinfandel,” the name promoted by the RDA of Spilt-Dalmatia in their communications. This new name for the wine and grape effectively ties them both to the specific geographical area where the Meredith teams found, tagged and analyzed the vines. Using this name for the grape, the wine and the wine path will give the potential visitors and wine enthusiasts more concrete clues to the wine’s origin within Croatia. Hence, although there is still some mixing of nomenclatures, the place-based naming convention of Kaštela Zinfandel could become a successful way to connect the wine to its Croatian roots, or in essence, the place of its origin.

Another emerging naming convention is found in the name of Zlatan Crljenak for the Crljenak kaštelanski wine produced by Zlatan Plenković, a renowned Croatian winemaker heretofore famous for this Plavac Mali. Plenković is growing the Crljenak kaštelanski cultivar in the Makarska area, “with the support of Paul Draper of Ridge Vineyards and researchers from the University of Zagreb.” In this case, the name of

vintner has been combined with the name of the grape/vine on the bottle’s label to create a unique name for the wine (i.e., Zlatan Crljenak). Another naming convention was the use of Crljenak/Zinfandela in a Croatian language newsletter (Suhadolnik and Berovič, 2009).

Thus, there is yet no uniform naming for Crljenak-based wines. If the wine is branded with Kaštela in its name, this could lead to increased tourism on its own by bringing awareness to the destination of Kaštel Novi itself or the Kaštela region as a whole. Conversely, names such as Zlatan Crljenak automatically focuses attention on a specific vintner and the cultivar in general instead of “roots of Zinfandel.” The use of this broader term could help disperse tourists over a wider area, thus helping to make tourism more sustainable.

As tourism promotion expands, coming to a naming consensus will be important. It will also be important if Croatia applies to the EU for Protected Designation of Origin (PDO) status for Crljenak kaštelanski cultivar/grape or Kaštela Zinfandel or a controlled wine appellation similar to the French Appellation d’Origine Contrôlée (AOC).

Table 2. Name of the grape/vine and its usage as it has evolved from the early 2000s

<i>Name of the cultivar</i>	<i>Explanation</i>	<i>Usage</i>
Crljenak kaštelanski	The word kaštelanski means “castles in the Kaštela region,” “Crljenak” means little red, so the whole name implies “little red grape from the region with castles” or simply “reddish grape from Kaštela”	In scholarly papers by Meredith’s team, books and newspapers in the early 2000s
Crljenak Kaštelanski	As above, difference is the use of a capital “K” in the second word.	Sullivan (2003)
CK	Crljenak kaštelanski is often abbreviated as CK	In various situations ranging from Sullivan (2003) up to current online descriptions
Croatian Zinfandel	The Croatian origins of Zinfandel wine and grapes are implied in the name. A broader nation-wide “place branding” approach to naming.	One of the earliest usages of this term appears in Piljac (2005). Sample of usage in text of Google AdWords: <i>Croatian Zinfandel</i> <i>The original Croatian Zinfandel</i> <i>Zlatan Crljenak available in USA</i> www.bluedanubewine.com

Crljenka/Zinfandela (Croatian)	Which could be translated into English as Crljenka Zinfandel, where the first word of the name of the cultivar has been used as an adjective	Used in Croatian wine newsletter SVIJET U ČAŠI (The World in a Glass), see Suhadolnik and Berovič, 2009
Kaštela Zinfandel	Zinfandel of the Kaštela, Croatia region. A more localized and specific “place branding” approach to naming.	Regional Development Agency (RDA) of Split-Dalmatia County, January 11, 2011
Kaštelanski Crljenak	Two words reversed	Within official communications from the RDA, see above
Zlatan Crljenak	A combination of a famous Croatian vintner who now grows Crljenak kaštelanski grapes and part of the varietal name Serves to highlight the link between a specific vintner and the land; personalizes the commodities they produce	In 2011, on the label of a bottle of red wine comprised solely of the Crljenak kaštelanski grape grown by vintner Zlatan Plenković near the town of Makarska, southeast of Split along the Dalmatian coast. Zlatan Crljenak is sold distributed by Blue Danube Wine Company and Vinum, USA.

CONCLUSION AND RECOMMENDATIONS

The gap in years since the discovery of Crljenak kaštelanski vines in Kaštel Novi (Maletic, et al., 2004) and the proposal for a Kaštela Zinfandel Wine Path has given the Croatian wine growing community time to develop a nascent network of vintners growing the Crljenak kaštelanski cultivar along the Dalmatian coast before a surge of Zinfandel zealots, much like the Pinot pilgrims in rural Martinborough, start to arrive at their cellar doors. However, since the network is still only loosely defined and not yet publicized, it may be wise to work in tandem with Croatian-based tourism entrepreneurs and regional tourism providers such as hotels and attractions to test out the various components of the proposed wine path and Crljenak kaštelanski wine cluster in order to assess the carrying capacity of its various components. For example, Ivica Radunić only speaks Croatian (personal communication with Croatian-American tourist Alex Matulich, March 27, 2011), thus any wine tourism to his acreage, arguably at the epicenter of the Kaštela Zinfandel wine cluster and Crljenak kaštelanski wine tourism, would need the support of translators or interpreters.

With the right wine clustering and tourism strategies, Radunić's vineyards and others along the Dalmatian Coast could become more economically viable through cooperative efforts, such as by partnering with area assets that include the World Heritage Sites of Diocletian's Palace in Split and the walled-city of Trogir. In fact, as suggested by Porter (2004), multiple attributes often bring synergy and economic vitality. Possible linkages and cooperative efforts should be explored. Also, encouraging and giving governmental support to other Dalmatian vintners who wish to grow the Crljenak kaštelanski cultivar and thereby extend the Crljenak wine cluster could eventually lessen the impact of increased tourism to any one venue.

This author would encourage the adoption of niche tourism over mass tourism approaches to the Kaštela Zinfandel Wine Path destination(s). For example, instead of inviting journalists or editors *carte blanche* or *en masse* to the sites included on the wine path before they may be ready to receive increased visitation, initial steps could include the creation of brochures to educate visitors already vacationing in the Dalmatian area about the "roots of Zinfandel" story and update official Croatian tourism websites to include relevant information. While a consensus should be reached on what name for the cultivar will be used in advertising and promotion, it could also be productive to educate wine tourists and enthusiasts on the various synonyms for the Crljenak kaštelanski cultivar (and wine) in the marketplace ranging from the minimalist "CK" to labeling conventions that combine vintner names with portions of the cultivar's name to Croatian Zinfandel and/or Kaštela Zinfandel.

Additional efforts could include educating tourists about the contributions of Croatian vintners to the global wine industry. For example, Croatian vintner Miljenko "Mike" Grgich escaped communist Yugoslavia in 1954 and eventually ended up in California's wine country in 1958. Grgich, then at Chateau Montelena in Napa, helped catapult California wines to international acclaim when one of his chardonnays took first place in a blind taste test against French white Burgundies that became known as the Judgment of Paris (Piljac, 2005:53), an event immortalized in the 2008 film *Bottle Shock*. Returning home after Croatia declared independence from Yugoslavia in the early 1990s, Grgich opened up a winery at Trstenik on the Peljesac Peninsula and in the late 1990s became an advisor to Carole Meredith in her "Zinquest" (Piljac, 2005:53-55).

And lastly, since there are other important indigenous Croatian grape cultivars that produce excellent quality wine, especially Plavac mali which is sold under the brands Dingač and Postup, there would be opportunities to link or partner the Kaštela Zinfandel Wine Path venues with other wine tourism and wine clusters within Croatia.

REFERENCES

- Basso, S. (1996). Wisdom sits in places: Notes on a western Apache landscape. In Feld, S. and Basso, K.H. (eds.) (1996). *Senses of Place*. New Mexico: School of American Research.
- Calvet, J. (2005). Les clusters vitivinicoles français à AOC. Une analyse en termes de

- biens clubs. *Revue d'économie régionale et urbaine* (4), 481-506.
- Darlington, D. (1991). *Angels' visits: an inquiry into the mystery of Zinfandel* (1st ed.). New York: Henry Holt.
- Dickenson, J. P. and Salt, J. (1982). 'In vino veritas: an introduction to the geography of wine' *Progress in Human Geography* 6, 159-89
- Fensterseifer, J. E. (2007). The emerging Brazilian wine industry: Challenges and prospects for the Serra Gaucha wine cluster. *International Journal of Wine Business Research*, 19(3), 187-206.
- Giuliani, E., & Bell, M. (2005). The micro-determinants of meso-level learning and innovation: evidence from a Chilean wine cluster. *Research Policy*, 34, 47-68.
- Hall, C. M., Johnson, G., Cambourne, B., Macionis, N., Mitchell, R., & Sharples, L. (2000). Wine tourism: an introduction. In C. M. Hall, L. Sharples, B. Cambourne, N. Macionis, R. Mitchell & G. Johnson (Eds.), *Wine tourism around the world: Development, management and markets*. Woburn, MA: Butterworth-Heinemann.
- Hall, C. M., Longo, A. M., Mitchell, R., & Johnson, G. (2000). Wine tourism in New Zealand. In C. M. Hall, L. Sharples, B. Cambourne, N. Macionis, R. Mitchell & G. Johnson (Eds.), *Wine tourism around the world: Development, management and markets*. Woburn, MA: Butterworth-Heinemann.
- Hall, C. M. (2005). Rural wine and food tourism cluster and network development. In D. R. Hall, I. Kirkpatrick & M. Mitchell (Eds.), *Rural tourism and sustainable business*. Buffalo, NY: Channel View Publications.
- Howland, P. (2008). Martinborough's wine tourists and the metro-rural idyll. *Journal of New Zealand studies*, 6/7, 77-100.
- Keller, K. L. (1993). Conceptualizing, measuring, and managing customer-based brand equity. *Journal of Marketing*, 57(1), 1-22.
- Keller, K. L. (2008). *Strategic brand management: building, measuring, and managing brand equity* (3rd ed.). Upper Saddle River, NJ: Pearson/Prentice Hall.
- Kozak, M. (2003). Measuring Tourist Satisfaction with Multiple Destination Attributes. *Tourism Analysis*, 7: 229-40.
- MacCannell, D. (1976). *The tourist: a new theory of the leisure class*. New York: Schocken Books.
- Maletic, E., Pejic, I., Kontic, J.K., Piljac, J., Dangl, G.S., Vokurka, A., Lacombe, T., Mirosevic, N., and Meredith, C.P. (2004). Zinfandel, Dobricic, and Plavac mali:

- the genetic relationship among three cultivars of the Dalmatian coast of Croatia. *American journal of enology and viticulture*, 55(2), 174-180.
- Meredith, C. P. (January, 2002). Looking for Zinfandel in Croatia. *Zinfandel Express*. Retrieved from <http://www.zinfandel.org/default.asp?n1=18&n2=792&member=>
- Meredith, C. P. (2003). Science as a window into wine history. *Bulletin of the American Academy of Arts and Sciences*, 56(2), 54-70.
- Olson, K.T. (2006). *Frommer's Croatia*. Hoboken, NJ: Frommer's.
- Olson, K.T. & Olson, S.B. (2010). *Frommer's Croatia*. Hoboken, NJ: Wiley.
- Pearce P.L., Morrison A.M., and Moscardo G.M. (2003). Individuals as tourist icons: a developmental and marketing analysis. *Journal of Hospitality & Leisure Marketing* 10(1/2): 63–85.
- Piljac, J. (2005). *Zinfandel: A Croatian-American wine story*. Čakovec, Croatia: Zrinski.
- Porter, M. E., (1990). *The competitive advantage of nations*. New York: Free Press.
- Porter, M. E. (2004). *Competitiveness in Rural U.S. Regions: Learning and Research Agenda*. Cambridge, MA: Institute for Strategy and Competitiveness, Harvard Business School.
- Porter, M. E., & Solvell, O. (2010). The Australian wine cluster: supplemental information. *Harvard Business Review*.
- Prial, F. J. (September 11, 2002). Wine talk; A DNA match reveals Zinfandel's parent. *The New York Times*, Section F, pg. 2., column 3.
- Suhadolnik, Ž., & Berovič, M. (Producer). (2009) Nakon Dingača Bura I Postup Mare--Sada I Zinfandel Mare (After Dingač Bura and Postup Mare--Now Zinfandel Mare). *Svijet u Čaši (The World in a Glass)*. Retrieved from http://www.mam-vin.hr/PDF_brojeva/116/4_crljenak.pdf
- Sullivan, C. L. (2003). *Zinfandel: a history of a grape and its wine*. Berkeley: University of California Press.
- Tooker, E. (1984). *Naming systems: 1980 proceedings of the American Ethnological Society*. Paper presented at the American Ethnological Society Central States Anthropological Society Association for the Anthropological Study of Play, Washington, DC.

A sociological approach to wedding travel. A Case Study: Honeymooners in Ioannina, Greece.

Polyxeni Moira

Professor

Technological Education Institute of Piraeus/Greece

Department of Tourism Industry Management

polmoira@teipir.gr

Dimitrios Mylonopoulos

Associate Professor

Technological Education Institute of Piraeus/Greece

Department of Tourism Industry Management

dimilon@teipir.gr

Spyridon Parthenis

Ministry of Culture and Tourism/
Greece

Greece

parthenis_s@mintour.gr

Abstract

Wedding travel are an important part of the tourism industry because of the changing socioeconomic factors. They respond to the demands of modern society for the so called 'good life' and they are thought to give honeymooners social prestige. The present survey consists of qualitative research by means of in-depth interviews with representatives from some important travel agencies in Athens specializing in wedding travel and quantitative research by means of a structured questionnaire distributed to 22 couples about to be married in the town of Ioannina, Greece from June to September 2008. The purpose of this exploratory study is to investigate the destination preferences of the couples about to be married, their interests, their concerns and their expectations from wedding travel.

JEL Classification L83 Sports; Gambling; Recreation; Tourism

Key words: wedding travel, human needs, travel motives, Greece

1. Introduction

Travelling for enriching knowledge, cultural communication and leisure is not a modern invention (McKercher & Du Cros, 2002:1; Mylonopoulos, 2000). For modern man, at least in the developed countries, travelling has become an inner need. This was acknowledged in the United Nations Conference on International Travel and Tourism in Rome in 1963. Moreover, the importance of world tourism for the economic, social and cultural development of the nations was highlighted in the Manila Declaration on World Tourism (WTO, 1980).

Apart from its international nature, tourism became massive after World War II. This phenomenon along with the democratization of tourism, due to technical, economic, social and psychological factors, attracted the researchers' attention to investigate the reasons and motives which make people travel (Maslow, 1943; Cohen, 1972; Perreault et al., 1977; Crompton, 1979; Dann, 1981; Iso-Ahola, 1982; Pearce, 1982; Mayo & Javris, 1981; 1984; Moutinho, 1984; Moutinho, 1986; Jafari, 1987; Schmidhauser, 1989).

The significance of tourism has been largely explored, in terms of motivations (Crompton, 1979; Pearce, 1982; Mansfeld, 1992), experience (Cohen, 1988; Ryan, 1997) and satisfaction (Noe, 1999; Zalatan, 1994). Scholars attempt to study the travellers'/tourists' motives as these set in motion the tourism procedure. Despite the plethora of surveys, no consensus has been reached on a commonly accepted framework of analysis (Jafari, 1987: 151-159). The current analysis is primarily based on the study of theories of motivation, such as Maslow's hierarchy of needs (1943), Iso-Ahola's escape seeking theory (1980) and the push-pull factors (Dann, 1977).

Maslow's hierarchy of needs is often portrayed in the shape of a pyramid with five levels, with the largest and most fundamental levels of needs at the bottom, and the need for self-actualization at the top. It suggests that the most basic level of needs must be met before the individual will strongly desire (or focus motivation upon) the secondary or higher level needs. Later, Maslow partially amended his theory, underlying that it is not necessary for a person to meet completely the needs in one level so that they desire higher level needs. Consequently, a person can be partially satisfied and dissatisfied at the same time in all five levels. This is especially true in the societies of developed countries where people focus motivation upon higher level needs without having previously fully met the needs at lower levels. For instance, although someone may not have their own housing (need for safety), they choose a far away, expensive destination for their holidays, by adhering to the choices and the 'musts' imposed by society for 'a good life' (Swarbrooke and Horner, 2007:54). In a survey in the US, 60% of the respondents answered that travelling corresponds to what 'good life' means; owning a house came second. The previous generation of Americans would be surprised at the thought that someone would prefer travelling to the safety of owning a house. Similar surveys in Europe had the same findings (Gee et al., 2001:71). This individual choice is inscribed in the cycle of 'good life' and either gives a social status [psychological and social need] or is a life goal [self-actualization].

2. The Honeymoon

People usually claim that travels are the most beautiful days of their lives while travelling is often advertised by travel agents as a 'life experience' (Ryan, 1997:194-195). Uzzell (1984:85) considers travelling and vacations as the institutionalized means of a society which allows fantasy and reality to mix. Tourism is an alternative time experience, that is leisure time or holiday time, away from the restrictions of the daily routine (Wang, 2000:216), offering thus a sense of escape and freedom.

So it comes as no surprise that the tourism industry is based on the precondition that vacations are a human need and that every man should have such an experience. This is evidenced in the advertising of the travel industry: «Suggestions for escape», «Fill your dreams»¹, «The whole world in your hands», «Dream holidays»², «Escape ... we have escape plans».

Krippendorf (1987:17) claims that through these options for escape the tourism industry offers strength, energy and makes people happy. According to Hobson and Dietrich (1994:23), tourism is a mentally and physically healthy pursuit in our free time so it is a factor which improves quality of life. Holiday making by a growing

¹ From the promotional campaign of the Greek travel agency «Travel Plan», *I Kathimerini*, 'Travels' magazine, 15 August 2008, p. 11.

² From the promotional campaign of the Greek travel agency «MAP», *I Kathimerini*, 'Travels' magazine, 20 June 2007, p. 37.

number of members of a society is attributed to the improvement in the living standards and economic growth. Vacation time is being extended, the number of tourists is increasing along with the frequency of holiday making as a lot of people go on vacations more than once a year (Doswell, 2002:16).

Kapa Research, a Greek opinion poll company, conducted a survey in the city-region of Athens in 892 households. When asked whether they had made a leisure travel recently, only 10% of the respondents answered negatively. The remaining respondents were distributed as follows: 64.5% had been on a leisure trip in Greece, 5.9% had been abroad while 19.4% had travelled both within Greece and abroad.

The rapid change in the consumer behaviour has allowed holiday making with a special content. Wedding travel, that is holiday voyages undertaken by the newly-wed couple, falls into this category. Today wedding travel have a particular social dimension as apart from the opportunity for the couple to spend some time together and escape from daily routine and family environment, they offer a social status which is further enhanced if the destination to visit is an exotic one. In the past, the prevailing term in Greece, still in use, was 'bridal tour'. It consisted in making a tour in a horse-drawn carriage around the Acropolis in Athens or a two-day excursion in a place near the couple's place of residence. Nevertheless, today honeymoon has wider socioeconomic dimensions, marked by the destination. Honeymooning especially in faraway and exotic destinations meets a series of needs imposed by modern society.

After we had screened the advertisements in the printed and electronic press of the travel agencies and organizations in Greece, it was revealed that a huge number of tourist packages is addressed to newly-married. For example, the Greek travel agency 'Versus Travel' advertises in its website wedding and luxury travels,³ 'Manessis Travel' has a special category of wedding travel while there is a special section where it is mentioned that all individual travels can be turned into wedding packages.⁴ Furthermore, in the website of the Greek travel agency 'Heronia Travel', there is a special category entitled 'wedding refuges', addressed exclusively to newly-married couples⁵, 'Ginis Vacances' offers 'Exotic wedding travels'⁶ while 'Akadimos Travel' just wedding travels.⁷ The suggested destinations are mostly exotic, such as Bali, Seychelles, Maldives, Phuket, Mauritius and Jamaica. Apart from the special ads of the general travel agencies for newly-wed couples, there are numerous specialized travel agencies in Greece and abroad, which organize exclusively wedding travel and have their dedicated websites.⁸ A typical example of this trend in developed countries is that since 1986 a special British magazine 'Wedding and Travel Magazine', has been dedicated exclusively to everything that has to do with wedding travel (e.g. destinations, bridal boutiques, wedding venue providers,

³ http://www.versustravel.eu/?page_id=2239, accessed on 6 March 2011

⁴ <http://www.manessistravel.gr>, accessed on 6 March 2011

⁵ This special section has the following sections: Destinations, Time schedule of the honeymoon, Economic tips, How to choose your hotel, How to choose a romantic room, List with the things to take while on honeymoon, Romantic ideas, Gifts between the couple, Sexy ideas while packing your suitcases, Cheap ideas for honeymoon, Wedding list (<http://www.heronia.com/Default.aspx?ID=205>, accessed on 6 March 2011)

⁶ [http://www.ginis.gr/el/group.php?subcatid=422&subcatgtitle= Honeymoon and Exotic](http://www.ginis.gr/el/group.php?subcatid=422&subcatgtitle=Honeymoon+and+Exotic), accessed on 6 March 2011

⁷ <http://www.acadimotravel.gr/destinations.php?travelgroup=4&lang=1>, accessed on 6 March 2011

⁸ Some of these are: <http://www.weddingtraveler.com/>; <http://www.wedding-travel.com/>; <http://www.alohaweddingtravel.com/>; <http://www.weddinglinksonline.com/>; <http://www.weddingchannel.com/>

photographic studios).⁹ In Greece there are some special editions of magazines specializing in travel and tourism such as 'Voyager'.¹⁰

3. The research methodology

A primary survey was conducted in four travel agencies in Athens¹¹ by means of in-depth interviews in order to explore whether the specialized wedding travel area is a viable segment in the field of tourism. More specifically, the interviewees were asked about the destination preferences of the couples about to be married, their interests, their concerns and their expectations from the wedding travel.

When asked about the factors which led to the establishment of wedding travel as a specialized tourist product, all four interviewees agreed that this was due to the rise of living standards, the rise of educational attainment and the progress of technology. Social reasons were also identified. The respondents claimed that honeymooning is considered a social upgrading and when it takes place in an exotic destination it is thought that it lends the couple a social status and appreciation from family, professional and social surroundings. The survey also showed that there was mobility in the segment of the wedding travel and a growing increase in the demand. The interviewees said that although this segment was profitable it could not become independent.

The organization of wedding travel reflects the business rationale adopted by each travel agency. Some of them have a specialized department for wedding travel, some others offer incentive travels and wedding travel on an equal basis while others organize wedding travel as common individual travel.

As for the preferences of the couples, it was shown that the most popular destinations were mainly the exotic ones (e.g. Maldives, Phuket, Mauritius, Bali, Jamaica, Seychelles, Cuba). The dominance of these destinations is explained by the fact that they have been intensely advertised and established as a trend.

Furthermore, the survey showed that travel agencies offer newly-wed couples some extra services at no charge. For example, they offer discounts varying from 20% to 50% on the cost of the trip, the decoration of the room in the chosen accommodation, fruit basket and wine upon arrival, a souvenir gift, an extra night etc. The range of the services depends on the policy of the travel agency and other factors (e.g. season, destination, duration of the trip).

As for the content of the wedding travel, it was revealed that the couples do not choose packages which include sightseeing, visits to museums and archaeological sites. Newly married couples see the trip as a chance for relaxation, away from the crowd and tiring tours, as they are tired from the wedding preparations. So escape from stress, caused by the wedding preparations, and relaxation are the two dominant factors affecting the couple's choices (Iso-Ahola, 1983:55) along with the psychological need for a lifetime trip.

Finally, it was showed that there is no particular time when wedding travel take place. However, they mostly take place in spring and in autumn.

⁹ <http://www.wedding-travel.com/magazine.aspx>

¹⁰ Voyager, Special edition on wedding travels, summer 2002.

¹¹ The survey was carried out in the following travel agencies: WEDDING TOURS S.A., HERONIA, GINIS and TRAVEL PLAN, interviewing the heads of the department which organized wedding travels.

4. The choices in wedding travel. A survey in the town of Ioannina, Greece.

A primary survey was carried out in the Greek town of Ioannina from May to July 2008 in order to explore the couples' motives, their preferred destinations and the way the cost of the trip is covered. A structured questionnaire with 13 questions was distributed to 22 out of a total of 40 couples about to be married. These couples were going to get married from June to September 2008 in two different parishes of the town. All 22 couples responded to the survey.

4.1. The profile of the couples

The age range of the couples varied from 18 to 50 years old. For women, this was 18-40 while for men it was 26-50. 72.1% of the men and 50% of the women fell into the 26-30 age bracket. The age bracket distribution by gender can be seen at Table 1.

Table 1. Age brackets of the couples about to be married

	<i>Men</i>		<i>Women</i>	
	frequency	%	frequency	%
18-25	-	-	8	36.4
26-30	16	72.1	11	50.0
31-40	5	22.7	3	13.6
41-50	1	4.5	-	-
<i>Total</i>	22	100.0	22	100.0

The survey also showed that 100% of the men were employed while the respective percentage for women was 68.2%. More specifically, there were four male and three female secondary school teachers (18.2% and 13.6% respectively). Moreover, there were three male and four female public servants (13.6% and 18.2% respectively). Thirteen men and four women (59.1% and 18.2% respectively) were self-employed while two men and three women were private employees (9.1% and 13.6% respectively). The employment status of the couples can be seen at Table 2.

Table 2. Employment status of the couples about to be married

	<i>Men</i>		<i>Women</i>	
	frequency	%	frequency	%
Secondary school teacher	4	18.2	3	13.6
Public servant	3	13.6	4	18.2
Private employee	2	9.1	3	13.6
Self-employed	13	59.1	4	18.2
Housewife	-	-	4	18.2
Unemployed	-	-	3	13.6
Student	-	-	1	4.6
<i>Total</i>	22	100.0	22	100.0

As far as the educational attainment of the couples is concerned, 45.5% of men and 68.2% of women have completed secondary education while the respective percentages for those who have completed college/university studies are 45.5% and 31.8%. Only one man has completed graduate studies (Table 3).

Table 3. Educational attainment of couples about to be married

	<i>Men</i>		<i>Women</i>	
	frequency	%	frequency	%
Primary education	1	4.5	0	0,0
Secondary education	10	45.5	15	68.2
College/University	10	45.5	7	31.8
Graduates/Master's	1	4.5	0	.0
PhD	0	.0	0	.0
<i>Total</i>	22	100.0	22	100.0

4.2. Results of the survey

All 22 couples had already arranged a wedding travel. 17 couples (77.3%) were going to travel abroad while 5 couples (22.7%) were going to travel within Greece. More specifically, 8 couples (36.4%) had chosen Europe, 4 couples (18.2%) had chosen Asia, 4 couples (18.2%) Central and Latin America and one couple (4.5%) Africa. (Table 4)

Table 4. Destinations of wedding travel of the participants

<i>Destination</i>	<i>frequency</i>	<i>%</i>
Greece	5	22.7
Europe	8	36.4
Asia	4	18.2
Central and Latin America	4	18.2
Africa	1	4.5
<i>Total</i>	22	100.0

Out of 22 couples, only three (13.7%) had decided to travel in group, that is to be members of a group of travellers participating in the same trip while the remainder 19 couples (86.3%) were going to travel individually. Their responses confirm the views of the heads of the wedding travel departments of the travel agencies that the newly-weds seek for isolation and relaxation. The average length of the trip for the majority (72.7% - 16 couples) was 4-7 days, while the remainder 27.3% (6 couples) would go on holiday for more than 8 days.

As for the reasons which affected their selection of a particular destination, eight couples (36.4%) thought that their honeymoon to the specific destination fulfilled a dream of theirs and considered it as a life experience. Another eight couples (36.4%) saw the honeymoon as an opportunity for relaxation while three couples (13.7%) said that their choice was due to the fact that they had imitated their friends who had been to the same destinations. The full array of reasons can be seen at Table 5.

Table 5. Reasons for selecting a particular honeymoon destination

<i>Reasons</i>	<i>frequency</i>	<i>%</i>
Relaxation	8	36.4
Life experience	8	36.4
Imitating friends	3	13.7
Leisure	1	4.5
The destination has 'something different'	1	4.5
Other reason	1	4.5
<i>TOTAL</i>	22	100.0

Decision making on the selection of the destination is also influenced by external factors. The survey showed that the dominant factor (41.5%) affecting their choice was the travel agency through its personnel and printed advertising material. Moreover, the friends and relatives of the couple influenced the couple's decision making (24.4%). Mass media, especially TV and radio, also affected their choices (21.9%), followed by magazines (7.3%) and the Internet (4.9%). (Table 6)

Table 6. Factors affecting the selection of the honeymoon destination

<i>Factors</i>	<i>frequency</i>	<i>%</i>
Travel agent- advertising	17	41.5
Recommendations from friends and relatives	10	24.4
Mass media	9	21.9
Magazines	3	7.3
Internet	2	4.9

A crucial problem for the newly-weds is the cost of the wedding travel, taking into account the fact that wedding expenses are huge for the couple and their families. The survey revealed that 14 out of the 22 couples paid by themselves for their honeymoon, while nine couples (27.3%) replied that they expected for the cost of the honeymoon to be covered by the money offered to the couple as wedding gifts. In addition to this, four couples (12.1%) said that their families (parents, brothers and sisters) would cover the cost of the trip, while three couples (9.1%) responded that they would pay for the trip by credit card. It is noteworthy that none of the couples chose to get a holiday loan from a bank, although in recent years this option has been advertised as a good solution for someone to support the cost of a holiday trip (Table 7).

Table 7. Ways of covering the cost of the wedding travel

<i>Travel cost funded by</i>	<i>frequency</i>	<i>%</i>
The savings of the couple	14	42.4
The money offered to the couple as wedding gifts	9	27.3
The family as a gift to the couple	4	12.1
Credit card	3	9.1
Other	3	9.1
Holiday loan	-	.0
<i>Total</i>	33	100.0

All the interviewed couples said that they usually went on summer vacations. However, only four couples (18.2%) usually went to Europe while only one couple usually went on long-haul trips. On the contrary, the majority (77.3%) replied that they usually travelled within Greece. As for the length of stay, their summer vacations usually lasted up to seven days (86.4% of the couples) while for 13.6% they lasted from one to two weeks.

What is interesting is that the interviewed couples selected honeymoon destinations which differed from their usual vacation destinations, which explains the fact that for them honeymoon is a life experience, something different or a dream come true. 12 out of the 17 couples who usually spent their summer vacations in Greece were about to travel abroad for their honeymoon and in particular to European

cities (e.g. Rome, Prague, Vienna) which are promoted by travel agencies and considered as romantic destinations ideal for honeymooners. In addition to this, four couples selected a honeymoon destination in Asia (e.g. Phuket, Maldives) and one couple in Jamaica.

Furthermore, three out of the four couples who said they usually travelled to Europe selected different honeymoon destinations. Two of them selected the Caribbean and one couple selected Egypt. The fourth couple selected again a European destination for their honeymoon (Vienna). Finally, the couple that replied that they usually travelled to exotic places, selected again an exotic honeymoon destination in the Caribbean.

5. Conclusion

Wedding travel as a special form of travelling have emerged due to the global socioeconomic changes. Travel agencies capitalize on the new demographic and psychographic data by offering a diversified tourist product which meets the needs, desires and special demands of a couple who is about to be married. Although the bridal trip comes under a special category in the travel industry, most travel agencies cannot organize an independent section dealing exclusively with wedding travel packages, as is the case abroad.

According to the data collected from the above survey, all newly married couples from June to September 2008 in the Greek town of Ioannina went on a honeymoon trip either within Greece or abroad. The factors that influenced their decision making regarding the honeymoon destination were mainly the travel agencies and advertising, followed by the recommendations from friends and relatives. The mass media also had an influential role on decision making as they put forward the idea that the honeymoon to specific destinations and especially to exotic ones is a life experience or something different not to be missed.

REFERENCES

- Cohen, E. (1972). 'Towards a Sociology of International Tourism'. *Social Research*, 39 (1): 164-182.
- Cohen, E. (1988). 'A Phenomenology of Tourist Experiences'. *Sociology*, 13 (2): 179-201.
- Crompton, J. (1979). 'Motivations for Pleasure Vacation'. *Annals of Tourism Research*, 6 (4): 408-424.
- Dann, G. M. S. (1977). 'Anomie, Ego-Enhancement and Tourism'. *Annals of Tourism Research*, 4 (4): 184-194.
- Dann, G. M. S. (1981). 'Tourist Motivation: An Appraisal'. *Annals of Tourism Research*, 8 (2): 187-219.
- Doswell, R. (2002). *Tourism. How effective management makes the difference*, Athens: Kritiki. (in Greek)
- Gee C. Y., Makens, J. C., Choy, D. J. L. (2001). *The Travel Industry*, Athens: Ellin editions. (in Greek)
- Hobson, J., Dietrich, U. (1995). 'Tourism, Health and Quality of Life: Challenging the Responsibility of Using the Traditional Tenets of Sun, Sea, Sand and Sex in Tourism Marketing'. *Journal of Travel and Tourism Marketing*, (3) 4: 21-38.
- I Kathimerini (2007). *Travels* magazine, 20 June. (in Greek)
- I Kathimerini (2008). *Travels* magazine, 15 August. (in Greek)
- Iso-Ahola, S. E. (1980). *The Social Psychology of Leisure and Recreation*, Dubuque IA: W.C. Brown Co. Publishers.

- Iso-Ahola, S. E. (1982). 'Towards a Social Psychological Theory of Tourism Motivation: A Rejoinder'. *Annals of Tourism Research*, 9 (2): 256-262.
- Iso-Ahola, S. E. (1983). 'Towards a Social Psychology of Recreational Travel'. *Leisure Studies*, 2 (1): 45-56.
- Jafari, J. (1987). 'Tourism Models: The Socio-Cultural Aspects'. *Tourism Management*, 8 (2): 151-159.
- Kappa Research (2007). *Tourism Panorama: Results of a Survey*, April. (in Greek)
- Krippendorff, J. (1987). *The Holiday Makers*, Oxford: Heinemann Professional Publishing.
- Mansfeld, Y. (1992). 'From Motivation to Actual Travel'. *Annals of Tourism Research*, 19 (3): 399-419.
- Maslow, A. H. (1943). 'A Theory of Human Motivation'. *Psychological Review*, 50: 370-396.
- McKercher B., Du Cros H. (2002). *Cultural Tourism. The Partnership Between Tourism and Cultural Heritage Management*, New York: The Haworth Hospitality Press.
- Mayo, E. J., Javris L. P. (1981). *The Psychology of Leisure Travel*, Boston: CBI.
- Moira, P., Tsoumanis, K., Chatzilelekas, D. (2003). *Sociology and Psychology of Tourism*, Athens: OEDB. (in Greek)
- Mylonopoulos, D. (2000). 'Naval heritage as a cultural pillar of globalization'. In the Proceedings of the International Conference: «The Mediterranean: the routes of the sea», Naval Museum of Oinousses. (in Greek)
- Moutinho, L. (1984). 'Vacation Tourist Decision Process'. *Quarterly Review of Marketing*, 9 (3): 8-17.
- Moutinho, L. (1986). 'Consumer Behavior in Tourism', *Management Bibliographies and Reviews*, 12 (3): 3-42.
- Noe, F. (1999). *Tourist Service Satisfaction: Hotel, Transportation and Recreation*, Champaign IL: Sagamore Publishing.
- Pearce P. L. (1982). 'The Social Psychology of Tourist Behavior', *International Series in Experimental Social Psychology*, Oxford: Pergamon Press, Vol. 3.
- Perreault, W. D., Darden D. K., Darden W. R. (1977). 'A Psychographic classification of vacation life styles', *Journal of Leisure Research*, 9 (3): 208-224.
- Ryan, C. (1997). *The Tourist Experience*, London: Cassell.
- Swarbrooke, J. and Horner, S. (2007). *Consumer Behavior in Tourism*, 2nd edition, Oxford: Butterworth-Heinemann.
- Schmidhauser, H. (1989). 'Tourist Needs and Motivations'. In Witt, S. F. and Moutinho, L. (Eds), *Tourism Marketing and Management Handbook*, Hemel Hempstead: Prentice-Hall, pp. 569-572.
- WTO (1980). *Manila Declaration on World Tourism*, World Conference, Manila.
- Uzzell, D. (1984). 'An Alternative Structuralist Approach to the Psychology of Tourism Marketing'. *Annals of Tourism Research*, 11 (1): 79-99.
- Voyager magazine (2002). *Honeymoon by Voyager*, summer (in Greek).
- Wang, N. (2000). *Tourism and Modernity: A Sociological Analysis*, Oxford: Elsevier Science.
- Zalatan, A. (1994). 'Tourist Satisfaction: A Predetermined Model'. *Tourism Review*, 49 (1): 9-13.

WEBSITES

<http://www.manessistravel.gr>
<http://www.heronia.com>
<http://www.ginis.gr>
<http://www.weddingtraveler.com/>
<http://www.wedding-travel.com/>
<http://www.alohaweddingtravel.com/>
<http://www.weddinglinksonline.com/>
<http://www.weddingchannel.com/>
<http://www.travelcitycenter.gr>

THE SYSTEM OF TOURISM EDUCATION IN ONTARIO, CANADA: PAST, PRESENT, AND FUTURE IMPLICATIONS

Kamaljeet Singh
Ontario Institute for Studies in Education (OISE)
University of Toronto, Canada

ABSTRACT

Higher education systems are traditionally associated with particular jurisdictions and consist of three basic elements: individual higher education institutions (HEIs); organizations that are directly involved in financing, managing, or operating HEIs; and the formal and informal rules that guide institutional and individual behavior and interactions among actors (Task Force on Higher Education & Society, 2000). The aim of this paper is to examine and critically analyze the system of tourism education in the province of Ontario in Canada. First, and for the purpose of this paper, the boundaries of tourism and tourism education will be defined. Next, the state of the current system of tourism education in Ontario will be examined, paying particular attention to the role of colleges, universities, government, and sector associations and councils. Following this, the socio-political context of Ontario's system of tourism education will be analyzed through a discussion of relevant findings from three reports: (i) the Organization for Economic Co-operation and Development's Tourism Trends and Policies Report (2010); (ii) the Canadian Tourism Human Resource Council's Tourism Labour Supply and Demand Study (2010); and (iii) the Ontario Ministry of Tourism and Culture's Ontario Tourism Competitiveness Study (2009). In light of the findings from these reports, key implications concerning access, quality, and policy for the system of tourism education in Ontario will then be considered. Finally, the paper will conclude by presenting critical observations of Ontario's system of tourism education, with the intention to affect long-term systemic change.

KEYWORDS: Ontario; policy; program quality; student access; system; tourism education.

LIST OF ACRONYMS

CAAT – Colleges of Applied Arts and Technology
CEIC – Canadian Employment and Immigration Commission
CO – Colleges Ontario
COU – Council of Ontario Universities
CTC – Canadian Tourism Commission
CTHRC – Canadian Tourism Human Resource Council
HEI – Higher Education Institution
HOHTO – Heads of Hospitality and Tourism: Ontario Colleges
HRO – Human Resource Organization
ITAL – Institute of Technology and Advanced Learning
MTC – Ontario Ministry of Tourism and Culture

MTCU – Ontario Ministry of Training, Colleges, and Universities
OECD – Organization for Economic Co-operation and Development
OHI – Ontario Hostelry Institute
OTEC – Ontario Tourism Education Corporation
SHSM – Specialist High Skills Major
UNWTO – United Nations World Tourism Organization

INTRODUCTION

Higher education systems are traditionally associated with particular jurisdictions and consist of three basic elements: individual higher education institutions (HEIs); organizations that are directly involved in financing, managing, or operating HEIs; and the formal and informal rules that guide institutional and individual behavior and interactions among actors (Task Force on Higher Education & Society, 2000). In the Canadian context, much work has been done on the relationship between higher education and government, policy, and the political-economy (see for example, Shanahan & Jones, 2009). There has been considerable research concerning community colleges in Canada and the emergence of the baccalaureate program within their institutions (see for example, Skolnik, 2009); and perspectives on globalization and higher education in Canada (see for example, Magnusson, 2000). Inversely, only a select group of published studies has examined the system of tourism education in Canada, with some studies focussing primarily on the provincial systems of Alberta and British Columbia (see for example, Pollock & Ritchie, 1990). So far, no study has addressed Ontario's system of tourism education.

AIM AND OBJECTIVES

The aim of this paper is to examine and critically analyze the system of tourism education in the province of Ontario. Four key objectives have been formulated to achieve the aim. First, and for the purpose of this paper, the boundaries of tourism and tourism education will be defined. Second, a review of the evolution of the system of tourism education in Canada and Ontario will be provided. The state of the current system in Ontario also will be examined, paying particular attention to the role of colleges, universities, government, and sector associations and councils. Third, the socio-political context of Ontario's system of tourism education will be analyzed through a discussion of relevant findings from three reports: (i) the Organization for Economic Co-operation and Development's *Tourism Trends and Policies Report* (2010); (ii) the Canadian Tourism Human Resource Council's *Tourism Labour Supply and Demand Study* (2010); and (iii) the Ontario Ministry of Tourism and Culture's *Ontario Tourism Competitiveness Study* (2009). Fourth, in light of the findings from these reports, key implications concerning access, quality, and policy for the system of tourism education in Ontario are considered. Finally, the paper will conclude by presenting critical observations of Ontario's system of tourism education, with the intention to affect long-term systemic change.

DEFINITIONS

The United Nations World Tourism Organization (UNWTO) and Statistical Commission define tourism as "...the activities of persons travelling to and staying in places *outside their usual environment* for not more than one consecutive year for leisure, business, and other purposes not related to the exercise of an activity remunerated from within the place visited" (Statistics Canada, 2010, p. 20). In 1993, Canada adopted this international definition of tourism when Statistics Canada and the Canadian Tourism Commission (CTC) jointly developed the country's Tourism Satellite Account as a framework, based on the System of National Economic Accounts, that would serve to define tourism; compile and integrate statistics on tourism; measure its importance to the economy; and facilitate its comparison with other industries within the economy (Statistics Canada, 2010).

It must be noted that this international definition of tourism is quite broad in that it includes travel for business purposes; to visit friends and relatives; and for personal reasons such as health treatment (CTC, 1999). On the other hand, travel for study purposes; to obtain employment in a new location; and travel by migrants, diplomats, and armed forces personnel on military assignments are excluded. The definition also does not precisely spell out the notion of *usual environment*, thereby allowing a country to apply its own specifications. The CTC (1999) articulates that for domestic purposes, Canada defines the concept of *usual environment* as the area that is less than 80 kilometres (one-way) from a person's home. However, this distance criterion does not apply to crossing an international boundary, which is considered to be travel *outside the usual environment* regardless of the distance travelled.

From an operational standpoint, the Canadian Tourism Human Resource Council (CTHRC) describes tourism as one of Canada's most diverse economic sectors comprising of five industry groups: accommodation; food and beverage services; transportation; recreation and entertainment; and travel services (CTHRC, 2009). Within the system of tourism education in Ontario, it must be acknowledged that some HEIs use the term *hospitality* to represent programs that relate to the accommodation and food and beverage services industry groups under the overarching tourism sector. For the purpose of this study, tourism will be referred to within the Canadian context of the UNWTO's definition, taking into account the CTHRC's breakdown of tourism industry groups, and the hospitality nuance.

Tourism education is defined by Munar (2007, p. 69) as "...co-constitutive of the tourism system and, as a sub-system, [is] formed by all study, teaching, and other human interactions aimed to keep, develop, enhance, and transfer tourism knowledge to society". The author contends that three levels exist within any system of tourism education: micro, intermediate, and macro. At the micro level, Munar explains that students, researchers, and administrative staff are at the forefront of making the study of tourism a

reality. Next, individual departments, faculties, and research groups that belong to different institutions constitute the intermediate level. Finally, the macro level includes entire institutions that are devoted to higher education, as well as other institutions and associations dedicated to data collection, analysis, and research of the tourism phenomenon (Munar, 2007). In tandem with the aim of this paper, the review and analysis herein will be focussed on Munar's macro level of tourism education systems.

EVOLUTION OF TOURISM EDUCATION IN CANADA AND ONTARIO

MacLaurin (2005) argues that the seeds for formal tourism education in Canada were first sown in the late 1960s. In 1967, the government of Ontario augmented the post-secondary and training system within the jurisdiction by introducing community colleges that started to rapidly diversify their programs based on specialized need (MacLaurin, 2005). By 1969, specialized tourism programs were operating at several colleges and universities, with many hosting peripheral tourism courses mainly within geography departments. Subsequently, MacLaurin maintains that the number of tourism programs and student enrolments grew substantially throughout the 1970s.

In an effort to address the scarcity of well-trained and educated tourism professionals, a multi-stakeholder alliance was formed between industry leaders; community colleges; the Ontario Ministry of Tourism and Culture (MTC); and the Ontario Ministry of Training, Colleges, and Universities (MTCU), which established the Ontario Hospitality Institute (OHI) in 1977. As an organization that was setup to raise the standards of post-secondary tourism programs and to serve as an advocate for the industry in matters relating to tourism education, training, and apprenticeship, the OHI has been instrumental in the establishment of tourism programs at George Brown College, Niagara College, Canadore College, and Georgian College over the years (MacLaurin, 2005).

Due to the impact of the recession in the early 1980s and the need for a new funding scheme for skills development and job retraining, the Federal Minister responsible for the Canadian Employment and Immigration Commission (CEIC) introduced the National Training Act in 1981. MacLaurin contends that the Act was introduced "...both as a correction of 'misdirected training initiatives' of the federal and provincial governments, and an attempt to increase the public awareness that these considerable funds came from the federal government" (p. 9). During this time, the CEIC developed a list of occupations that held national importance to become recipients of millions of special funding dollars. Interestingly, MacLaurin notes that despite tourism representing the single largest source of employment in Canada and greatest employment growth, tourism occupations were excluded from this designated list.

Over the 1980s, alliances were formed between Tourism Canada, the CEIC, the Canadian Tourism Advisory Committee on Human Resources, and the Canadian

Hospitality Institute as a 'call to arms' that was initiated in response to the serious threat of reduced government funding for tourism (Cooper & MacLaurin, 1986). This resulted in the National Manpower Strategy report being released in 1983, which essentially delineated the tourism manpower requirements that both industry and government agreed were necessary.

As part of the federal government's Sector Council Program in the early 1990s, thirty councils were created with funding assistance from the government to address labour market issues for specific economic sectors. In 1993, the CTHRC was formed as a non-profit organization to represent the labour market interests of the tourism sector with a Board of Directors with representatives from business, labour, industry, education, and government (MacLaurin, 2005). The CTHRC works in partnership with a network of Human Resource Organization's (HROs) across the country (one in each province/territory) that form the backbone of the council. Each HRO represents the industry, workers, education, and government from their respective jurisdictions at the national level and operates as the exclusive distributor of all CTHRC programs and products within their respective jurisdictions (MacLaurin, 2005).

CURRENT SYSTEM IN ONTARIO

The province of Ontario is home to an internationally respected system of higher education (MTCU, 2011). The system is coordinated by the MTCU, which is the policymaking, monitoring, and planning body that is responsible for issues around access, funding, and program quality. Components of the system include: universities; Colleges of Applied Arts and Technology (CAATs); agricultural colleges; colleges of health sciences and of art; a military college; privately funded degree-granting institutions; and registered private career colleges (Shanahan, Fischer, Jones & Rubenson, 2005). Out of the 20 universities and 24 CAATs across Ontario, six universities and all CAATs offer tourism-related programming (MTC, 2009).

The central objective of CAATs is to serve the needs of the labour market (Shanahan et al., 2005). Programs that are offered by CAATs have to be approved by the MTCU and can consist of certificate programs that are one-year or less in length; two- to three-year diplomas; and apprenticeships. Some CAATs also offer programs in partnership with a university to grant both a degree and a diploma while others may offer a variety of co-op programs (MTCU, 2011). The introduction of the *Postsecondary Education Choice and Excellence Act, 2000* officially extended applied degree-granting status to the CAATs in Ontario. Some CAATs have been designated Institutes of Technology and Advanced Learning (ITALs) and given the authority to have up to 15% of their students enrolled in degree programs (Shanahan et al., 2005). Examples of diploma/certificate and degree programs that are currently offered at CAATs across Ontario are provided in Tables 1 and 2, respectively (Ontario Colleges, 2011).

Table 1. Examples of Tourism Diploma/Certificate Programs at Ontario's CAATs

<i>CAATs</i>	<i>Diploma/Certificate Program</i>	<i>Department</i>	<i>Length</i>
Algonquin College	Diploma in Outdoor Adventure	Department of Outdoor Adventure	2 years
Centennial College	Graduate Certificate in Culture and Heritage Site Management	School of Hospitality, Tourism and Culture	1 year
Seneca College	Diploma in Hotel and Restaurant Management Optional (Co-op)	School of Tourism	2 years

Table 2. Examples of Tourism Degree Programs at Ontario's CAATs

<i>CAATs</i>	<i>Degree Program</i>	<i>Department</i>	<i>Length</i>
Algonquin College	Bachelor of Hospitality and Tourism Management	School of Hospitality and Tourism Management	4 years
Humber College (ITAL)	Bachelor of Applied Business in Tourism Management (launching in September 2011)	School of Hospitality, Recreation and Tourism	4 years
Niagara College	Bachelor of Applied Business in Hospitality Operations Management	School of Hospitality and Tourism Management	4 years

Currently, under the *Postsecondary Education Choice and Excellence Act, 2000*, the MTCU provides funding to universities and gives them degree-granting authority (Shanahan et al. 2005). Each university in Ontario operates under its own distinct provincial charter as an independent non-profit corporation and determines its own academic and admissions policies, programs, and staff appointments. All publicly funded universities offer three- or four-year undergraduate bachelor degrees, as well as post-graduate or masters and doctoral degrees, and professional programs (MTCU, 2011). The range of undergraduate and graduate tourism degrees that are currently offered at universities in Ontario are highlighted in Tables 3 and 4, respectively. It also must be noted that although the University of Waterloo offers a Doctoral program in Recreation and Leisure Studies, a tourism-specific Doctoral program has not yet been developed within an Ontario-based university.

Table 3. Undergraduate Tourism Degree Programs at Universities in Ontario

<i>Universities</i>	<i>Undergraduate Program</i>	<i>Department</i>	<i>Length</i>
Brock University	Bachelor of Arts in Tourism, Sustainability, and Environment	Department of Tourism and Environment	4 years
Lakehead University	Bachelor of Outdoor Recreation in Leadership; Parks; or Tourism	School of Outdoor Recreation, Parks, and Tourism	4 years
Laurentian University	Bachelor of Physical and Health Education in Outdoor Adventure Leadership	School of Human Kinetics	4 years
Ryerson University	Bachelor of Commerce in Hospitality and Tourism Management (Co-op)	Ted Rogers School of Hospitality and Tourism Management	4 years
University of Guelph	Bachelor of Commerce in Hotel and Food Administration; or Tourism Management (Co-op)	School of Hospitality and Tourism Management	3 years
University of Waterloo	Bachelor of Arts (Co-op) in Recreation and Leisure Studies; Recreation and Sport Business; or Tourism and Parks Management (launching in September 2011)	Department of Recreation and Leisure Studies	5 years

Table 4. Postgraduate Tourism Degree Programs at Universities in Ontario

<i>Universities</i>	<i>Postgraduate Program</i>	<i>Department</i>	<i>Length</i>
Lakehead University	Masters of Environmental Studies in Nature-Based Recreation and Tourism	School of Outdoor Recreation, Parks, and Tourism	2 years
University of Guelph	Masters of Business Administration in Hospitality and Tourism Management, or Food and Agri-Business Management (online)	School of Hospitality and Tourism Management	2 years

<i>Universities</i>	<i>Postgraduate Program</i>	<i>Department</i>	<i>Length</i>
University of Waterloo	Joint Masters of Arts/Masters of Environmental Studies in Tourism Policy and Planning	Department of Recreation and Leisure Studies; and Department of Geography and Environmental Management	2 years (Masters)
	Doctoral program in Recreation and Leisure Studies (PhD)		4 years (PhD)

Other key actors within Ontario's system of tourism education are: Colleges Ontario (CO); the Council of Ontario Universities (COU); the Heads of Hospitality and Tourism: Ontario Colleges (HOHTO); and the Ontario Tourism Education Corporation (OTEC). As the advocacy and outreach association for Ontario's CAATs and ITALs, CO advocates for policy improvements and measures that will assist in producing the skilled workforce required for strengthening Ontario's competitive advantage (CO, 2011). Representing Ontario's 20 universities, the COU fosters discussion amongst its member institutions on a wide range of university issues such as funding, graduate studies, international relations, and accessibility (COU, 2010). The COU works closely with both the MTCU and the federal government on public policies in an effort to strengthen the ability of Ontario's universities to foster talent, research, and innovation, and contribute to economic and social well being (COU, 2010).

Within Ontario's college sector, it must be acknowledged that Deans of tourism departments across the CAATs and ITALs in the province have formed a strategic alliance called HOHTO. This organization is a key member of the MTCU and has an instrumental role in improving the quality of higher education and workplace opportunities for young people entering and working in the tourism sector (HOHTO, 2010). HOHTO works collectively to share policies and procedures, strengthen the management of resources, and facilitate transferability options for students across its member institutions. HOHTO also works to support the mandate of the MTC, and essentially provides a link between industry and education to ensure that highly qualified and skilled people are being prepared for careers in the tourism sector (HOHTO, 2010).

In Ontario, OTEC takes on the role of provincial tourism sector council. OTEC is an independent, non-profit organization that was created in 1991 to serve the training and human resource development needs of the tourism sector in Ontario (OTEC, 2011). Its core mandate is aligned with that of the CTHRC, as OTEC is Ontario's designated HRO, representing national tourism sector council programs and initiatives across the province. In working with the higher education system in Ontario, OTEC develops partnerships with colleges and universities offering tourism programs to support the integration of industry standards and certifications into institutional curricula in an effort to better prepare students for careers in tourism (OTEC, 2011).

SOCIO-POLITICAL CONTEXT

Analyzing the socio-political context at the international level is the Organization for Economic Co-operation and Development's (OECD) *Tourism Trends and Policies Report* that was published in 2010. This report identified key challenges that are facing tourism sectors across all member countries and provided an outline of potential policy scenarios that may be utilized to address these setbacks. On the other hand, the report maintains an optimistic tone as it states: "...despite short-term crises, international travel has shown itself capable of relatively rapid recovery" (OECD, 2010, p. 52). The key challenges facing tourism as identified by the report are: globalization and changing markets; economy-wide impact of tourism; climate change and sustainability; the knowledge economy; human resources; and productivity and competitiveness. The OECD (2010) states that these challenges will influence the longer-term development and success of the tourism sector along with agendas for public policy action. For the purpose of this paper, only the challenge pertaining to human resources will be discussed.

The human resource challenge is expressed in the OECD report as the labour or skills shortages that tourism sectors across various member jurisdictions are either currently experiencing, or are forecasted to experience in the near future. The OECD attests this shortage to competition for labour from other more productive sectors. Particularly, and from a supply (or employee) perspective, the OECD highlights the ability for other sectors and industry groups to offer better salaries, career development opportunities, and easier working conditions. From a demand (or employer) standpoint, the OECD recognizes that this labour shortage will result in difficulty for the tourism sector to attract and retain the best employees. Consequently, the OECD contends that the tourism sector would constantly require new skills in order to meet changing tourism trends. The OECD states: "... a failure to deal with labour or skills shortages may impede tourism's growth, because low quality can diminish productivity and damage the industry's competitiveness" (p. 57).

At the national level, the CTHRC (2009) reports that the tourism sector, across its five industry groups, represents 10.3% of workforce in Canada or 1.66 million workers. Provincially, Ontario represents the largest employer of the Canadian tourism labour market with 37.6% of the sector's workforce, followed by Quebec at 22% and British Columbia at 16.4%. In its latest *Tourism Labour Supply and Demand Study*, the CTHRC (2010a) contends that although weak economic conditions have provided a temporary reprieve from workforce shortages, "...spending on tourism goods and services in Ontario is projected to rise from \$58.7 billion in 2007 to \$86.8 billion by 2025, fuelling the demand for labour" (p. 1). Accordingly, the CTHRC forecasts the potential demand for tourism labour in Ontario to rise from about 631,600 full-year jobs in 2007 to over 845,300 by 2025. However, the potential supply of labour in Ontario's tourism sector is projected to grow much more slowly during this period, from the equivalent of 621,600 full-year jobs in 2007, to about 765,300 in 2025.

The CTHRC attributes this sluggish growth in tourism supply to the rising numbers of ‘baby boomers’ retiring over the next 15 years, fewer younger people entering the workforce, and a declining birth rate. Hence, the CTHRC forecasts that this incongruence between the supply and demand of tourism labour will result in Ontario experiencing a labour shortage by 2013, with potentially more than 80,000 full-year jobs being left unfilled by 2025. Figure 1 displays Ontario’s potential tourism labour shortage and also provides a sub-provincial breakdown of the shortages as forecasted for Toronto, Ottawa, and Niagara Falls.

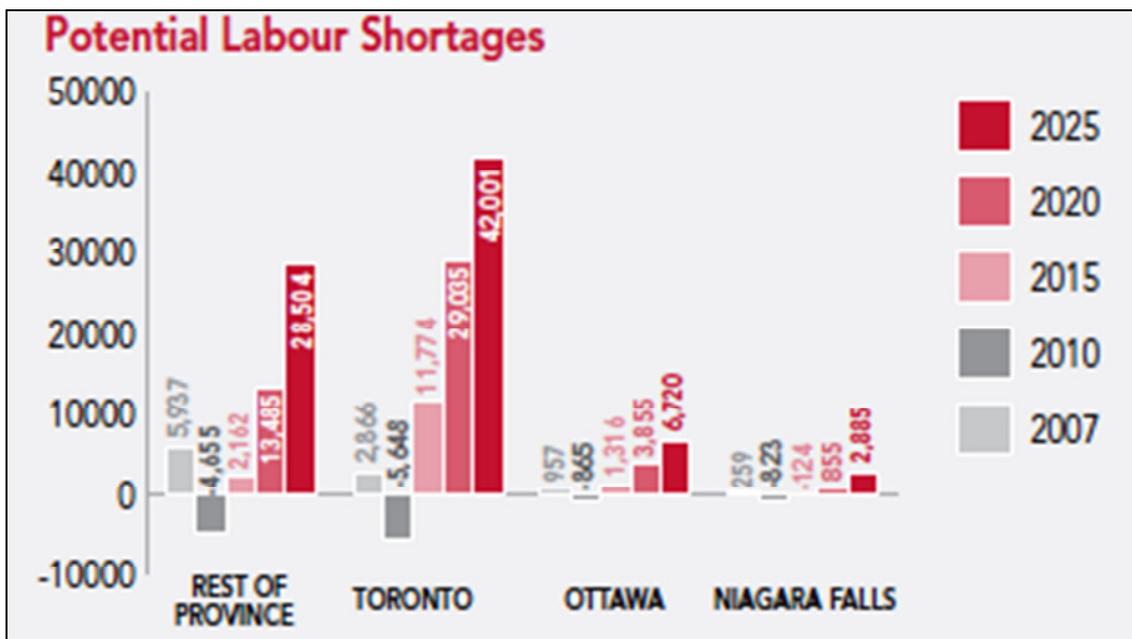


Figure 1: Potential Labour Shortages in Ontario’s Tourism Sector (CTHRC, 2010a, p. 1)

From Figure 1, it is clear that more than half of Ontario’s tourism labour shortage will be felt in Toronto. Also, the CTHRC reports that labour shortages in Ontario are projected to be most acute in the food and beverage services, and recreation and entertainment industry groups, with 58,836 and 10,722 full-year jobs left unfilled respectively.

The MTC’s *Tourism Competitiveness Study* report provides the socio-political context at the provincial level. Fundamentally, the MTC (2009) established a 2020 vision for tourism in Ontario by identifying a series of 20 strategic directions to support the continued growth and sustainability the sector. Interestingly, one of the strategic directions clearly articulates a vision for Ontario to develop a world-renowned workforce and become an international leader in tourism training and education. In doing this, the report states that there is a need for Ontario’s “... six universities and 24 colleges with programs in either hospitality, tourism, or culinary arts, as well as a number of

apprenticeship programs [to] work together so that they have the potential to create a standard of excellence for industry employees” (p. 11).

Within the discourse of this strategic direction, the MTC acknowledged two key challenges that face the tourism sector in Ontario: the pending labour shortage in the sector; and the need to train great tourism workers to ensure that provincial service quality is top notch. The MTC also indicated that participants of the study raised concerns about the need for more people to consider a career in tourism. Although the MTC concedes to the fact that there is no overarching provincial strategy to meet the tourism sectors needs, it provides a hopeful stance in the recognising a “...tremendous opportunity for industry, government, and academic institutions to collaborate on tourism workforce needs” (p. 42). In setting the context for next steps, the MTC clearly specified that it must work with the MTCU to ensure that tourism needs are included in strategies to develop a knowledge-based economy.

IMPLICATIONS FOR STUDENT ACCESS

Taking into account the socio-political context provided in this paper, it is argued that the looming labour shortage facing the tourism sector in Ontario is of highest significance to stakeholders in the province’s tourism education system. HEIs need to respond swiftly and effectively to specific calls for action that have been articulated by the aforementioned reports. As mentioned previously, Deans of college tourism programs across the province have initiated the HOHTO alliance group that works collaboratively with government and industry on preparing highly skilled students for the workforce. Although this is a healthy initiative, it is contended that there needs to be a concerted effort to increase the ability for youth, particularly high school students, to access tourism programs at HEIs, and three possibilities are presented here.

First, it is argued that HEIs should intensify their relationships and collaboration with the Ontario secondary school system so that high school students are provided with opportunities to explore and pursue postsecondary programs in tourism. For example, HEIs should establish or strengthen partnerships with high schools that offer the Ontario Ministry of Education Specialist High Skills Major (SHSM) program. SHSM programs are Ministry-approved, specialized programs that are designed to allow Grade 11 and 12 students to focus their learning on a specific economic sector (including Hospitality and Tourism) while meeting the requirements for the Ontario Secondary School Diploma. This program has been active since the 2005-06 school year to assist students’ with their transition from secondary school to one of four postsecondary pathways: apprenticeship training; college; university; or the workplace (Ontario Ministry of Education, 2008).

Second, considering the ambiguity around tourism careers and the stigma of tourism being a ‘stop-gap’ employment sector (MTC, 2009), it is contended that HEIs should work in partnership with the CTHRC and OTEC to design industry-specific career

path models for new students to be aware of as they begin their educational journey in tourism. This may include input from sector stakeholders concerning entry criteria and career laddering opportunities within the five industry groups of tourism. Coupled with the National Qualifications Frameworks that already exists for the tourism sector (see Appendix 1), it is argued that this approach would potentially alleviate many concerns that youth have about tourism as viable a career option.

Third, it is believed that enhancing articulation between college and university programs would greatly assist in expanding student access to further credentialing and a more productive workforce. MacLaurin and Shanahan et al. both acknowledge that this is an area that has traditionally been neglected by Ontario's higher education system at large, although some institutions have individually pursued articulation agreements. In this regard, it is suggested that HOHTO, MTC, and the MTCU work collaboratively to develop a rubric for tourism program articulation within the system that can potentially be customized by individual institutions to allow for program nuances.

IMPLICATIONS FOR PROGRAM QUALITY

Since improved student access may result in higher enrolments at HEIs, there is a possibility that program quality may be eroded over the long-term through larger class sizes, and strain on faculty teaching loads. Therefore, it is proposed that practitioners and administrators at HEIs consider two initiatives. First, blended curriculum consisting of hands-on skills and theory within a college program; or business and social science for a university degree, could assist with improving program quality at HEIs. As programs begin to appeal to students with varying learning styles and differing career pathways, it is argued that institutional performance relating to student satisfaction rates and the quality of learning experiences within programs would experience a positive impact. In turn, this may improve student access and cause a potentially recurring cyclical outcome, while HEIs continue to develop highly skilled professionals to meet the changing needs of the tourism workforce.

Second, HEIs can work towards developing new and innovative measures of program quality in addition to the MTCUs standardized framework. The WTOs TedQual Certification System is an example of an external mechanism that aims to improve the quality of tourism education, training, and research programs globally (UNWTO, 2008). Evaluation criteria for the TedQual system are universally applicable to any institution. They also are defined to measure the efficiency of an academic system, as well as its degree of incorporation of the tourism sector and students needs into existing programs (UNWTO, 2008). Implementing such measures can only enhance the image and profile of tourism programs at HEIs, which could then have spin-off effects on student enrolments, industry engagement, and employment in the sector.

IMPLICATIONS FOR TOURISM EDUCATION POLICY

Amoah and Baum (1997) contend that the basis for any system of tourism education is the formulation of tourism education policies, which are derived from the convergence of both tourism and education environments at a national or provincial level (see Figure 2). Theoretically, *ad hoc* implementation of tourism education policies should essentially be eliminated through this act of convergence. Amoah and Baum explain that the tourism environment incorporates the tourism sector, its markets, and the impact of tourism on a province or country; while the education environment consists of institutions at all levels of learning. As policies are generally observed en route to implementation, Amoah and Baum argue that tourism education policy must be developed through consultation with parties from both the tourism and education environments.

Amoah and Baum's framework does not refer to any particular time frame. The dotted lines denote the current human resource environment in tourism, characterized by the absence of clearly articulated and coherent policies. Here, it is the tourism and education environments that collectively exert influence on tourism education. With no stabilizing elements in place, tourism education can lean towards one side more than the other, depending on which is more influential and the formal roles played by stakeholders on either side of the framework. The solid arrows, on the other hand, indicate the desired route for tourism education policy formulation and implementation.

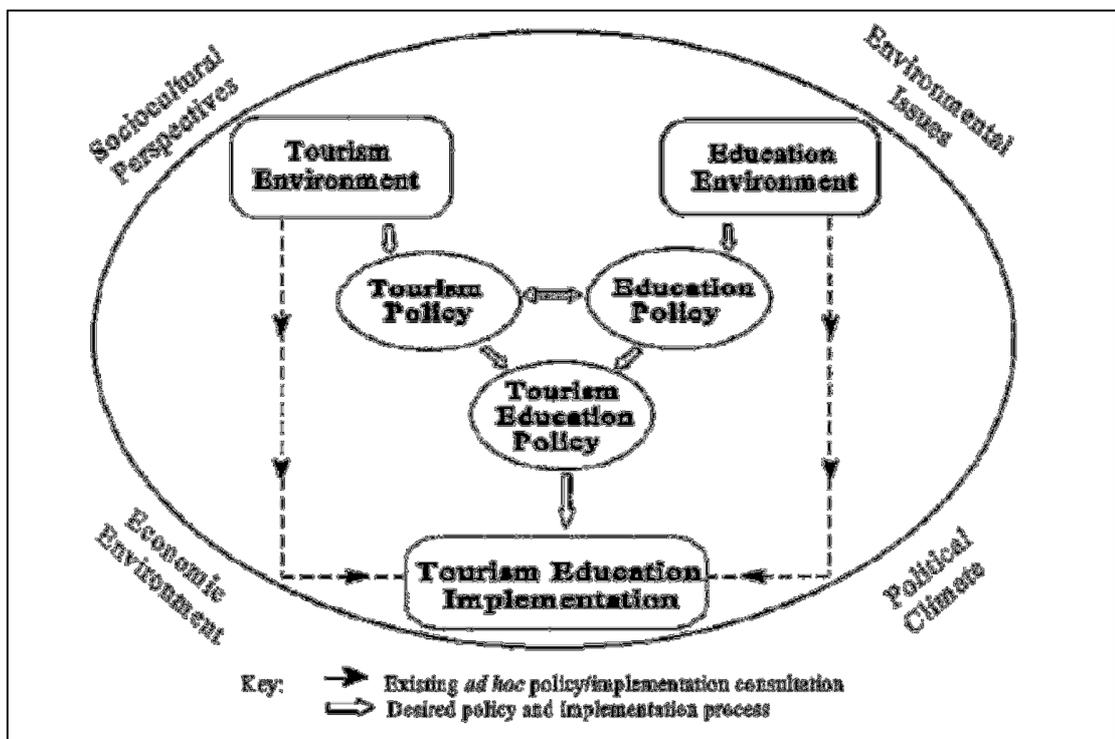


Figure 2. Policy Routes for Tourism Education (Amoah & Baum, 1997, p.10)

Ontario's tourism sector is facing an imminent labour shortage along with an ageing population, retiring 'baby boomers', declining birth rates, and youth not wanting to establish careers in this sector. Upon situating Amoah and Baum's framework within the context of Ontario's system of tourism education, it becomes clear that the primary stakeholder groups involved in tourism education policy in Ontario would be the provincial government; sector councils; and education institutions. To illustrate, two potential policy scenarios will be discussed.

First, in line with a recommendation by the CTHRC (2010b), it is argued that a tourism education policy should be developed to accelerate the pace at which new immigrants to Canada enter the tourism workforce in an effort to offset labour shortages. This would potentially involve collaboration between the Ontario Ministry of Citizenship and Immigration, the MTCU, the MTC, the CTHRC, OTEC, and HEIs. However, addressing some of the current barriers and challenges that immigrants face so that they can get their first job in the tourism sector more quickly after receiving immigrant status would have to be an explicit policy priority. As an incentive for tourism sector participation, the policy also could provide tax incentives for attracting, training, and retaining immigrant talent. According to the CTHRC (2010b), this type of policy could potentially increase the tourism sector's labour supply to fill 30,360 full-year jobs by 2025, thus meeting approximately 38% of the forecasted shortage.

Second, it is contended that a comprehensive provincial tourism education policy, as suggested by the MTC (2009), should be developed to support training standards and ensure that they are aligned with quality standards and best practices in innovation, technology, and management. In this case, the policy scenario above would be integrated into a broader provincial policy that also would include collaborations with the Ontario Ministry of Education and provincial Boards of Education. This would ensure that there is coordination between all levels of learning, an avoidance of duplicating efforts, and a systematic and sustainable regulatory framework for tourism education in Ontario designed to support student achievement and sector competitiveness.

CONCLUSION

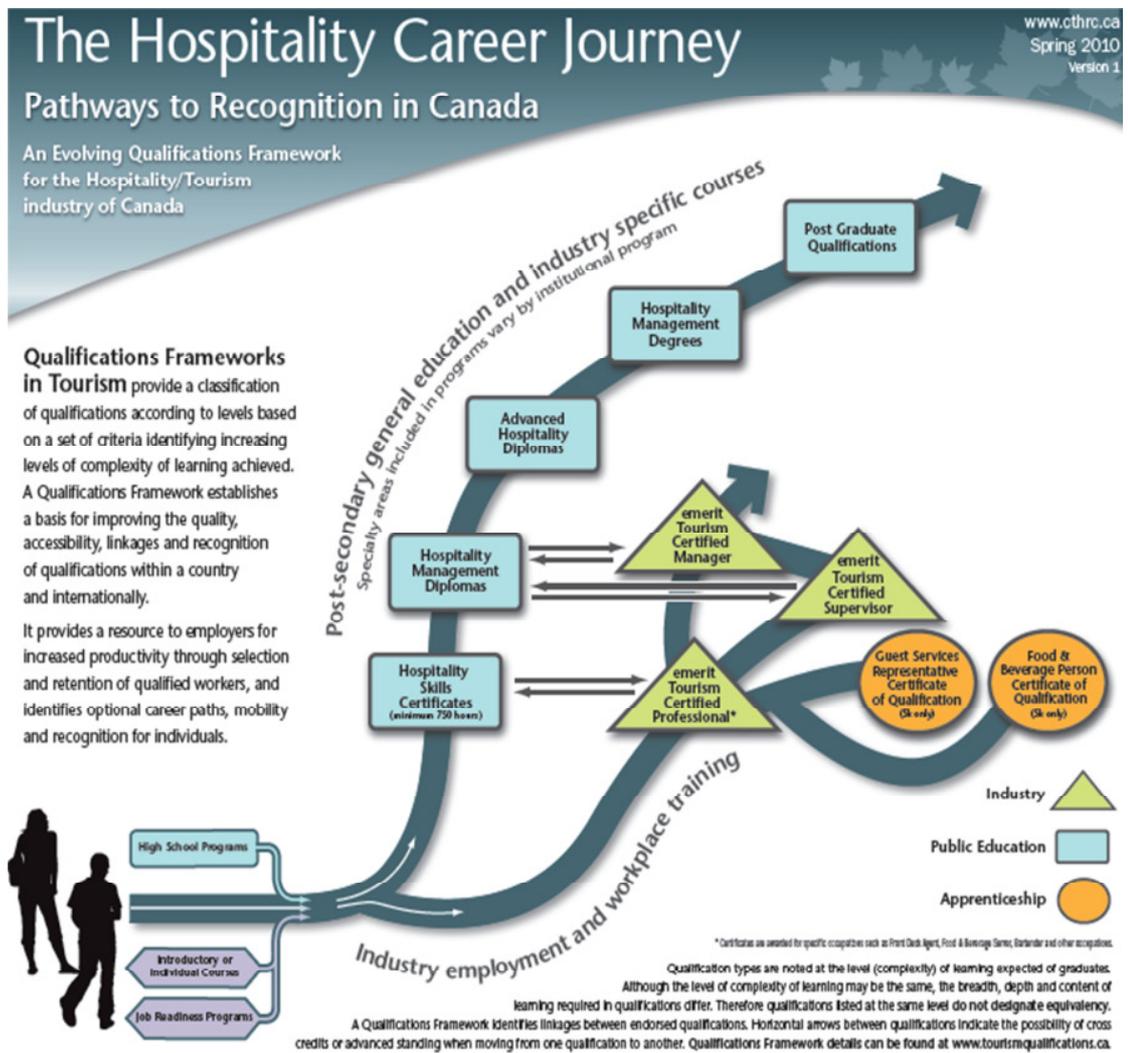
In closing, it is the view of the researcher that due to the historical focus of Ontario's system of tourism education on vocational skills development, an image or stigma of tourism as being a 'stop-gap' sector and not career-friendly has concurrently evolved. As a result, the sector has experienced a loss of research investment, and is now facing major labour shortage issues and challenges in attracting youth to enter the sector and develop careers in tourism. Considering the size of Ontario's tourism workforce relative to the rest of Canada, and the sector's forecasts for continued growth, stakeholders must make a robust attempt to work together and take on a more comprehensive approach to system reform. It also is the hope of the researcher that this paper will stimulate further research in the field and add to the almost non-existent body of literature concerning the system of tourism education in Ontario.

REFERENCES

- Amoah, V.A. and Baum, T. (1997). Tourism Education: Policy Versus Practice. *International Journal of Contemporary Hospitality Management*. 9(1), 5-12.
- Canadian Tourism Human Resource Council (2009). *Demographic Profile of Tourism Sector Employees*. Retrieved from http://cthrc.ca/~media/Files/CTHRC/Home/research_publications/labour_market_information/ttse/Demopro_prov_ON.ashx
- Canadian Tourism Human Resource Council. (2010a). *The Future of Canada's Tourism Sector: Economic Recession Only a Temporary Reprieve from Labour Shortages: Ontario*. Retrieved from http://cthrc.ca/en/research_publications.aspx
- Canadian Tourism Human Resource Council. (2010b). *The Future of Canada's Tourism Sector: Economic Recession Only a Temporary Reprieve from Labour Shortages: National Summary*. Retrieved from http://cthrc.ca/en/research_publications.aspx
- Canadian Tourism Human Resource Council. (2010c). *Qualifications Frameworks*. Retrieved from http://cthrc.ca/en/research_publications/credential_recognition
- Colleges Ontario (2011). *Mission and Priorities*. Retrieved from <http://www.collegesontario.org/colleges-ontario/mission-and-priorities.html>
- Cooper, B.M. and MacLaurin, D.J. (1986). A Pluralistic Alliance-Training Within the Canadian Hospitality Industry. In: *Proceedings of the International Training and Personnel Conference for the Hotel and Catering Industry*. Middlesex, England: The Hotel and Catering Industry Training Board, 19-31.
- Council of Ontario Universities (2010). *Who We Are: How we operate and the kind of work we do*. Retrieved from <http://cou.on.ca/About/who-we-are.aspx>
- Heads of Hospitality and Tourism: Ontario Colleges. (2010). *HOHTO Mandate*. Retrieved from <http://hohto.ca/>
- MacLaurin, D. (2005). Tourism Education in Canada: Past, Present, and Future Directions. *Journal of Teaching in Travel and Tourism*. 5(1), 1-25.
- Magnusson, J. (2000). Canadian Higher Education and Citizenship in the Context of State Restructuring and Globalization. *Encounters on Education*. 1, 108-123.
- Munar, A.M. (2007). Is the Bologna Process Globalizing Tourism Education? *Journal of Hospitality, Leisure, Sport, and Tourism Education*. 6(2), 68-82.
- Ontario Colleges (2011). *Program Category: Culinary, Hospitality, Recreation and Tourism*. Retrieved from <http://www.ontariocolleges.ca/portal/page/portal/ONTCOL/SearchResult?No=0&Dym=1&Np=1&N=1000061&Nty=1&Qo=20&metaTagParam=nil>
- Ontario Ministry of Education. (2008). *Specialist High Skills Major Implementation Guide - Draft 2007-08*. Toronto: Queen's Printer for Ontario.
- Ontario Ministry of Tourism and Culture. (2009). *Discovering Ontario: A Report on the Future of Tourism*. Retrieved from http://www.mtc.gov.on.ca/en/regions/discovering_ontario.shtml
- Ontario Ministry of Training, Colleges and Universities (2011). *Post-Secondary Education*. Retrieved from <http://www.tcu.gov.on.ca/eng/postsecondary/schoolsprogramms/>
- Ontario Tourism Education Corporation (2011). *About OTEC*. Retrieved from <http://www.otec.org/site/about/index.asp>

- Organization for Economic Co-operation and Development (2010). *OECD Tourism Trends and Policies Report*. Retrieved from http://www.oecd.org/document/24/0,3746,en_2649_34389_44607576_1_1_1_1,00.html
- Pollock, A. and Ritchie, J.R.B. (1990). Integrated Strategy for Tourism Education/Training, *Annals of Tourism Research*, 17, 568-585.
- Shanahan, T. and Jones, G. (2009). Shifting Roles and Approaches: Government Coordination of Post-Secondary Education in Canada, 1995-2006. In M. Tight, K.H. Mok, J. Huisman, and C.C. Morpew (Eds.), *The Routledge International Handbook of Higher Education*. New York: Routledge, 315-325.
- Shanahan, T., Fisher, D., Jones, G., and Rubenson, K. (2005). *The Case of Ontario: The Impact of Post-Secondary Policy on Ontario's Higher Education System*. New York: Alliance for International Higher Education Policy Studies (AIHEPS).
- Skolnik, M.L. (2009). Theorizing about the Emergence of the Community College Baccalaureate. *Community College Journal of Research and Practice*. 33 (2), 125-150.
- Statistics Canada. (2010). *Human Resource Module of the Tourism Satellite Account: A Pilot Study for Ontario*. Retrieved from <http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=13-604-M2010065&lang=eng>
- Task Force on Higher Education and Society (2000). *Higher Education in Developing Countries: Peril and Promise*. Washington DC: World Bank.
- United Nations World Tourism Organization. (2008). *UNWTO Education and Training*. Retrieved from <http://www.unwto-themis.org/en/programmes/tedqual>

APPENDIX 1



National Hospitality Qualifications Framework (CTHRC, 2010c)

Congress tourism while on a cruise. A Case Study.

Dimitrios Mylonopoulos

Associate Professor
Technological Education Institute of Piraeus/Greece
Department of Tourism Industry Management
dimilon@teipir.gr

Polyxeni Moira

Professor
Technological Education Institute of Piraeus/Greece
Department of Tourism Industry Management
polmoira@teipir.gr

Spyridon Parthenis

Ministry of Culture and Tourism/
Greece
parthenis_s@mintour.gr

ABSTRACT

Cruising is an old leisure activity. Originally it was addressed to a few wealthy tourists. However, nowadays the features of cruising have changed and cruising has a wider and different group of consumers. Over the last years new activities have been developed on board cruise ships in an attempt of the cruise industry to attract new consumers. New products such as chartering a cruise ship by a company in the framework of an incentive cruise for the staff or the organization of an event, an educational programme or a conference on board a cruise ship. This paper explores the degree of the conference attendees' satisfaction from the Annual ISTTE Conference 2010 on board Carnival Cruise Line's 'Paradise', which departed from Long Beach, California and to what extent such initiatives can be successful.

KEY WORDS: Cruising, Cruise ship, Conference on board

1. Introduction

Coastal areas have attracted people since antiquity as they were the main field for their food-collecting activities such as fishing. In addition to being a survival field, coastal areas were an important destination for leisure travel. Sea touring is not a phenomenon of the modern era. It is historically proved that since antiquity there had been ships used for leisure. The most known was 'Syracusia', designed by Archimedes and built around 240 BC by Archias of Corinth on the orders of Hieron II of Syracuse. The ship was luxurious. It had 30 rooms, a temple of Venus, a library with a reading room and a garden (Antonopoulos, 1963: 45). Moreover, Cleopatra of Egypt owned a luxury yacht. It is said that the Ptolemeys had about 800 luxury yachts (Athinaios, 1979: 12), which can be considered as the forerunners of the modern yachts and tourist vessels.

During the Roman era, the Roman citizens used to visit in groups ancient Greek cities (e.g. Athens, Corinth, Rhodes) for relaxation or in order to attend various events, religious celebrations, with specially chartered ships (Antonopoulos, 1963: 78). Rich merchants from around the globe used to sail to Corinth in Greece in order to conduct business transactions and spend their holidays. At the classical era there was a famous

ancient saying: "Ou pantos plein es Korinthon", which translates as "Not everyone is able to go to Corinth", due to the expensive living standards that prevailed in the city. Roman emperors and patricians, the rich land owners, used to sail with luxury passenger vessels of *Victoriae* and *Orariae* type. The sea tourings of the Roman general and consul Germanicus in the Adriatic and the Ionian Sea as well as that of the Emperor Nero, who toured Greece and attended the Pythian, the Isthmian, the Nemean and the Olympic Games, were the most known (Athineos, 1979: 13).

In the 15th century Venice organized in a systematic way the group sea touring in order to carry pilgrims to the Holy Land. The interest of Venice in sea touring was so big that special rules for safe navigation were set up. During this period tourist businesses were established. The headquarters were in Venice while there were branches in all the big cities of Europe. Their aim was to gather travelers-pilgrims and carry them to the Holy Land (Lane, 1934: 8). In the 17th century, touring acquired a new form which combined leisure, exposure to both the cultural legacy of classical antiquity and Renaissance and historical research, especially through the Grand Tour of wealthy young Englishmen (Simopoulos, 1972: 44). During this period, group sea touring was abandoned and replaced by the sea touring of individuals or small groups, especially in the region of the Mediterranean Sea.

2. Cruising

Cruising combines passengers' leisure on board with calls to one or more cosmopolitan ports, satisfying thus their need to get to know new places and come in contact with different cultures (Mylonopoulos, 2004: 108-111). Cruising is a purely leisure activity. The idea of cruising, that is travelling by ship for leisure and not for transport reasons, is attributed to Arthur Anderson, a sailor from the Shetland Isles, one of the founders of Peninsular and Oriental Steam Navigation Company, which became known in the shipping industry as P & O. In 1835 Anderson suggested a cruise departing from England to the Faroe Islands and the coasts of Spain so that passengers could enjoy the sun during the winter (Gibson, 2006: 4). In 1844 P&O extended its cruises in the Mediterranean and over the next decades cruising also took place in other regions. In the 1860s the chartering and the management of ships for cruising was widespread (Boniface & Cooper 1996: 49). These cruises lasted long and the clientele was wealthy. Travelers had abundant time and money and traveled mainly for health reasons rather than for leisure. Cruising meant enjoying the trip rather than visiting the different ports of call (Mylonopoulos & Moira, 2005: 97).

The first cruise ships did not differ from passenger ships, regarding their construction and the provision of services. Due to seasonality and lack of customers, passenger ships often served as cruise ships. After the end of World War I the number of ships used in the cruise industry increased due to the change of the immigration policy of the United States. The US imposed strict limits to the immigrants' entry into the country (Georgantopoulos & Vlachos, 1997: 385). This resulted in the conversion of passenger ships to cruise ships so that the vessels remained active and the problem of seasonality was faced (Lundberg and Lundberg, 1993). In the 1930s there was an improvement in accommodations on board the leisure ships with the inclusion of individual baths. This was the case of the ship *Monarch of Bermuda* in 1933 (Starr, 1993: 176).

The new era for cruising started in the 1960s when the ship as a means of carrying passengers between the United States and Europe was replaced by airplane. In order to gain profit from passenger ships, ship owners converted them into cruise ships. However, there were problems, as these ships did not have ventilation systems, open spaces and other amenities for tourists. For instance, there was no ventilation on board

until the 1950s (Starr, 1993: 179). In the 1970s cruise ships started operating purely as a space of provision of tourist services in the Caribbean with clients from Northern America. Cruise ships were designed with open spaces and decks so that leisure and sport activities could take place on board (e.g. swimming pools, tennis) (Boniface & Cooper, 1996: 49). European companies, especially from Scandinavia, conducted cruise market surveys for the region of the Caribbean. In the early 1980s cruise ships were the focus of the tourism industry and new ships specially designed for cruises started to be built (Starr, 1993: 176). The 'aggressive' advertising campaigns but also some popular films and TV shows, such as the 'Love Boat', contributed to the success of this new trend and helped form a very attractive image for cruises (Wood, 2000: 349; Moira & Mylonopoulos, 2006: 31). This increase in demand for cruising encouraged the companies to build ships with bigger tonnage. Holland America Line adopted the name 'ocean liners' for these ships (Maxtone-Graham 2000: 47). In this generation of cruise liners there is a tendency for an increase in the number of outside cabins.

In the 1990s megaships with a carrying capacity of about 2,000 passengers were built; for example, *Sovereign of the Seas* (1987) formerly operated by Royal Caribbean International, *Monarch of the Seas* (1991), *Majesty of the Seas* (1992). These cruise liners used to sail seven-day Caribbean itineraries. *Sovereign of the Seas*, which was called 'floating mall', marked the change in the philosophy of cruising, from simple leisure travel to 'a self-sufficient, full vacation experience' (Foster, 1994: 141-142). In this generation of huge cruise liners the prevailing feature was luxury and high quality hotel services, such as accommodations, food, leisure, day and night activities and tours in the ports of call. In the 1990s the cruise market was one of the fastest growing sectors of the economy (Dickinson & Vladimir 1997: 37). There was a particular increase in the demand for cruising in the United Kingdom and the rest of Europe and later in the Asia-Pacific region. The growing rate of cruising, with an annual increase of 8% since 1988, had almost doubled compared with the total tourism activity (Economist, 1998: 14). According to the data from CLIA, PSA and GP Wild, in the 1990s the Northern America covered the two thirds of the world demand for cruising. The European market ranked second while the rest of the world shared a very small percentage.

Later, even though the total of the cruise passengers all over the world were 10.7 million in 2001 (Peisley, 2002), cruising was harshly affected by the terrorist attacks of 9/11 in the USA. The demand for cruising changed and it was limited to the US and Canada territorial waters (homeland cruising). Flying cruising was also restrained as the Americans preferred to drive to the home cruise port rather than fly. In 2007 about 9.57 million Americans went on a cruise. According to CLIA (2008), cruisers have above-average annual household income of 93,000 USD, average 46 years old, have a high level of educational attainment and consider cruising as a good way to sample destinations that they may wish to visit again on a land-based vacation.

In Europe there was an increase in cruising in the 2000s. A total of 225,586 jobs were generated in Europe thanks to the cruise industry while the European ports had 21.7 million cruise passengers in 2008. At the end of 2008 there were 42 cruise companies in Europe with a fleet of 129 ships and a carrying capacity of 116,000 passengers (G. P. Wild, 2009: 1). During this decade the demand for cruising more than doubled compared with the previous decade, i.e. it increased from 5.7 million to 14.4 million passengers. Over the same period the number of the Europeans who had been on a cruise all over the world more than quadrupled, i.e. from 1.7 million in 1998 it reached 4.4 million in 2008 (G. P. Wild, 2009: 3-4). The Europeans made 27% of

the total cruise passengers compared with 22% ten years before. The most popular country for cruising in Europe was Italy, which had more than five million passengers in its ports and particularly in Naples, Civitavecchia and Venice in 2008. Greece came second in terms of number of passengers in Europe. The Greek ports of Piraeus, Santorini, Rhodes and Mykonos had 4.3 million cruise passengers (G. P. Wild, 2009: 5-7). Spain ranked third with 3.6 million cruise passengers (with the inclusion of the Canary islands).

3. The research methodology

Modern cruise ships offer passengers sea, sun, leisure and services, which differentiate from the simple maritime transport on board a passenger ship (Mylonopoulos, 2004: 108). For many tourists the motives to go on a cruise are various such as security, social status, the friendly atmosphere but also the services provided (Cartwright & Baird, 1999). The dominant feature in cruising is the hotel function of the ship. Cruise ships offer services similar to those provided by hotels with qualified staff as in modern hotel units (e.g. hotel manager). What differs a cruise ship from a hotel is that due to its ability to sail it can move to different geographical regions so that it can any time meet the demand for accommodation. It is easily accessible and functions as 'home far from home' while at the same time it carries passengers to different ports of call/destinations (Gibson, 2006: 2).

Today there is a tendency for more and more ships of a big tonnage to be built with services that go beyond the conventional hotel function. The aim is to cover all the services provided by a luxury hotel-tourist complex (e.g. spas, golf courses, art rooms, theatres, business centres, cinemas). Modern cruise ships have become 'floating resorts'; for instance, *Queen Mary 2* built in 2004, has a tonnage of 150,000 gross tonnage and carries 3,090 passengers and 1,253 crew, *Independence of the Seas* and *Freedom of the Seas*, with a tonnage of 160,000, carries 3,634 passengers and 1,360 crew, *Genesis*, built in 2009, with a tonnage of 220,000, carries 6,400 passengers, *Oasis of the Seas*, with 220,000 gross tonnage and carries 5,400 passengers (Spencer-Brown, 2008).

The armchair adventurers (Foster, 1988:227) and the cruise ship as a floating seniors house which were the features of the cruise industry over the past decades have turned into "action cruising" and the cruise ship has turned into a multifunction space, marking the cruise industry in the early 21st century. Cruise lines have introduced innovative onboard amenities and facilities, including surfing pools, bowling alleys, rock-climbing walls, multiroom villas, multiple themed restaurants and expansive spas, health and fitness facilities. The question often asked in the past "how am I going to spend my time on board all day?" was replaced by the question "where shall I find some time for some rest?" (Starr, 1993: 185).

The development of the cruise industry has made cruising affordable to a range of social classes. There is no longer a standard profile for cruisers. From the rich and the famous to the family next door, all the strata of society can enjoy cruising nowadays. There is no longer the standard image that cruising is closely linked with the third age. It is a fact that in the past only the wealthy people and old people had the privilege to go on a cruise as they were the only ones who could afford it. Cruises at that time lasted for long, so a myth was created around them, which was maintained for many years through cinema and television. Cruises started becoming affordable to social classes with an average annual household income as short cruises were offered and customers could choose either fly-cruise or easy cruise. In addition to this, the carrying capacity of cruise ships increased. This resulted in the reduction of the median age of cruisers as almost half of the passengers are below 45 years old while

one third of them are below 35 years old (Lundberg and Lundberg, 1993). The huge success of James Cameron's film "Titanic" in 1997, starring Leonardo DiCaprio, contributed enormously to the increase in cruise bookings by young people (Major, 1998). According to CLIA data in August 2004, 34% of cruisers were between 35 and 54 years old. Only one out of four (25%) was a pensioner. Furthermore, three out of four cruisers were married (76%) while 16% of cruisers were accompanied by their children, below 18 years old.

Families are actually one of the target groups of cruise planners. By offering so many activities for children (e.g. table tennis, treasure hunting, bingo, Internet cafes), cruise ships are becoming the ideal places for the children's leisure and entertainment (Starr, 1993: 185). According to CLIA, one million children participated in cruises in 2003. Actually one of the rapidly growing segments of cruising concerns extended families. Modern cruise programmes combine services and amenities addressed to each of the members of a family, i.e. children, parents, grandparents. So there are activities specially tailored for adults, teenagers, seniors but also activities that encourage the participation of all members of the family at the same time.

A whole grid of professional activities has been developed in order to support the cruise industry. Travel agents have a very important position in this industry as 74% of cruise passengers book cruise vacations through travel agents (CLIA, 2008: 29). These travel agencies, scattered all over the world, specialize in selling cruise vacation packages, promote and advertise this tourist product in international special brochures and catalogues by paying very high fees.

4. Cruises and Conferences

Over the last years new activities on board cruise ships have been developed by the cruise industry so that it can attract young consumers. To this end, new products have been created such as the chartering of a cruise ship by a company which offers an incentive cruise to its staff or the organization of an event, and educational programme or a conference on board a cruise ship. This kind of cruises is promoted as suitable for corporate events, family reunions and other special occasions. Cruise liners offer the ideal balance between individual freedom and group proximity. The organization of an event while on cruise can contribute to the group spirit among the members of a company or a community (Hughes & Kroehler, 2007: 216-263). Modern cruise ships offer all kinds of amenities for the successful organization of a conference or an incentive trip such as luxurious facilities, special halls, full audiovisual equipment, restaurants, bars and leisure venues. They are also ideal for all family members, which is an extra incentive for conference attendees' to bring along members of their family. Moreover, a cruise ship is an ideal venue for conferences as conference attendees' cannot 'escape' the ship until the next port of call, so in some way they are 'obliged' to attend the conference.

According to the wording of WTO (1992, in Wootton & Stevens, 1995: 306), «business tourism denotes the activities of persons travelling to and staying in places outside their normal environment for the purposes of business.» The conference attendees' «motivation for travel may be primarily to attend the meeting, but this may be part of a wider itinerary of visits, including extended tours, or leisure interests» (Lawson, 1982: 298).

The world market of congress tourism is really huge. The number of congresses and conventions according to ICCA (2010) has had a significant increase worldwide (from 5,186 in 2000 to 7,634 in 2005 reaching 8,294 in 2009 with fluctuations in between.) Europe was the most popular destination in 2009 as it hosted 54.4% of the world congresses and conventions. However, its share is on the decrease over the last

decade while the popularity of the other regions (North America, Oceania, Africa, Asia, Middle East and Latin America) is on the increase (ICCA, 2010: 15). USA and Germany rank first as far as the organization of world congresses and conventions is concerned.

With regard to the size of the congress tourism market there is lack of reliable data. It is estimated that it varies from £900 million for the big congresses and conventions to £6 billion, smaller congresses and meetings included, in all kinds of facilities. Congresses and meetings of this kind are widely used for the promotion of some tourist destinations. In most European countries there is a Conventions and Visitors Bureau (CVB) which facilitates the organization of events of any kind (Mylonopoulos & Kontoudaki, 2011). Conference attendees' have a high social, professional, economic and scientific background. Surveys have shown that almost three quarters of them (72%) are usually accompanied by persons of their family or friend environment (Cotterell, 1994) and often have high consumption expenditure.

A lot of cruise companies promote the organization of conferences on board cruise ships (e.g. Royal Caribbean, Carnival Lines, Norwegian Cruise Lines and Celebrity Cruises¹). This kind of conferences gives the host country a prestige and has significant economic benefits.

5. Case study

5.1. The survey

A primary survey was carried out on board Carnival Cruise Line's *Paradise* in order to explore the degree of the conference attendees' satisfaction from the Annual Conference of the International Society of Travel and Tourism Educators (ISTTE), which was held on October 18-22. The theme of the conference was: «Education across the Waters: Expanding the Boundaries of Tourism and Hospitality». 106 conference attendees' participated in it. The itinerary of the cruise was Long Beach-Catalina Island-Ensenada/Mexico-Long Beach. A total of 50 structured questionnaires were distributed to participants on 21 October 2010 on the last day of the cruise during the farewell event. The response rate was 92% that is 46 questionnaires were returned.

5.2. Passengers' profile

As for the respondents' nationality, 13 people (28.3%) came from the US, 12 (26.1%) came from Europe, 10 (21.7%) came from Asia, one from Africa, one from Australia while there were six people of mixed nationality (e.g. American-Israeli). The full distribution by nationality can be seen at Table 1.

TABLE 1. Nationality of the respondents

<i>Nationality</i>	<i>Frequency</i>	<i>Percent</i>
USA	13	28.3
Europe	12	26.1
Asia	10	21.7
Africa	1	2.2
Australia	1	2.2
Other	6	13.0
Missing Value	3	6.5
<i>Total</i>	46	100.0

¹ <http://www.meetingsonships.com/default.asp?pid=46284&sid=13426>

34.8% of the respondents (16) were men and 65.2% (30) were women. The age groups of the respondents can be seen at Table 2.

TABLE 2. Age groups of the respondents

<i>AGE</i>	<i>Frequency</i>	<i>Percent</i>
20-30	9	19.6
31-40	13	28.3
41-50	13	28.3
51-60	8	17.4
61 up	2	4.3
Missing value	1	2.2
<i>Total</i>	46	100.0

The majority of the respondents, 25 people (56.5%) were married while 13 (28.3%) were single. Most of the respondents who replied that they had children were accompanied by them. The marital status of the respondents can be seen at Table 3.

TABLE 3. Marital status of the respondents

<i>Marital Status</i>	<i>Frequency</i>	<i>Percent</i>
Missing value	1	2.2
Married	26	56.5
Single	13	28.3
Separated	4	8.7
Widow(er)	2	4.3
<i>Total</i>	46	100.0

19 out of the total of 46 respondents (41.3%) said that they were accompanied in the cruise conference. Eight of them were accompanied by their spouse, four by their child/children and one by their spouse and child/children while five of them did not specify who accompanied them (Table 4).

TABLE 4. Conference attendees' accompanying persons

<i>Accompanying persons</i>	<i>Frequency</i>	<i>Percent</i>
YES	19	41.3
NO	27	58.7
<i>TOTAL</i>	46	100.0
<i>If yes, by:</i>	<i>Frequency</i>	<i>Percent</i>
Not answerable	27	58.7
Spouse	8	17.4
Child/Children	4	8.7
Other	5	10.9
Both spouse & child/children	1	2.2
Missing value	1	2.2
<i>TOTAL</i>	46	100.0

With regard to the occupation of the respondents, 25 (54.3%) were members of teaching staff at higher level educational institutions (universities/colleges), 12

(26.1%) were students while 9 (19.6%) did not specify their occupation. In the latter case the persons accompanying them were involved in the tourism industry.

TABLE 5. Occupation of the respondents

<u>Occupation</u>	<u>Frequency</u>	<u>Percent</u>
Member of teaching staff	25	54.3
Student	12	26.1
Other	9	19.6
<i>Total</i>	46	100.0

When asked about their status in the conference/cruise, 26 respondents (56.5%) said that they participated as speakers and 10 as delegates. (Table 6)

TABLE 6. Conference status of the respondents

	<i>Frequency</i>	<i>Percent</i>
As a speaker	26	56.5
As a delegate	10	21.7
Other	10	21.7
<i>Total</i>	46	100.0

5.3. Participation

Half of the respondents (50%) replied that they had also participated in past ISTTE conferences. Ten of them had participated once, three of them had participated four times and another three respondents twice. Moreover, three respondents had sixteen participations in the previous ISTTE conferences, which is probably explained by the fact that they are founding members of the Association. (Table 7)

TABLE 7. Participation of the respondents in past ISTTE conferences

	<i>Frequency</i>	<i>Percent</i>
N/A	23	50.0
1	10	21.7
2	3	6.5
3	1	2.2
4	3	6.5
5	1	2.2
6-10	1	2.2
16 and more	3	6.5
Missing	1	2.2
<i>Total</i>	46	100.0

Participants were also asked about whether they had already had a previous cruise experience. The majority of the respondents (60.9%) replied that they had. Five of them said that that had been on a cruise once while three of them had participated in a cruise at least seven times.

TABLE 8. Previous cruise experience of the respondents

	<i>Frequency</i>	<i>Percent</i>
N/A	28	60.9
1	5	10.9
2	1	2.2
3	1	2.2
4	3	6.5
5	3	6.5
6	1	2.2
7 and more	3	6.5
Missing	1	2.2
<i>Total</i>	46	100.0

However, for the overwhelming majority of the respondents that was the first time they had ever participated in a conference on board a cruise ship. Only one person answered that they had participated in a conference-cruise before.

TABLE 9. Is it the first time that you have participated in a conference on board a ship?

	<i>Frequency</i>	<i>Percent</i>
YES	44	95.7
NO	1	2.2
Missing	1	2.2
<i>Total</i>	46	100.0

Next, respondents were asked to rank their motives for their participation in the ISTTE conference-cruise (conference, cruise, experience, vacations) from 1 to 4. The option 'conference' ranked first (58.7%), followed by 'vacations' (17.4%) and 'cruise' (13%).

5.4. Satisfaction with the cruise

The participants in the survey were asked to rate the quality of the services during the conference. 37% of them thought the secretarial support was very good while 32.6% of them found it was excellent. Moreover, 43.5% of the respondents rated the quality of the conference equipment as very good. As for the organization of the conference, about one third of the respondents (37%) thought it was excellent while almost half of them (43.5%) rated it as very good. Furthermore, half of the respondents (50%) found the quality of the meals during the conference-cruise very good while a quarter of them (26.1%) rated it as excellent. The various events were rated as very good (41.3%) and excellent (34.8%) while the workshops were highly appreciated by the majority of the respondents (84.8%). Regarding the quality of the presentations it was rated excellent (37%) and very good (41.3%). Finally, a third of the respondents (32.6%) found the exhibition to be fair while another third (30.4%) thought it was very good.

As far as the elements composing the cruise experience are concerned, almost half of the respondents (45.7%) thought the cabins were very good, 30.4% found them excellent while about one third (30%) rated them as fair. Regarding the quality of the restaurants, about half of the interviewees (45.7%) rated them as very good while a quarter of them (26.1%) found them excellent. The quality of the bars was rated as very good and excellent by 47.8% and 21.7% of the respondents respectively. In addition to this, about one third of the interviewees (32.6%) rated the cruise leisure

venues as fair while 37% of them thought they were good. The general image of the cruise ship was rated as very good by a third of the respondents (32.6%) while a quarter of them (26.1%) thought it was excellent. The cruise ship staff was rated as excellent and very good by 43.5% and 47.8% of the respondents respectively. As for the choice of ports of call, 39.1% of the interviewees rated it as average while one third of them (32.6%) found it very good.

Finally, half of the respondents (52.2%) said they had been very satisfied with both the cruise and the cruise ship while 71.7% of them had also been very satisfied with the conference. Moreover, half of those surveyed said that they would definitely participate again in a conference on board a cruise ship.

6. Survey findings

The survey showed that 41.3% of the respondents were accompanied by one or more persons (family or friends). Half of the interviewees had participated in past ISTTE conferences while 60.9% of the respondents participated in a cruise for the first time. Only one person replied that they had participated in a conference on board a cruise ship in the past.

As for the motives for participation, the option 'conference' ranked first for 58.7% of the respondents while the options 'cruise' and 'vacations' ranked first for about one third of the respondents (30.4%). As for the conference secretarial services, one third of the interviewees (32.6%) thought it was excellent while 37% of the respondents rated it as very good. Moreover, the conference audiovisual equipment was rated as very good by 43.5% of the respondents while the overall conference organization was rated as excellent and very good by 37% and 43.5% of the respondents respectively. The different events on board the cruise ship were found to be very good and excellent by the majority of the respondents (76.1%).

39.3% of the respondents who participated in the cruise for the first time rated the secretarial support as very good while a third of them (35.7%) found it excellent. Moreover, almost half of them (46.4%) rated the audiovisual equipment as very good while 42.9% of them thought the overall organization of the conference was very good. More than half of the respondents (57.15%) rated the meals as very good while 28.6% of them found it was excellent.

As far as the cruise ship restaurants were concerned, 57.1% of those who were on a cruise for the first time (Group 1) rated them as very good while 29.4% of those who had been on a cruise before (Group 2) found them excellent while another 29.4% thought they were very good. Leisure activities were rated as very good (47.4%) and excellent and very good (23.5%) by the two groups of respondents respectively.

The cruise ship staff was rated as excellent by almost half of the respondents (57.1%) belonging to Group 1 and very good by almost two thirds (64.7%) of the respondents belonging to Group 2. In addition to this, ports of call were rated as excellent by 53.57% (Group 1) and 47.1% (Group 2) of the respondents respectively. About half (52.2%) of those who participated in the survey said they had been very satisfied with the cruise while more than two thirds of them (71.7%) replied they had been very satisfied with the conference. Almost half of the respondents (52.2%) replied that they would definitely participate again in a conference on board a cruise ship.

All in all, the majority of participants, with or without cruise experience, were satisfied with both the organization of the conference and their overall cruise experience.

7. Conclusion

Professional and scientific congresses attract a specialized audience, which is willing to go where they take place. Cruise ships, as a floating hotel with luxury services, is increasingly promoted as an important congress venue. Congress-cruise tourism is addressed to special interest groups and combines professional and scientific expertise with tourism. To this end, it seeks to adapt the tourist product to the needs of a congress/conference. This form of tourism has a large potential as it meets both conference attendees' and accompanying persons' needs, by offering a wide variety of experiences, a change of scenery, as the cruise ship calls at different ports, and familiarization with various cultures (when ports of call are found in a different country from that of the embarkation port).

Consequently, this market niche needs to be further explored through surveys among the members of the special interest groups participating in this form of tourism. This will enable the tourism industry professionals to meet the demands of this specialized target group.

REFERENCES

- Antonopoulos, N.K. (1963). *History of the Mercantile Marine*, Piraeus.
- Athineos, E. (1979). *Maritime Tour*, Athens. (in Greek)
- Boniface, B. & Cooper, C. (1996). *The Geography of Travel and Tourism*, 2nd edition, Oxford: Butterworth-Heinemann.
- Cartwright, R. & Baird, C. (1999). *The development and growth of the cruise industry*, Oxford: Butterworth-Heinemann.
- Cotterell, P. (1994). *Conferences: an organiser's guide*, London: Hodder and Stoughton.
- Cruise Lines International Association (2008). *Cruise Market Profile Study*. Retrieved from:
http://www.cruising.org/sites/default/files/pressroom/Market_Profile_2008.pdf,
 accessed on 10 March 2011
- Dickinson, B. & Vladimir, A. (1997). *Selling the Sea: An Inside Look at the Cruise Industry*, New York: Wiley.
- Foster, D. L. (1994). *First Class: An Introduction to Travel and Tourism*, 2nd edition, New York: McGraw-Hill.
- Foster, G. M. (1986). 'South Seas Cruise. A Case Study of a Short-lived Society', *Annals of Tourism Research*, 13 (2): 215-238.
- G.P. Wild (International) Limited and Business Research & Economic Advisors (2009). *Contribution of Cruise Tourism to the Economies of Europe 2008*, Prepared for The European Cruise Council Euroyards, May 2009.
- Georgantopoulos, E. & Vlachos, G. (1997). *Shipping Economics*. Piraeus: Jay & Jay Hellas. (in Greek)
- Gibson, Ph. (2009). *Cruise Operations Management*, Oxford: Butterworth-Heinemann.
- Hughes, M. & Kroehler, C. (2007). *Sociology*, Athens: Kritiki. (in Greek).
- International Congress and Convention Association (ICCA) (2010). *The International Association Meetings Market 2000-2009*. ICCA Statistics Report. August.
- Lane, F. C. (1934). *Venetian Ships and Shipbuilders of the Renaissance*, Baltimore.
- Lawson, F. R. (1982). 'Trends in business tourism management', *Tourism Management*, 3 (4): 298-302.
- Lundberg, D. E. & Lundberg, C. B. (1993). *International Travel and Tourism*, New York: John Wiley and Sons.
- Maxtone-Graham, J. (2000). *Liners to the Sun*, New York: Sheridan House.

- Moira, P. & Mylonopoulos, D. (2006). 'Cruising as a Tourist Service. A Sociological Approach', *e-Journal of Science and Technology*, Technological Educational Institute of Piraeus, 1 (2): 38-38.
- Mylonopoulos, D. & Moira, P. (2005). *Maritime Tourism*, Athens: Interbooks. (in Greek)
- Mylonopoulos, D. (2004). *Shipping: Notions, Sectors, Structures*, Athens: Stamoulis editions. (in Greek)
- Mylonopoulos, D. & Kontoudaki, E. (2011). *Communication Policy in the Public Tourism Sector. Strategies and Techniques in the EU Member States*, Athens: Nomiki Vivliothiki. (in Greek)
- Peisley, T. (2002). *The World Cruise Market Update*, Mintel International Group, Travel & Tourism Analysis. London.
- Passenger Shipping Association (PSA) (2003). *Annual Cruise Review (UK and Europe)*.
- Simopoulos, K. (1972). *Foreign travelers to Greece*, vol. A., pp. 333-1700.
- Spencer-Brown, C. (2008, July 15). «Cruise ships: how big is too big?» *Times Online*. Retrieved from: <http://www.timesonline.co.uk/tol/travel/news/article4332311.ece>, accessed on 10 March 2011.
- Starr, N. (1993). *Viewpoint. An Introduction to Travel, Tourism and Hospitality*, Boston MA: Houghton Mifflin Company.
- Survey Travel and Tourism Floating Fantasy. (1998, January 10). *The Economist*.
- Ward, D. (2009). *Complete Guide to Cruising and Cruise Ships 2009*, Berlitz, London.
- Wootton, G. & Stevens, T. (1995). 'Business tourism: a study of the market for hotel-based meetings and its contribution to Wales's tourism', *Tourism Management*, 16 (4): 305-313.

PRODUCT ATTRACTIVENESS OF KERALA HOUSE BOATS IN PROMOTING
TOURISM - A PERFORMANCE ANALYSIS

Robinet Jacob
Coordinator
School of Tourism Studies
Mahatma Gandhi University
Kottayam
Kerala, India

Abey Kuruville
Asst Professor
University of Wisconsin Parkside
Kenosha, WI, USA

Mahadevan P
Lecturer
School of Tourism Studies
Mahatma Gandhi University
Kottayam
Kerala, India

Asha Kuruville
Graduate Student
Masters in Tourism Management
Indira Gandhi National Open University
New Delhi, India

ABSTRACT

Kerala, a state on the southernmost tip of India, has recently placed a thrust on tourism as an important engine of growth, diversifying the industry significantly. One of the major areas is the 560 km waterway network and houseboats operated in them. This paper, a study on product attractiveness of house boats and its role in Kerala tourism, is based on primary data derived through a sample survey. An analysis of the structure and operations of houseboats was performed. Stakeholder perceptions were derived using two questionnaires – one for 50 houseboat operators, and the other for 200 tourists. A majority of houseboats have all the basic conveniences that western tourists would require and recent unsustainable trends like solid waste management practices were being corrected by stricter government control and initiatives. The customer survey revealed demographics of the tourist as well as the reach and brand management in the industry. While the majority of customers thought the basic needs were met, only a minority fully endorsed the boats for safety. The proliferation of facilities in the industry might have taken away from the authentic Kerala experience that was the reason for growth in this industry. More policy changes need to be in place to ensure the continued sustainable growth and development of this sector while maintaining its initial charm.

The social, ethical and safety issues associated with the proliferation of house boats also need to be addressed.

KEYWORDS: Kerala Tourism; Backwaters; Houseboats; Sustainable Tourism; *Green Palm*

INTRODUCTION

Kerala, a southern Indian state is situated between the Arabian Sea on the west and the Western Ghats towering 500 to 2700 meters on the east in only 1.18 percent of the total area of the country. Located in the North latitude between 8°18', and 12°48' and East longitude between 74°52' and 77°24', it occupies 38,863 sq.km. The coastline is about 580 kms long and the borders between 32 and 121 kms wide. A very ethnically and religiously diverse state, it is networked by 44 rivers and enjoys unique geographical features that have made it one of the most sought-after tourism destinations in Asia. An equitable climate, a long shoreline with serene beaches, tranquil stretches of backwaters, lush hill stations and exotic wildlife, waterfalls, sprawling plantations and paddy fields, Ayurvedic health holidays, enchanting art forms, magical festivals, historic and cultural monuments, exotic cuisine all offer a unique experience within a small bio-diverse area. The climate is tropical and the temperature varies from 18°C to 35°C. This politically conscious state, where power alternates between Left and Right parties, claims the highest literacy rate in India at 93.91%. The growth of population is the lowest among Indian states. Kerala has the highest sex ratio in the country, which increased from 1036 females/1000 males in 1991 to 1084 females/1000 males in 2010 (National Census report 2010). The state has the lowest infant mortality at 12 deaths per 1000 births. Thus Kerala ranks on top in human development indicators among all states.

The state was rated “One of the fifty destinations to be visited in one’s lifetime” by the National Geographic Channel (2004), ten best destinations by Conde Naste Traveler (2004), and of “three best destinations” by WTTC at the ‘Tourism for Tomorrow awards, 2006’ (Stark world, 2006). Tourism has emerged as one of the few economic alternatives for Kerala’s development, particularly with limited manufacturing prospects, agricultural and traditional sector issues, and uncertainties facing expatriate employment in the Persian Gulf (Pushpangadan, 2003). The economy has been growing at 7.8 percent since 2000-01. 58.8 percent of the state’s income comes from the service sector, attributed to success in tourism. The service sector engages 38% of the population with an annual increase of 10.2% (Kerala-Performance, Facts and Figures, 2007). Tourism industry which provides jobs to around 800,000 people is thus recognized as a very important sector and Industry status was granted in 1986.

Foreign tourist arrivals increased from 176,855 in 1996 to 598,929 in 2008. Domestic tourist arrivals crossed 75 lakhs in 2008, an increase of 14.28% over the previous year. Foreign exchange earnings went up from Rs. 196.38 crores in 1996 to Rs. 3066.52 crores in 2008. The total direct and indirect revenue from tourism has gone up to Rs. 13,130 crores during 2008 (DoT report, 2008). WTTC has predicted a tourism growth of 11.4% per annum in the next decade.

Product Diversification and Innovation

Kerala has given due importance to diversification of tourism products that included new products and destinations. Department of Tourism (DoT) and private entrepreneurs took up innovative marketing efforts coupled by a transparent quality-control system and sound eco-friendly practices. There was always an effort to attract high spending tourists to avoid mass tourism problems. Kerala's success in tourism is associated with the introduction of new experiences such as house boats, tree houses and ayurvedic rejuvenation. Many of the ancient traditional houses and mansions i.e, the "Nalukettu" and "Ettukettu" were refurbished to start Ayurvedic centers and heritage homes. Resort life represents local architecture and culture. The concept of homestays, festival tourism, plantation tourism, boat races etc. offers a variety of experiences to tourists in a small geographical area.

The above efforts have been the key to developing a brand image which helps it remain as a stand-alone tourism destination. Product endorsement by top magazines and websites boosted marketing efforts. In 2000, Kerala Tourism launched the Kerala Travel Mart (KTM), the first ever biannual international travel mart focusing on a single state that has now become a top rated tourism expo in the world (Stark world, 2006). Promotional efforts continued in the form of Malabar Travel Mart focusing the Malabar region and International Boat Show, the only such exhibition of this stature in South Asia. Direct marketing efforts, internet marketing, and road shows in selected international and domestic markets, promotional materials enhanced this effort. Kerala's planning efforts are based on a policy document called Tourism Vision 2025, which serves as a key for all tourism development activities for 25 years.

Backwaters of Kerala

Kerala offers a unique opportunity to experience its beautiful backwaters - a complex network of rivers, estuaries, lagoons, inland lakes and canals which provide a navigable inland waterway. This extensive network is 560 kms long and has 29 major lakes with a few permanent outlets to the sea. Vembanad Lake, the largest, covers 128 sqkm. The major backwaters are the Vembanad, Ashtamudi and Kayamkulam Lakes, and Backwaters of Kochi and Malabar. The predominant way to experience Kerala backwaters is a trip in Kerala houseboats (*Kettuvallam*). This cruise provides opportunity to view lush paddy fields, coconut palm groves, traditional villages, and unique flora and fauna of backwater life. Backwaters and rivers host boat races, the prominent ones being Nehru Trophy Boat Race, *Aaranmula* Boat Race, *Champakulam Moolam* Boat Race and several others. 100 to 120 oarsmen per boat compete with others to the tune of ancient songs representing cultural heritage, making the races one of the most electrifying socio-cultural events of the state. These products made their mark. The number of foreign and domestic tourist arrivals to backwater destinations was 77,000 and 285000 respectively in 2008 alone.

Study and Research Method

This study on product attractiveness of house boats and its role in Kerala tourism is based on Product Design Analysis and Operations Analysis, both completed through

secondary data and Stakeholder perceptions based on primary data derived through a sample survey using a structured questionnaire. Two sets of questionnaires were prepared for the survey – one for houseboat operators, the other for tourists. The survey was conducted among fifty houseboat operators in and around Kumarakom like Kumarakom jetty, Kavanattinkara, Cheppunkal and Vechur. A sample of 200 visitors including foreign and domestic tourists was surveyed for the tourist questionnaire and response from two tourists per day's trip was collected.

Product Design - History and Development of Houseboats

The '*Kettuvallam*' or houseboat/rice boat, a large floating structure with high loading carrying capacity was a part of Kerala's culture and heritage from time immemorial and could sail by harnessing wind. They were used to carry cargo. "*Kettu*" literally means to tie up and "*Vallam*" means "boats". The '*kettuvallam*' or 'boat with knots' was so called because the entire boat was held together with coir (coconut fiber) knots. Not one nail is used for construction of the boat. It is made of planks of jack-wood joined together with coir. This is then coated with a caustic black resin made from boiled cashew kernels. With careful maintenance, a *kettuvallam* can last for generations. A portion of the '*kettuvallam*' is covered with bamboo and coir to serve as a restroom and kitchen for the crew. The boats played a major role in the economic development of ancient Kerala, moving cargo and man and material from the every corner of otherwise unreachable areas. Fifty years ago, there were more than five thousand such boats in the backwaters of Kerala, mainly used for transporting goods. With the passage of time, motorized road, rail and air transportation scored over the slow country boat. With Kerala becoming an increasing popular destination for tourists, houseboats in Kerala got a new lease of life. Figures below show its evolution.



Traditional *Kettuvallam* used to move commodities



Evolution of the *Kettuvallam*, with some modifications



Current version of the Tourist Houseboats.

Fig 1: Evolution of the Kerala Houseboat

Structure

Each houseboat has a hull - a series of wooden planks, long cut and carved, tied together using coir fibers stuffed in between. Traditional boats are steered by two persons using oars in deep waters. Bamboo poles or 'punts' are used to propel in shallow areas. Bamboo beams on the sides are used as foot holds. A box of sand, a few bricks in interior facilitate cooking on lower racks, with storage on the upper ones. Food is stored in shelves and sleeping quarters are on the uppermost racks, which have the best ventilation and accessibility. Fresh water is stored in earthenware pots. Bamboo is used for the framework of the roof and splits of Bamboo are used for weaving mats for roofing. Bamboo poles are used for punting the boat.

Furnishing and Lighting

Interior furniture is either of cane or wood, floor carpeted with coir mat or wood panels. At night a hurricane lamp lights the interiors. Usually each one is hung from the ridge, one at front, one at rear and one or two for living spaces. For half a month moonlight reflected on water provides light. Modern houseboats use generator sets or solar power to provide lighting and other power requirements.

Specifications and Materials

Houseboats vary in size from about to 95 feet in length to 13 feet wide in the middle for standard one bedroom houseboats and 107 feet long and up to 19 feet wide for larger ones. Materials for construction are local and eco friendly - bamboo poles, coconut fiber ropes, bamboo mats, coir carpets etc. The wood used is "*Anjili*". Newer boats have fully furnished one to five bedrooms with sundeck, private balcony, kitchen and toilet with WC, air conditioning etc. In addition there is also a separate rest room. Some even have a small pool and Jacuzzi. Boats with upper deck are mostly used for day cruise and conferences. Houseboats are classified based on the number of bed rooms.

Parts of a Houseboat

- *Hull* – The Hull of houseboat is constructed from Anjili wood planking with Carvel joint construction fastened to Anjili frames. The superstructure is erected with marine plywood. A one bedroom has hull dimensions at 65 ft x 14.5 ft x 4.4 ft. The engine is a single 104 HP Cummins with 2:1 gear box.

- *Upper Structure:* This consists of an 8 ft fore-peak, 12x4 feet sundeck, 15x14 ft dining/lobby, 11x12 ft bedroom, 8x4 ft bathroom and an additional 4x3 ft one for crew. A kitchen 9x14 ft and an aft deck 8ft complete it. Sizes increase proportionally with increasing number of bedrooms.



Figure 2: Internal Structure.

Source: Professionals Leisure Holidays, Alappuzha

- *Main engine* – This consists of a single marine diesel engine, developing 104 HP @ 2200 RPM with 2:1 ratio Gearbox.
- *Control system* – Steering, accelerator and gear control system are provided at the fore end of the houseboat.
- *Stern Gear system* – One set stern – gear assembly comprising of brass stern-tube, stainless steel shaft, and MS intermediate shaft, inner and outer stuffing gland with cutlass rubber bushes will be provided.
- *Fuel tank* – One MS fabricated FRP lined 50 lit fuel tank.
- *Electrical Fittings* – Necessary essential fittings and appliances. A Diesel Generating set having adequate capacity to meet requirements for operation.
- *Water* – Fresh water tank having capacity of 800 liters.
- *Fire Fighting*– Necessary fire fighting application.

- *Life saving Equipment / Appliances (L.S.A)* – Required amount is kept in the boat for adults and children. (Minimum 4 for adults and 2 for children in a one bed room boat).
- *Air Conditioning Unit* – 1.10 Ton capacity reputed make, effective split type air-conditioning system will be provided in room.
- *Construction Materials* – The hull - Anjili wood frames. The rendering is fastened with non-ferrous rivets and fasteners excluding bamboo or traditional construction . Hull planking is fastened to the frames, by copper nails and rivets.
- *Flooring* – Coir carpets.
- *Dining Hall* – A dining table set and lobby recreation area with sofas to accommodate 4 to 8 persons.
- *Bed room* – The frame structure is built out of Anjili wood or similar and plywood paneled partitions and has following furnishings – each room has a double bed, extra mattress, pillows, bed spread, chairs a TV and DVD player.
- *Kitchen* – The kitchen has a gas stove with 3 burners, stainless sinks, exhaust fans, cabinets, water connection, insulated ice box, and a dinner set.
- *Toilet* – European style W.C with a washing Basin .The outlet of the W.C will be connected to the sump tank, and treated before pumping out. The bathroom has a European closet, mirror, towel holder, soap tray, napkin holder and shower.
- *Generator* – 2.8 K.V DG set.
- *Safety Tires* –Fastened all round the boat at deck level.

Operations Analysis

Licenses required: Each houseboat requires certain licenses/certificates for operation:

1. Cut Number – Equivalent to a vehicle number plate
2. CIB Number –Issued by the Office of Chief Inspector of Boats when applying for license.

Certificates Required:

- D Form –The license for fitness of the boat. It is issued by the Chief Inspector of Boats at Kochi. Per new rules, this has to be renewed every month.
- A Form – Issued by the Office of Inspector of Boats, it is the license to ply in the water. It is obtained after the D Form – also renewed every month.
- PCB – Pollution Control Board Certificate for implementing fuel emission control practices etc. It is issued for two years and has to be renewed.

Department of Tourism (DoT) has defined guidelines for classification of houseboats. This is mandatory and is based on an exhaustive list of conditions and facilities and quality of service in the houseboat. The boat is inspected by an expert committee of the Department upon submission of application and necessary fees. Two classes of certificates are issued

- Gold Star – For class one and

- Silver Star – For class two.

Houseboats ensuring eco friendly measures are awarded a certificate called ‘Green Palm’ by the DoT. The Kerala Inland Vessels Rules – 2010 specifies all major rules related to the plying of inland vessels in the water bodies of the state.

General Itinerary

Houseboats ply mainly in the backwaters of Vembanad, Kayamkulam and Ashtamudi in the districts of Alappuzha, Kottayam and Kollam. In general, at all places the usual houseboat package preferred by tourists is the 22 hour trip or overnight trip. The main features of these are: Check in Time: 11.30 AM / Check out Time: 9.30 AM (the next day). The *American Plan* (AP) includes a welcome drink, lunch, evening tea, dinner and breakfast next morning. Extra Bed cost Rs 500.00 – 750.00 (Sometimes complimentary).

No houseboat can ply after sunset. They are anchored at a shore. Air conditioning works from 8PM – 7AM as it has to get external power. If it does not work due to technical faults, the difference is usually refunded. The next preferred houseboat package is the day trip (4-5 hours until sunset). Guests are served welcome drink, lunch and evening tea with snacks. Few tourists prefer packages that last more than one night. Specially designed houseboat packages can include conference packages.

Menu

Traditional cuisine forms the most important part of the menu. Though based on fish and vegetables, the cuisine can vary depending on the clients’ requirements.

Welcome drink – Tender Coconut water.

Breakfast – Continental + South Indian dishes - dosa, idly with sambar and chutney, tea or coffee.

Lunch – Rice, Sambar, three vegetable dishes, fish fry, pickle, papad and sweets.

Evening Tea/Snacks – Tea with banana fry or other north Indian snacks

Dinner – Chappathy, Rice, Dal, Chicken curry, vegetables.

Vegetable and other consumables – Utmost care given to selection of vegetables, fish, chicken etc (fresh and seasonal vegetables are used and both fish and chicken are fresh).

Cooking oil – Refined Sunflower oil

Drinking water – Bottled branded mineral water (unlimited).

Crockery – Crockery and utensils are new and clean.

Preparation of food – Trained staff cooks food, serving it fresh.

Storage – Proper hygienic and safe storage facility for rice, vegetable, spices, oil etc.

Guests can also buy fresh prawn, crab, or any fish during their cruise from fishermen and the chef normally prepares it without any additional charge.

Staff

Staff members consist of a chef and two crew members. The chef doubles up as captain. The chef, who interacts with guests is the primary source of information. He explains the landscape, culture, tradition, local waterways and safety precautions. He is multilingual. Two crew members assist him – one stays in front and other at the back of the boat. They also serve as housekeeping staff. Per law, the crew must have necessary boat license and must be trained in life saving and first aid skills. The prevailing salary for all houseboat staff is Rs. 4500.00 basic per month and 125.00 per day on days of service. Firms having more than one boat have a supervising staff to assure guest satisfaction, ensure quality control and a person to transfer items required for the boat like fuel, kerosene, provisions etc. and so on. Such staff is paid a consolidated monthly salary. The houseboat industry therefore provides employment for several local people - each boat employing three persons directly and indirectly.

Security

Houseboats are well maintained with emphasis on safety and security of client. Backwaters are well-known for friendly and helpful local people. During the stay, guests get a chance to interact with them and share their experiences. Only guests and crew are allowed inside the boat and every houseboat is equipped with life buoy, life jackets, and back up support of ground staff 24 hours. Every houseboat has mobile phone, safe fuel storage facilities and a fire extinguisher. Rooms are also equipped with Mosquito nets, mosquito repellants etc. Houseboats also have first aid facilities and guests are informed of safety measures.

Cruise routes

Alappuzha cruise routes

The District Tourism Promotion Council (DTPC) – Alappuzha has developed a comprehensive table of rates for houseboats on seasonal basis. One terminal is located at Punnamada and another at Pallathuruthy. Alappuzha also has a wide range of routes and options for one, two and three night cruises. The *Alappuzha to Alappuzha cruise* is the most popular cruise preferred by most tourists. Additional ones charge extra ranging from Rs 500 to Rs 6000 depending on destinations.

Kumarakom cruise routes

Unlike Alappuzha, Kumarakom has limited number of canals and rivulets for cruise. Hence the most popular route is the vast and open Vembanad Lake. Almost all cruises here go around the charming island of Pathiramanal to Muhamma and return via

Tannermukkom *bund*. The three major boarding points in Kumarakom are Kumarakom jetty.

Kollam cruise routes

DTPC – Kollam is the only Government agency rendering backwater houseboat cruise packages in Kollam District. The houseboat packages are grouped into *Economy packages* – Round-trip cruise (11 AM – 5 PM) and *Gateway city packages* – that are between cities.

Houseboat is a fluctuating product and the rate varies depending on the demand and supply. The price increases from October – February with the highest rates during the Christmas–New Year week. From March – August, rates go down especially during the monsoon season.

Importance of Houseboats in Kerala Tourism

The importance of houseboats in the Kerala Tourism sector has been the topic of study of many research reports. All studies point to the uniqueness of this tourism product and its status as a prime product of ‘God’s Own Country’. Under the ‘*Final Report on 20 Year Perspective Plan for development of sustainable tourism for the State of Kerala*’ for Ministry of Tourism and Culture, Government of India prepared by TECS, backwaters of Kerala occupy third place next to heritage and beaches among foreign tourists and second position next to heritage among domestic tourists.

Table 1: Kerala Tourism Products -Various categories

Tourism product category	Domestic tourists - %	Foreign tourists - %
Heritage, culture and religion	65	40
Backwaters	15	20
Beaches	8	25
Hills and Hill stations	7	5
Forest and Wildlife	5	10

Source: ‘Final Report on 20 Year Perspective Plan for development of tourism for Kerala’ – TECS

Table 2: Kerala Tourism Features -Various categories

Features of Kerala	Total mean score	Domestic tourists – mean score	Foreign tourists – mean score
Natural beauty	4.51	4.57	4.47
Beaches	3.74	3.85	3.66
Backwaters	4.34	4.32	4.35
Tea gardens	4.03	4.28	3.80
Islands	3.78	3.97	3.62
Culture and Heritage	4.26	4.15	4.34
Palaces and Churches	3.82	3.86	3.79
Cuisine	4.04	3.82	4.21
Ayurveda	3.99	4.11	3.89
Wildlife and Birdlife	3.84	3.86	3.82
Climate	4.03	4.22	3.88
Safety	4.41	4.47	4.36
Hotels	4.17	4.30	4.06
Connectivity	4.30	4.37	4.25
Economical	4.25	4.29	4.22
Others	4.31	4.20	4.39

Source: 'Kerala's approach to Tourism Development – A case study' - CRISIL

The backwaters of Kerala averages a high mean score among the 'Features of Kerala' in the study 'Kerala's approach to Tourism Development – A case study' conducted by CRISIL for the Ministry of Tourism and Culture, Government of India.

Stakeholder Perceptions

Data Analysis

A sample of 200 visitors including foreign and domestic tourists was surveyed for the tourist questionnaire. The survey was conducted in 30 houseboats for five days and response from two tourists per day's trip was collected. The survey was conducted among fifty houseboat operators in and around Kumarakom like Kumarakom jetty, Kavanattinkara, Cheppunkal, Vechur, Tannermukkom, Muhamma, R Block etc. Survey findings are reported:

Houseboat Owners

60 percent of houseboat owners were proprietors, 24 percent were joint owners and 16% were companies. While a majority of houseboats did not have conference facilities, 36 percent of them, did. About 88 percent of the respondents reported owning boats that had air-conditioning while the remaining did not. This was very different from how they were just a few years ago, where almost none had any modern comforts. While all houseboats reported having western toilets, only 46 percent had hot water. This is also reflective of the general practice in Kerala of not using hot water for showering. Half of the boats reported having a shower cubicle. While a majority of the boats at 94% had an icebox, only 74 percent had a refrigerator and 78 percent had a water purifier. While a

majority of the owners reported purchasing the vegetables and farm products from shops, only 26 percent had purchased them from farmers. A majority of the houseboats at 88%, offered local culinary menus with a small percentage offering Continental food and an even smaller percentage offering Chinese cuisine. Safety features seemed to be adequate with respondents reporting that all boats carried a lifebuoy and fire bucket, about 90 percent carried life jackets and 84 percent carried a fire extinguisher. There were no specific trends in garbage disposal. 46% reported burning garbage, while 34% reported burying it. Only 14% reported leaving it for collection agencies and 6% reported actually throwing out garbage, which could be a disturbing trend. With regard to solid waste management, 76% used a septic tank, while 24% used chemical toilets. It was encouraging that none of the boats were letting solid waste enter the water. This could be because of stricter environment regulations and Government initiatives in the near past. It was interesting that a majority of boats took booking through agents (65%) and the remaining took direct booking from customers. They used travel agents and the internet as a primary distribution channels along with brochures. Tourists were mostly domestic at 68% and only about 1/3rd were foreign tourists. The number of guests per trip was evenly divided at 32% being 2 guests per trip, 26% between 2 and 5, and 24% between 5 and 10. Only 18% reported having more than 10 guests per trip. A majority of guests at 60% had a length of stay of one day, and 30% took a day trip. Only 2% of travelers stayed more than 2 days. For drinking water, 76% used bottled water and 24% used local water supply. However for the purposes of cooking, all boats used local supply of water. A majority of boats used LPG as their source of fuel. Only 10 each used Kerosene and electric energy. Regarding the number of operators/employees in each boat, 72% has three employees, 12 % had more than three and 16% had two employees per boat.

Customers

The second survey was administered to 200 tourists. Gender breakdown was 63% of males and the rest female. It was surprising that the majority of tourists were male for a product like the houseboat, but also consistent with a male dominated culture. 67% of the tourists were domestic or of Indian nationality, and 33% were foreign. 68% said that it was their first visit to Kerala. It seemed that the length of stay in Kerala was mostly for a period of 4 days to 1 week with at 55 percent. 25% and 20 % stayed for less than 4 days and more than one week respectively. Regarding information about the houseboats, 31% reported finding out about them through tour guides or brochures, while 26% discovered them through travel agents and tour operators. 22% found them on the internet and a minority of 16% found them through newspapers and an even smaller minority, through family and friends. A majority booked the houseboat through tour operators. On a scale of 1-5 for Very good, good, moderate, bad and very bad, it seemed that a majority at 55%, thought the food was either very good or good, 57% thought the drinking water was good or very good, and around the same percentage thought the same for rooms, hygiene, waste disposal mechanisms and service of the staff. Only 40% thought the same of safety measures, with 32% thinking it was moderate. Interestingly 33% of respondents thought that additional services were bad or very bad. Regarding the costs of renting a houseboat, 55% of respondents felt that the costs were either high or very high, and only 15% thought the costs were low or very low. 72% of tourists reported that they did not have to register their names and details at check-in. It was encouraging that 86.5% of respondents

said they received a safety briefing for the cruise, but 72% also reported not receiving any brochures or material on safety tips. A whopping 96% reported that there was no waste segregation into biodegradable and non degradable sections. 92% also thought that eco-friendly materials were used in the construction of the boat. 80% of the respondents felt they were satisfied with the cruise, with 41% saying they would return. 68% said they would recommend a houseboat trip to others. Regarding the drawbacks of backwater tourism, it seemed that less than 20% and closer to 10% reported issues like lack of parking, pestering by middlemen, communication skills of staff and lack of entertainment. Overall, it seemed to be a positive experience.

Discussion

Majority of the entrepreneurs/houseboat owners are local people and their contribution in the form of investment and entrepreneurship has helped the local economy substantially. This had a boosting impact on infrastructural facilities which are shared by the local population too with the arriving tourists. Results show that only 26% purchased products from the local farmers. Efforts to increase that number will not only help with increasing the local economic impact, but also keep the experience for the tourist, as local and genuine as possible. While only 6% reported throwing out garbage, 34% of owners reported burying it. As seen in the tourist survey, if there was no segregation of garbage into biodegradable and non biodegradable parts, then both of these could be a disturbing trend. Policy changes that affect such actions in the industry perhaps need to be enforced even more, although the Government can be credited with several new sustainable initiatives in the recent past.

For promotion efforts of back water tourism reveal for one that the length of stay which seems to one day can be increased by offering extended house boat cruise routes coupled with more attractions and onboard entertainment. House boats with small conference facilities can be promoted keeping in mind the requirements of corporate groups increasingly choosing Kerala as a destination. While it does seem that this is the route most likely taken, it is also necessary to ask whether more in-house entertainment and facilities will take away from the authentic Kerala experience of peace and quiet in the backwaters. Moreover, increased use of facilities and energy can be a far cry from the ancient lanterns that used to light these boats, again taking away from an authentic experience. Increased marketing efforts, however, are required in tourism generating countries to increase the share of foreign tourists that can bring increased revenue, and increased environmental awareness. House boat tours are a part of the total Kerala tourism experience. So development of house boat tours needs diversification and enrichment of the Kerala tourism products which are typically associated with health, adventure and culture.

Future work

Although a large body of literature exists in the form of reports and policy initiatives of the government on backwater tourism in Kerala, there is not much literature available in the form of scholarly articles. Kerala being a major player in the tourism industry of an emerging economy like India, has many implications in terms of growth and impact. A few areas have emerged as areas for study based on this paper. The house

boats which are a new product can be segmented based on facilities and the effects of such segmentation can be studied. The empowerment of local population and communities is an issue demanding further studies. Crowding of house boats in the Vembanad waters, which is a Ramsar site, has affected the marine environment in different ways which needs serious introspection. Another major area of study in backwater tourism is that the social, ethical and safety issues associated with the proliferation of house boats needs to be addressed. The authors welcome any sort of collaboration with scholars interested in the above areas.

REFERENCES

- Gibson, P. (2010), *Cruise Operations Management*, Butterworth Heinemann, Burlington
- Kamra, K. K. (2005), *Managing Tourist Destination*, Kanishka Publishers, New Delhi.
- Kerala- An authentic Handbook (2010), Public Relations Department, Government of Kerala
- Kerala-Performance, Facts and Figures (2007), Pearson Education, New Delhi.
- Mill, R. C. (2008), *Resorts- Management and Operation*, John Wiley & Sons, NJ
- Prasannakumar. (2010), *Marketing of Hospitality and Tourism Services*, Tata McGraw Hill, New Delhi
- Preliminary National Census Report (2010), Government of India.
- Pushpangadan, K. (2003), *Remittances, Consumption and economic Growth in Kerala*, Working paper 343, Centre for Development Studies, Kerala, India
- Stark Kerala (2006), Starkworld Publishing Ltd, Bangalore
- Tourist Statistics (2008, 2007, 2006), Department of Tourism, Government of Kerala. Retrieved from www.keralatourism.org accessed on 18 August 2011.

POSTCARDS AS A REFLECTION OF A DESTINATION IMAGE: AN EXAMPLE FROM BERLIN

Ady Milman
Department of Tourism, Events, and Attractions
Rosen College of Hospitality Management
University of Central Florida
Orlando, FL 32816-1450, USA

ABSTRACT

The study adopted a qualitative approach to assess the role of postcards in developing a destination image. Twenty five postcard racks were sampled in a variety of sales outlets in Berlin, using an observation and content photography techniques. The 150 postcards were analyzed and sorted according to the pictures and other iconic representations featured in the postcards using certain photographic typologies employed in previous research (e.g. Hunter, 2008). The findings revealed that unlike many other large metropolitan cities, Berlin had a unique representation in postcards; the postcards lacked human representation and presented a limited sample of its cultural and heritage attractions. Instead, the majority of the postcards featured cold war themes, as well as generic icons and legendary mascots of the city. The lack of a focus representation of contemporary Berlin in tourists' postcards may be explained by Berlin's historical, economic, political, and social background. Recommendations for developing more realistic images to be featured on postcards are discussed.

KEYWORDS: *Postcards, destination image, identity, cold war, icons, Berlin.*

INTRODUCTION

Destination management organizations (DMOs) and tourism suppliers are actively involved in developing, presenting and promoting images and identities of destinations in order to attract visitors and subsequently, increase market share (Dredge and Jenkins, 2003). Visual methods like TV advertising, billboards, picture postcards, slides, photographs in travel brochures, souvenir booklets, and travel magazines are vital in creating and communicating images of any destination. These have been used extensively to communicate the tourist experience and represent the destination to potential market segments (Albers & James, 1988).

Photographs are a powerful component of destination marketing and play a crucial role in the promotion of tourism destinations, working through a range of media (Garrod, 2009; Jenkins, 2003). Photography is a primary medium through which people relate to visual images and make their own interpretations. In some cases, photographed pictures replace the direct tourist experience as a primary source of knowledge (Albers & James, 1988).

Travelers send postcards to friends and relatives to validate their trip, either to share their travel experiences at the destination or to simply let significant others know that they are thinking of them. Sending a postcard is an act of reinforcement of popular perceptions of place and an insight into both past and present geographies (Kuhlken, 2007). Postcards are also symbols that sustain notions of “exoticism” and “authenticity” of destinations (Markwick, 2001).

From a commercial perspective, destinations and tourist suppliers appreciate the value of postcards as consumers purchase the advertisement medium and disseminate it at their own expense creating free publicity for the destination (Butler, 1990). The picture postcard is the most widely distributed and easily accessible souvenir that is available at multiple locations in any tourist destination (Albers & James, 1988; Markwick, 2001). Picture postcards not only represent destinations, but also communicate attributes, characteristics, concepts, values, and ideas (MacKay & Fesenmaier, 1997).

Despite of the continuous popularity of postcards, some argue that the tendency of sending postcards from vacation destinations is declining due to accessibility to alternative visual and vocal means of communication that travelers can use from their vacation destination. With the advance of electronic communication, new forms of postcards emerged, often referred to as e-cards (Attraction Management (editorial), 2006).

Then again, several studies confirmed the sustainability and popularity of postcards, both as souvenirs and as a mean of communications (Marplan Institute, 2007). Yüksel and Olcay’s (2007) empirical study revealed that 54.8% of the respondents sent postcards from their last holiday destination (Yüksel and Olcay, 2007).

Postcards show little sign of disappearing from popular culture. Given the sustainable role of postcards in promoting destinations, very few studies explored the reasoning and justification for selecting the images and messages portrayed on postcards offered for sale at destinations.

This exploratory qualitative study is an attempt to investigate the various images presented in postcards offered for sale in Berlin. The study will evaluate the various approaches in which postcards represent the destination as tourists’ evidence for their travel (Hillman, 2007). The study will aim to unveil the effect of postcards in developing a destination image and identity.

LITERATURE REVIEW

Postcard Research in the Context of Tourism and Travel

The role of postcards in the context of tourism and travel has been examined in the literature, mainly from political, cultural, sociological, anthropological, historical and economic perspectives. Most studies adopted a content analysis approach and investigated past and present representations of the destinations (Burns, 2004; Edwards, 1996; Mamiya, 1992).

Other sociological and anthropological studies addressed human representation in postcards and the messages they communicated. Cohen (2007) evaluated the transformation of the Santa Claus image from a wintry patron of children to a tourist in the tropical south (Cohen, 2007). Thurlow et al. (2005) studied the image of ethnic minorities in South Africa and Finland, and Mellinger (1994) examined photographic postcards of African Americans during the 1893-1917 period. Finally, Albers and James (1988) evaluated the relationships between tourism, ethnicity, and photography using a sample of postcards.

Another group of studies investigated the economic and commercial impact of producing postcards. Larsen's (2006) study of the Danish island of Bornholm concluded that "producing" and "consuming" a tourist destination through pictures may vary between tourists and commercial photographers (Larsen, 2006).

In addition, the literature also provides several theoretical contributions for classifying postcards. Cohen (1993), for example, suggested five dimensions for postcard analysis: beautiful, exotic, cute, comic, designed, and neutral images. Cohen's (2007) study of the Santa Claus theme on Thai postcards analyzed the well-known figure on three dimensions: the background environment featured on the post card, appearance of Santa Clause, and Santa's activities. Olson, McAlexander, and Roberts' (1986) study of vacation advertisements identified three main categories of pictorial images: natural landscapes and scenery, people involved in recreational activities, and manmade landmarks and buildings. Similar approach was adopted by Hashimoto and Telfer (2007) who studied souvenirs offered for sale in Niagara, Canada.

Postcard Research in the Context of Destination Image

A destination image is the sum of perceptual beliefs, ideas, and impressions based on information processed from a variety of sources over time (MacKay and Fesenmaier, 1997; Gartner, 1993). Image is perceived as a mental picture formed by a set of characteristics that define a destination and implements a strong influence on the tourist's behavior (Yüksel and Olcay, 2007; Beerli and Martin, 2004). Visual images are indeed a powerful component of tourist destination marketing and dominate all forms of tourism promotion, from travel brochures and television commercials to Internet web sites (Jenkins, 2003).

Image is also crucial in the consumer's choice process of destinations as tourists have limited information about the destination, especially if they had not visited it previously (Beerli and Martin, 2004). Since tourism activities are primarily experience-based – photographs, caricatures, or other symbolic images are crucial in communicating the destination's image to consumers (Mackay and Fesenmaier, 1997).

Several studies suggested that pictures are more easily recalled or recognized by consumers than words (Singh and Formica, 2006) and that advertising pictures had a positive effect on consumers' memories for product-relevant information (Lutz and Lutz, 1977) and that the effect of visuals was superior to texts on memory (Childers and

Houston, 1984). Yüksel and Olcay (2007) concluded that postcard-induced feelings about the tourist destination determine the degree to which the destination would be valued as a travel destination.

Other consumer behavior research suggested concluded that written text and visual images were not neutral, but rather communicated meanings “beyond any initial intended messages” (Small, Harris, and Wilson, 2008). Milman’s (2011) study of a Turkish resort destination concluded visual messages communicated in the postcards are not necessarily authentic and that a large proportion of the postcards offered for sale were classified as “refurbished reality, misleading, or fantasy postcards” (Milman, 2011).

Postcards may be regarded as an input source for representing a destination’s image, not only for remote recipients but also for tourists who visit the destination area. Browsing through a large number of postcards may develop, enhance, or even change tourists’ image of the destination just by being exposed to new features and messages that they have not been previously seen. Very few studies evaluated a substantial number of postcards in the analysis process.

It is estimated that millions of postcards are mailed from a single country with multiple tourist destinations (Yüksel and Olcay, 2007). Therefore, featuring and producing effective visual images of a destination on postcards should be a major area of concern for all constituencies involved in the development, production and sale of destination postcards. An analysis of a representative sample of postcards offered for sale at a destination would be beneficial to better understand the role of postcards in representing a destination image.

METHODOLOGY

Instrument Development

While the literature on destination image is quite extensive, it is necessary to expand the body of knowledge on the role of postcards in representing destinations, in particular the specific images portrayed on the postcards. The study aimed to discover information about the unknown “social world” of all stakeholders involved in the production and consumption of the postcard experience: photographers, producers, vendors, tourists, local residents, and any other stakeholders.

Since there is limited research on the implication of postcards on destination image, a qualitative approach was adopted to better understand the perception and interpretation of the reality featured on the postcards (Schwartz and Jacobs, 1979). While this method does not necessarily produce “truths, factual, and data based results,” it provides a source of insight and ideas that continuously take place (Wells, 1991).

The most widely held approach employed in postcard research was content analysis. Hunter and Suh (2007) employed content analysis in a pilot study that evaluated visual perceptions of the Dolhareubang, large mushroom-like statues found

on Jeju Island off the southern tip of Korea. Albers & James (1988, 1983) analyzed photographs of First Americans in the form of postcards. Markwick (2001) used a sample of 500 randomly collected postcards to assess symbolic meanings of Malta and Edwards (1996) analyzed 1500 postcards of Australian aboriginal representations collected over a two-year period.

This study also adopted a content analysis approach. The research also assumed a constructive viewpoint by examining what are the images or representations featured on the postcards, rather than the subjective perspectives of tourists or other buyers.

Sampling and Data Collection

There are three common sampling strategies in qualitative research: convenience sampling, judgment sampling, and theoretical sampling (Marshall, 1996). For the purpose of this study, a judgment sampling was adopted, where the researcher selected the most “productive sample” to answer the research questions (Marshall, 1996). A sample of postcards offered for sale in Berlin was evaluated and the pictures and other iconic representations of the tourist destination featured in the postcards were analyzed.

The data was collected during the summer all of 2009, using an observation technique coupled with camera photography of postcard racks in the city’s areas frequented by tourists. The study sampled 25 postcard racks and included 150 postcards. The research adopted a non-probability sampling, where the researcher collected, coded, and analyzed the data. This impacted the decision of what data to collect next (Glaser and Strauss, 1967; Ryan, 1995). The data collection process also employed opportunistic sampling by collecting postcards from postcard retail outlets where the vendors who provided permission to take pictures of the postcard racks and the individual postcards (Ryan, 1995).

While there was no control on subjects’ traffic, the postcards sampled in this study were displayed in high passage areas of the city’s tourist attractions. It was assumed that the quality of display to potential buyers and consumer access to the postcards was comparable in all locations.

Qualitative Data Analysis

The postcards were analyzed and sorted according to the pictures and other iconic representations featured on the postcards. The first round of analysis assessed the level of realism or authenticity displayed in the pictures. The postcards were individually listed and classified according to the Berlin’s attractions and other authentic items featured in the pictures. More specifically, the analysis identified which postcards featured landmarks, people, plants, water sources, animals or other realistic and non-realistic symbols featured on the postcards. Photographs or caricatures of people featured on the postcards were then classified according to gender, estimated age, crowd type (single, couple, family, friends) or national origin (Small, Harris, and Wilson, 2008).

The second round of analysis adopted Hunter's (2008) typology of photographic representations of tourism pictures. The postcards were independently listed and categorized according to space and level of subjects (people) featured in the pictures. The analysis aimed to determine the presence of certain concepts, messages and other images aimed to be communicated in the postcards.

The Study's Setting

Berlin is located in the northeast of Germany with a population of about 3.5 million. Approximately one third of the city's area is covered by woodland, parks and waterways (About Berlin, 2011). Berlin was successively the capital of the Kingdom of Prussia (1701–1918), the German Empire (1871–1918), the Weimar Republic (1919–1933) and the Third Reich (1933–1945) (Modern History Sourcebook, 2011).

During the 1920s, Berlin was the third largest municipality in the world (Hake, 2008). After World War II, the city was divided; East Berlin became the capital of East Germany while West Berlin became a West German exclave, surrounded by the Berlin Wall (1961–1989). Following Germany's reunification in 1990, the city regained its status as the capital of Germany (Germany information, 2011).

The number of visitors to Berlin has increased steadily in the past decade. In 2010, 9,051,430 visitors arrived in Berlin, an increase of 9.5%, compared to the previous year. Most of the visitors were from Germany (59.1%), and the remainders were international visitors (30.3% European and 9.2% overseas visitors) (Berlin Tourismus & Kongress GmbH, 2011). In 2010, the city hotels hosted 20.8 million room nights, an increase of 10.2% compared to the previous year. The top overnight stays in were generated by German, Italian, and British tourists. Tourists from the Netherlands, Spain, the USA and Denmark followed (Berlin Tourismus & Kongress GmbH, 2011).

FINDINGS

The Postcards' Display Methods

The observation revealed that Berlin postcards offered for sale were part of the tourist souvenir portfolio and were readily available for purchase. The largest selection and the best prices were offered by small souvenir shops or kiosk vendors. Other commercial outlets included hotels, market stalls, outdoor displays near souvenir and book stores, or other tourist establishments. In many cases, identical postcards were featured by the different shopping outlets.

There were two types of postcard displays: (a) Rectangular displays where all postcards could be browsed at one time and (Figures 1) and (b) Traditional circular postcard racks, where postcards were arranged in a circle display and shoppers could browse the postcards while moving the rack from side to side (Figure 2).

In some cases, the price tag on top of the postcard rack pointed out to an intense competition in the postcard market. This could also be a dormant message to potential buyers that there was no need for verbal communication in the purchasing process and that buyers should buy the postcards and leave. Furthermore, some vendors offered “packages” where a certain number of postcards were offered for sale for a reduced price. Some vendors offered five postcards for one Euro, probably guessing that the postcards could be sold both as souvenirs and postal material to friends and relatives.

Figure 1: Berlin Postcard Rack



Figure 2: Berlin Postcard Rack



Postcards' Themes and their Frequency on the Display Racks

The postcards were divided into three major groups. The first group featured realistic, true and authentic photographs of Berlin. Some photographs enhanced the city's identity by superimposing the name “Berlin” on some pictures (Figure 3). However, only a small proportion of the 150 postcards sampled were part of this group.

The second group of postcards represented iconic images of Berlin. The postcards featured primarily bears (Figure 4), Berlin's famous pedestrian traffic lights, and Currywurst, a local sausage popular among local residents. The third group included generic or nonspecific postcards, featuring the name Berlin in different designs, as well as caricatures and other nonspecific images of the city (Figures 5 and 6). The majority of the postcards represented images were from these two groups.

Figure 3: Realistic Photograph of Berlin



Figure 5: Generic or Non-specific postcards of Berlin



Figure 4: Iconic Photograph of Berlin



Figure 6: Generic or Non-specific Postcards of Berlin



Postcards' Content and their Meaning

Based on Hunter's (2008) typology of touristic photographic representation, Berlin, unlike many other large metropolitan cities, was distinctively represented in its postcards. A content analysis of the pictures generated the following observations:

First, review of the postcard sample pointed out that none of the pictures portrayed humans. More specifically, Berlin's postcards did not portray the three groups of humans in Hunter's typology: tourists, hosts or combination of tourists and hosts (Hunter, 2008). This is not the case in other destinations, including major metropolitan cities in Germany like Munich, where humans were featured in postcards (Figure 7).

Second, the postcards did not present any "natural" or "cultivated landscapes" (Hunter, 2008). According to Hunter (2008), natural landscapes are open spaces that feature "pure and unspoiled mountains, oceans, beaches, forests, lakes, wild animals, fields or sky." Cultivated landscapes are "open spaces that feature the beauty of nature as pruned, gardened or otherwise altered" (Hunter, 2008).

This findings is surprising, given the fact the Berlin is home to one of the second largest urban park in Germany. Once a hunting ground, the *Tiergarten* is covering over 210 hectares (520 acres) and is popular among local residents and tourists. Yet, the Tiergarten was not featured in any postcard sampled. It was even more surprising that none of the numerous tourist attractions located in the park like the zoological park, Siegessäule, Kaiser-Wilhelm-Gedächtniskirche (Berlin.de, 2011).

Third, Berlin postcards displayed heritage and material culture (Hunter, 2008). The pictures presented “all situations where a specifically ethnic and unique history has made itself evident” including pictures of ancient ruins, arts, carvings and relics or their reproductions, temples and shrines and landmarks and cityscapes (alleys and streets) that have typically been gentrified into sites (Hunter, 2008).

The pictures representing material culture were divided into two major groups: (1) Contemporary Berlin and (2) Cold War Berlin. While Hunter (2008) includes in this photographic category “ethnic peoples and their costumes and lifestyles”, as mentioned earlier, in the case of Berlin - no humans (tourists, hosts, or both) were featured in the material culture postcards.

Contemporary Berlin postcards included pictures that demonstrated current snapshots of attractions of various historical and material cultural heritage such as The Reichstag, The Brandenburg Tor or the Kaiser Wilhelm Memorial Church. A sample of these postcards is presented in Figures 8-11. In some instances, several of Berlin’s tourist attractions were presented on a single postcard (Figure 12).

Cold War postcards were either reproduction of old historical pictures and symbols associated with the Cold War. Checkpoint Charlie, one of the ultimate symbols of the Cold War was a dominant representation, but other pictures were also featured. It is interesting to mention that a large proportion of the cold war theme were symbols of signs and documentation from that era (Figures 13-17).

Fourth, the majority of Berlin’s postcards were not a representation of the city’ attractions. These postcards will be classified as generic or neutral images (Cohen, 1993) and include postcards depicting Berlin’s name in various designs (Figures 5, 18 and 19).

Figure 7: Humans in Munich's Postcard



Figure 10: Berlin Tourist Attraction



Figure 8: Berlin Tourist Attraction

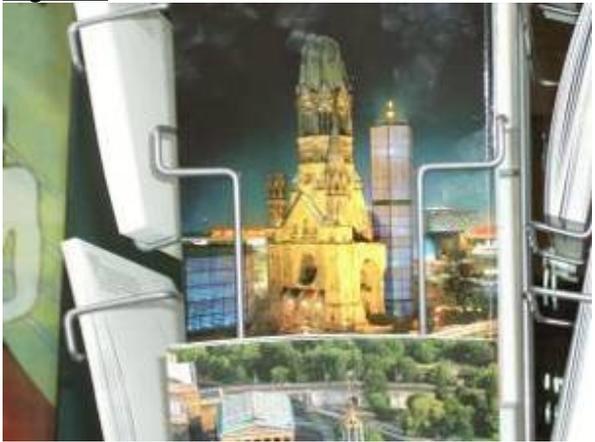


Figure 11: Berlin Tourist Attraction

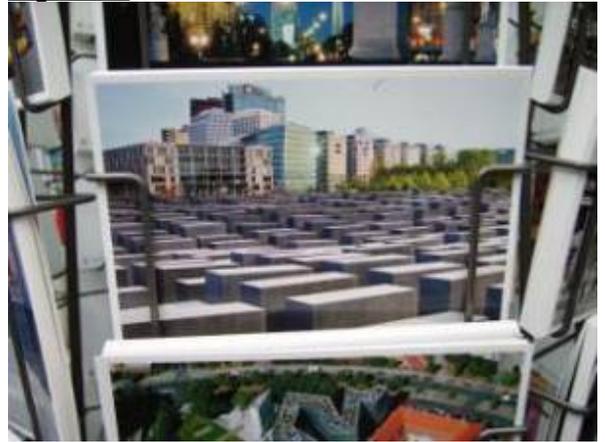


Figure 9: Berlin Tourist Attraction

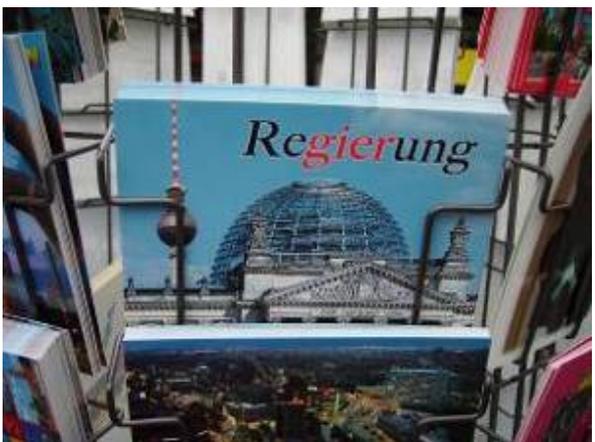


Figure 12: Berlin Tourist Attraction (multiple features)



Figure 13: Berlin Cold War



Figure 16: Berlin Cold War
(Documentation memorabilia)



Figure 14: Berlin Cold War (pictorial)



Figure 17: Berlin Cold War
(Documentation memorabilia)

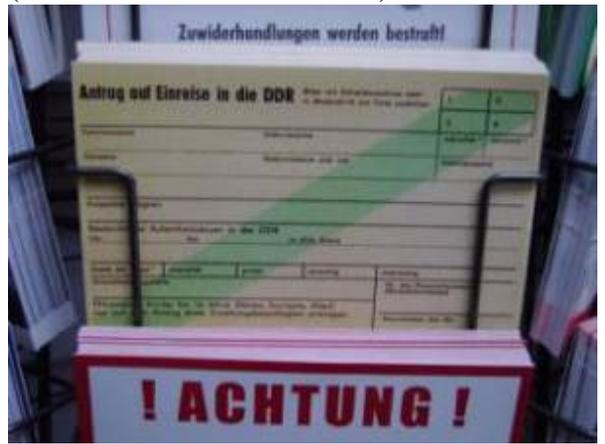


Figure 15: Berlin Cold War (pictorial)



Figure 18: Generic Berlin



Figure 19: Generic Berlin



Fifth, a large proportion of the postcards featured pop culture icons associated with Berlin. These symbols were informally accepted within the mainstream of the Berlin culture, more likely by hosts than tourists. Three dominant icons emerged from the content analysis: Bears, a pedestrian traffic light, and a local popular sausage.

The bears presented on the postcards were divided into four categories: (1) authentic bears (2) art showcase of bears (3) authentic bears superimposed over Berlin's attractions and (4) caricatures of bears (Figures 20-23). The bear has been a symbol for the city of for more than 700 years. It was first used on official correspondence in 1280 and is still part of the city's coat of arms. There is no historical evidence why the bear was chosen as the city "mascot" but some speculate that the German word for it "Bär" is quite close to the sound of the word Berlin (Virtual Tourist, 2011). However, the over representation of bears on the postcards was neither realistic nor authentic, as some of the bears were not indigenous to Berlin.

Figure 20: Berlin bear icon



Figure 21: Berlin bear icon



Figure 22: Berlin bear icon superimposed on an attraction in the background



Figure 23: Berlin bear icon (caricature)



Another attempt to develop an identity to the city was through Berlin's best known post-unification symbols: a pedestrian traffic light in the form of a little man known as Ampelmann (traffic light man). Today, postcards, key chains, shirts, and other souvenir items bearing traffic light man are sold citywide. The East Berlin Ampelmann was created in 1961 by traffic psychologist Karl Peglau. He theorized that people would respond better to the traffic signals if they were presented by a friendly character, instead of meaningless colored lights (Ampelmann, 2011) (Figures 25-25).

A third noticeable Berlin icon featured on the postcards was the Currywurst, a part of Berlin's fast food culture. It is a cooked hot dog cut into sections and covered with ketchup mixed with curry powder. According to the Berlin legend, the Currywurst sauce was invented in 1949 by Herta Heuwer who started experimenting with the ingredients out of sheer boredom while waiting for customers at her sausage stall (Associated Content, 2011) (Figures 26-27).

These examples of popular culture icons were widely distributed among the Berlin postcard portfolio and could be classified as "cute" or "comic" images (Cohen, 1993). The icons were initially adopted as an accepted pop culture of Berlin by its hosts, but through postcards and other souvenirs, the popular culture items have been shifted to tourists as well as a commercial culture, mass produced for mass consumption.

Figure 24: Berlin Ampelmann (traffic light man)



Figure 25: Berlin Ampelmann (traffic light man) variation



Figure 26: Berlin Currywurst



Figure 27: Berlin Currywurst and French Champagne



Discussion:

Berlin is among several tourist destinations that were transformed from a hostile border site to an appealing tourist destination. The geopolitical changes have influenced the development of its tourist infrastructure and the presentation of its attractions, as well as impacted the development of its image and perceived tourist identity (Gelbman and Dallen, 2010).

In former border destinations, unique attractions have been developed and offered acknowledgment and observation points associated with the heritage of the closed border (Gelbman and Dallen, 2010). Unlike major European metropolis, Berlin provides a different visitor experience by blending the legacy of World War II and the former East and West. The unique past of Berlin has prompted the development a postcard industry featuring images and other items associated with the cold war and the post cold war era. It is interesting to mention that the history portrayed in the pictures goes back as far as the cold war and not beyond. There is no reference to the Third Reich or any previous

regime that Berlin played a major political, social and economic role in.

For over three decades, the Wall made Berlin the ultimate border city, the place where the Iron Curtain went from metaphor to reality. It came to symbolize Berlin the way the Eiffel Tower stands for Paris and the Empire State Building represents New York. Today, the Berlin Wall is almost absent from the city. However, the Wall not only represents the Cold War conflict, but also its continuous controversy, primarily in its role as an 'unintended' monument (Saunders, 2009). There is no doubt that the Wall will always dominate people's minds, so "the Wall became inseparable from the city's identity" (Ladd, 1997). Therefore, the Cold War is over represented in the Berlin postcard collection and continues to contribute to the city's image.

But the major finding of the Berlin postcard content analysis is that Berlin lacks a unique and clear pictorial identity. The majority of the postcards do not represent its touristic sites, museums, parks, and heritage attractions but rather offer an over representations of generic icons (postcards that have no pictures featuring exclusively the name Berlin in different designs) or popular culture icons not necessarily recognized by tourists. This attempt to communicate a new identity of Berlin is over spilling to derivatives that far off and foreign to Berlin like polar bears, panda bears, or bear fiberglass sculptures. The combination of Champagne (perhaps rather than beer) with the Currywurst also creates a confusing message regarding its authenticity.

The search for identity was a challenge for Berlin long before the present time. After Prussia had been absorbed in 1871 by the German Empire, Berlin has risen to be the capital of Germany and became a sophisticated metropolitan area (Molnar, 2010). However, some argue that Berlin never became a source of identity for the German people, and somehow remaining "without a firm shape or definition – an unfinished capital in the middle of an unfinished nation" (Engert, 1985).

At the turn of the twenty-first century, Berlin is still lagging behind European cities like London, Paris or Vienna. It continued struggling to compete in economic terms even with German regional centers like Stuttgart or Düsseldorf (Krätke, 2004). Since the reunification, Berlin experienced increasing urban economic downturn, a continuous psychological and socioeconomic East–West partition, and the absence of economic benefits deriving from the return of the German government to the city (Krätke, 2004). These historical, economic, political, and social influences may explain why Berlin is very unique in its attempt to develop an identity through tourist postcards and perhaps turn into generic icons or popular culture as an alternative.

CONCLUSIONS

Photographs are considered vital to create and communicate a destination image (Kelly and Fesenmaier, 1997), and the produced images represent traditions of reality and reflect certain relationships in the destination's social structure (Morgan and Pritchard, 1998). In the past several decades, various studies investigated tourism's pictorial media like brochures, postcards, travel guides and other modes of advertising. This study was

an addition to this body of literature and provided a preliminary analysis to better understand and to classify the various features displayed on destination postcards and to assess their potential impact in representing an destination image. The goal of the study was to assess the physical and figurative role of photographs, symbols, icons, caricatures, and other images featured on the postcards.

The analysis concluded that the majority of the postcards offered for sale in Berlin did not feature a realistic or authentic representation of the destination (Milman, 2011). Most of the postcards were representing a vague view of contemporary Berlin, with no clear communication of the city's identity. Instead, the majority of the postcards presented images of the past and attempted to adopt several icons and mascots as part of the city's undefined popular culture. These ambiguous multiple meanings may yield an unclear and confusing representation of the destination for tourists, excursionists, and potential recipients of the postcards.

The messages communicated by postcards' images might be complex and comprehensive and may require methodical "unpacking" to reveal and understand the messages (Markwick, 2001). With the flashback to the Cold War and the newly rebuilt Berlin, the postcards represented sequential snapshots of both the city's setting and society's value changes over time. Contemporary postcards communicate information about trends and cultural shifts and have also been used as vehicles for transmission of new ideas and of local artistic styles of expression (Kuhlken, 2007).

The qualitative approach used in this study to examine a variety of features displayed on destination postcards may have some weaknesses. First, although attempts were made to sample postcards at the city's various geographical areas, not all Berlin postcards available for sale were sampled, observed, photographed, or analyzed. Second, the research methodology was subjective and may cause some bias in the interpretation of the facts, information, and messages displayed in the postcards analyzed. Finally, the interpretation of the postcards may vary from one stakeholder to another. The variation may be associated with socio demographic characteristics of the buyers and recipients, as well as their cultural and psychological background.

The implications of this study may suggest that postcards are still a popular sale item by many vendors at emerging tourist destinations, both as souvenirs and postal and greeting cards. While the present postcards available for sale may provide cognitive satisfaction for the tourists and economic value for the vendors, decision makers in city's public and private tourism sectors should consider enhancing the image of Berlin as a tourist destination through postcards and creating a more focused identity. Furthermore, as tourists' motivations and needs become more sophisticated and complex, consumers may demand the production of postcards with photographs and images that will expose more of the intimate and even controversial realities of the destination's local life (Markwick, 2001).

To enhance a destination's image, it is necessary that local authorities, tourism industry leaders and operators work together to develop unique images of the destination.

Their input should also be coordinated with all groups involved in the production, selling, and buying of postcards. Tourism marketing organizations should take into consideration the authenticity of the images featured on the destination's postcards to represent the destination in a more realistic way.

Finally, this exploratory study will allow us to develop future research propositions in an attempt to understand whether destination postcards are indeed produced to endorse the "real" or "true" experiences of tourists. Postcard analysis may also yield research agendas regarding the reasoning for postcard producers to feature one image or another on the destination postcards.

REFERNCES

- Albers, P. C., and W. R. James (1988). Travel Photography: A Methodological Approach." *Annals of Tourism Research*. 15 (1): 134-58.
- Albers P. and James W. (1983). Tourism and the changing photographic image of the Great Lakes Indians. *Annals of Tourism Research*. 10 (1): 123-148.
- Ampelmann (2011). Retrieved on 3/19/2011 from:
<http://www.ampelmann.de/html/verkehrssicherheit.html>
- Associated Content (2011). Retrieved on 3/19/2011 from:
http://www.associatedcontent.com/article/10098/currywurst_berlins_contribution_to.html
- Attraction Management (editorial) (2006). Video Postcards. *Attraction Management*. 11(3): 79.
- Berli, Asunción and Martín, J.D. Josefa D. (2004). Tourists' characteristics and the perceived image of tourist destinations: a quantitative analysis - a case study of Lanzarote, Spain. *Tourism Management*. 25 (5): 623-636.
- Berlin.de (2011). Retrieved on 3/19/2011 from:
<http://www.berlin.de/orte/sehenswuerdigkeiten/tiergarten/index.en.php>
- About Berlin (2011). Retrieved on 3/19/2011 from: <http://www.about-berlin.org/fastfacts.htm>
- Berlin Tourismus & Kongress GmbH (Visit Berlin) (2011). Retrieved on 3/19/2011 from:
<http://press.visitberlin.de/en/article/tourism-statistics>
- Burns, P. (2004). Six Postcards from Arabia: A Visual Discourse of Colonial Travels in the Orient. *Tourist Studies*. 4 (3): 255-75.

- Butler, R. (1990). The influence of the media in shaping international tourist patterns. *Tourism Recreation Research*. 15: 46-53.
- Childers, T. Y. and Houston, M. J. (1984). Conditions for a picture-superiority effect on consumer memory. *Journal of Consumer Research*. 11(2): 643-655.
- Cohen, E. (2007). From Benefactor to Tourist: Santa on Cards from Thailand. *Annals of Tourism Research*. 34(3): 690-708.
- Cohen, E. (1993). Mitigating the stereotype of stereotype in *Tourism Research: Critique and Challenges*. Pearce D.G. and R.W. Butler (eds). London and New York: Routledge.
- Dredge, Dianne and Jenkins, John (2003). Destination place identity and regional tourism policy. *Tourism Geographies*. 5(40): 383-407.
- Edwards E. (1996). Postcards: Greetings from another world. In: T. Selwyn (editor). *The tourist image: Myths and myth making in tourism*. Wiley: New York: 197–222.
- Engert, J. (1985). Berlin between East and West: lessons for a confused world. In: R.L. Merritt and A.J. Merritt, Editors, *Living with the Wall. West Berlin, 1961–1985*. Durham: Duke University Press.
- Garrod, Brian (2009). Understanding the Relationship between Tourism Destination Imagery and Tourist Photography. *Journal of Travel Research*. 47(3): 346-358.
- Gelbman Alon and Dallen, J. Timothy (2010). From hostile boundaries to tourist attractions. *Images. Current Issues in Tourism*. 13(3): 239-259.
- Germany information (2011). Retrieved on 3/19/2011 from: <http://www.germany.info/>
- Glaser, B. G. and Strauss A.L. (1967). *The Discovery of Grounded Theory: Strategies for Qualitative Research*. Hawthorne, N.Y.: Aldine Transaction
- Hammer, Joshua (2009). A night to remember. *Forbes* (Nov 2009): 108-113.
- Hashimoto, A. and Telfer, D. J. (2007). Geographical Representations Embedded within Souvenirs in Niagara: The Case of Geographically Displaced Authenticity. *Tourism Geographies*. 9(2): 191-217.
- Hillman, W. (2007). Travel Authenticated? Postcards, Tourist Brochures, and Travel Photography. *Tourism Analysis*. 12(3): 135-148.
- Hughes, G. (1995) Authenticity in tourism. *Annals of Tourism Research* 22(4): 781-803.
- Hunter, W. C. (2008). A typology of photographic representations for tourism: Depictions of groomed spaces. *Tourism Management*. 29(2): 354-365.

- Hunter, W. C., Y. K. Suh (2007). Multimethod research on destination image perception: Jeju standing stones. *Tourism Management*, 28(1), 130–139.
- Jenkins O. (2003). Photography and Travel Brochures: The Circle of Representation. *Tourism Geography*. 5 (3): 305-328.
- Kelly J. M. and Fesenmaier D. R. (1997). Pictorial element of destination in image formation. *Annals of Tourism Research*. 24 (3): 537-565
- Krätke (2004). City of talents? Berlin's regional economy, socio-spatial fabric and 'worst practice' urban governance. *International Journal of Urban and Regional Research*. 28 (3): 511–529.
- Kuhlken R. (2007). Postcards. *in St. James Encyclopedia of Pop Culture*. Retrieved on 3/25/11 from: http://findarticles.com/p/articles/mi_g1epc/is_tov/ai_2419100980.
- Ladd B. (1997). *The Ghosts of Berlin. Confronting German History in the Urban Landscape*. Chicago: University of Chicago Press.
- Larsen, J. (2006). Picturing Bornholm: Producing and Consuming a Tourist Place through Picturing Practices. *Scandinavian Journal of Hospitality and Tourism*. 6(2): 75-94.
- Lutz, K. A. and Lutz, R. J. (1977). The effects of interactive imagery and learning: Application to advertising. *Journal of Applied Psychology*. 62(4): 493-498.
- Mamiya, C. J. (1992). Greetings from Paradise: The Representation of Hawaiian Culture in Postcards. *Journal of Communication Inquiry*. 16 (1): 86-101.
- Modern History Sourcebook. (2011). Retrieved on 3/19/2011 from: <http://www.fordham.edu/halsall/mod/modsbook.html>
- Saunders, Anna (2009). Remembering Cold War Division: Wall Remnants and Border Monuments in Berlin. *Journal of Contemporary European Studies*. 17 (1): 9-19.
- MacKay, K.J. and Fesenmaier, D.R. (1997). Pictorial Element of Destination in Image Formation. *Annals of Tourism Research*. 24 (3): 537-565.
- Markwick, M. (2001). Postcards from Malta: Image, Consumption, Context. *Annals of Tourism Research*. 28 (2): 417-439.
- Marshall, M. N. (1996). Sampling for Qualitative Research. *Family Practice*. 13(6): 522-525.
- Marplan Institute (2007). Wetter super, Essen toll – Postkarte statt SMS. Retrieved on 3/25/11 from Welt on Line:

- http://www.welt.de/reise/article1207136/Wetter_super_Essen_toll_Postkartestatt_MS.html?nr=1&pbpnr=0
- Mellinger, W. M. (1994). Toward a Critical Analysis of Tourism Representations [Photographic Postcards of African Americans from the South]. *Annals of Tourism Research*. 21(4): 756.
- Milman, Ady (2011). The Symbolic Role of Postcards in Representing a Destination Image: The Case of Alanya, Turkey. *International Journal of Hospitality and Tourism Administration*. 12 (2).
- Molnar, Virag (2010). The Cultural Production of Locality: Reclaiming the 'European City' in Post-Wall Berlin. *International Journal of Urban & Regional Research*. 34(2): 281-309.
- Morgan, N. and Pritchard, A. (1998). *Tourism Promotion and Power: Creating Images, Creating Identities*. Chichester: John Wiley and Sons.
- Okech, R. N. (2007). Effective Utilization of Human Resources in Kenya: Case of Tourism Entrepreneurial Opportunities. *Journal of Human Resources in Hospitality and Tourism*. 6(2): 43-57.
- Olson, J., McAlexander, J., and Roberts S. (1986). The Impact of the Visual Content of Advertisements upon the Perceived Vacation Experience. *In* Benoy W. J., Moutinho, L, and
- Vernon, I. R. (1986). *Tourism Services Marketing: Advances in Theory and Practice*. Proceedings of the Special Conference on Tourism Services Marketing. Cleveland State University, Marketing Department, Academy of Marketing Science.
- Ryan, C. (1995). *Researching Tourist Satisfaction*. New York: Routledge.
- Schwartz, H. and Jacobs, J. (1979). *Qualitative Sociology: A Method to the Madness*. New York: The Free Press.
- Small, J., Harris, C., and Wilson, E. (2008). A discourse analysis of in-flight magazines: the "social sorting" of airline travelers? *Journal of Tourism and Cultural Change*, 6(1): 17-38.
- Singh, N. and Formica, S. (2006). Level of Congruency in Photographic Representations of Destination Marketing Organizations' Websites and Brochures. *Journal of Hospitality and Leisure Marketing*, 15(3): 71-86.
- Thurlow, C. Jaworski, A., Ylänne-McEwen, V. (2005). Half-Hearted Tokens of Transparent Love"? "Ethnic" Postcards and the Visual Mediation of Host - Tourist Communication. *Tourism Culture and Communication*. 5(2): 93-104.

Wells, S. (1991). Wet towels and whetted appetites or a wet blanket: The role of analysis in qualitative research. *Journal of the Market Research Society*. 33 (1): 39-44.

Yüksel, Atila and Akgül, Olcay (2007). Postcards as affective image makers: An idle agent in destination marketing. *Tourism Management*. 28(3): 714-725.

Tourism Destination Competitiveness: A regional comparison

**Kudzayi Maumbe
Recreation, Parks and Tourism Resources
West Virginia University, USA**

ABSTRACT

This paper analyzes destination competitiveness of regions based on the data from the 2008/2009 World Economic Forum (WEF) Travel and Tourism Competitiveness reports. Regional competitiveness is analyzed based on the overall competitiveness Index; the three travel and tourism sub-indexes and the fourteen travel and tourism pillars of the WEF travel and tourism competitiveness model. Results showed significant regional differences in all the three sub-indexes and twelve of the fourteen pillars. North America and Europe are the most competitive regions overall, followed by the Middle East, Asia Pacific, Central and South America and Africa in that order. Price competitiveness, North America and Europe's greatest competitive weakness is the other regions' great competitive strength.

KEYWORDS: Regional destination competitiveness, Tourism competitiveness

INTRODUCTION

Travel and Tourism is the world's single largest industry and employer and its importance both as a foreign currency earner and as a tool for economic development has been documented. According to UNWTO (2011) global international arrivals reached 935 million in 2010, representing 7% year-on-year growth. Tourism receipts reached US\$919 billion in 2010 up from US\$851 billion in 2009. Europe with 471 million international arrivals in 2010 is the leading international destination followed by Asia Pacific with 204 million international arrives during the same period. The other regions including: Americas, Middle East and Africa each received 150 million, 60 million and 49 million international arrivals respectively. With receipts of \$411 billion, Europe also leads in tourism receipts followed by Asia Pacific (\$203 billion), Americas (\$166 billion), Middle East (\$42 billion) and Africa (\$29 billion). While Africa is the second largest continent in the world, it still lags behind all the other regions, in both international tourist arrivals and receipts.

Along with the increasing economic importance of and growth in global tourism, come increasing competition and pressure among destinations to make theirs the global destination of choice. In this age of immense global competition it's no longer enough to just sell the tourism product, it is important that destinations get a clear knowledge and understanding of their comparative and competitive strengths and weaknesses in relation to competing destinations around the world

The objective of this paper is to assess and compare regional tourism destination competitiveness based on the World Economic Forum (WEF) destination competitiveness model. The paper focuses on different regions' competitive strengths, weaknesses and drivers. The data used in this study were obtained from the World Economic Forum's travel and tourism competitiveness reports.

Study objectives and questions

The overall objective of this study was to assess and compare regional destination competitiveness using the World Economic Forum (WEF) data and answer the following questions:

- What are the competitiveness driving forces behind the different regions?
- What are the most competitive regional destinations in the world?
- What are the competitiveness challenges for the regions?
- What are the key competitiveness weaknesses and strengths for the regions?

LITERATURE REVIEW

Destination Competitiveness

Destination competitiveness is increasingly getting important for tourism success worldwide (Enright & Newton, 2004). Ritchie and Crouch's (2003) proposed a destination competitiveness and sustainability model that assesses destination competitiveness under five broad categories including: Supporting factors and resources; core resources and attractors; destination management; destination policy, planning and development; and qualifying and amplifying determinants.

Supporting factors and resources form the basis of a competitive destination and are necessary for the attainment of the proceeding stages. Supporting factors include elements such as infrastructure, accessibility, political will and hospitality. The core

resources and attractions are the natural and created resources that attract visitors to the destination. These include physiography and climate, mix of activities, superstructure, entertainment, culture and history among others.

Destination management is the critical stage of the destination competitiveness model for a couple reasons. First, it's the section that destination managers have most control over. Second, it is the stage that links the supporting factors and core resources with the qualifying factors. Destination management functions to enhance the appeal of the core resources, strengthen the effectiveness of the supporting structures and adapt to the challenges imposed by the qualifying factors (Ritchie & Crouch, 2003). Destination policy, planning and development factors ensure the destination achieves both its tourism and development goals.

Qualifying factors define the scale, limit or potential of a destination hence its overall competitiveness by filtering the influence of the other preceding groups of factors (Ritchie & Crouch, 2003). Factors in this group include location, dependencies, safety and cost. Everything else being equal destinations that are closer to the main source markets, are safer and offer the best value for money will be more competitive.

In their study on the assessment of Hong Kong's destination competitiveness Enright and Newton (2004) used importance performance analysis (IPA) to test Ritchie and Crouch's model as well as to determine the factors that had the most impact on destination competitiveness between Ritchie and Crouch's (2003) core resources and attractors and generic business factors in relation to other competing destinations. Enright and Newton (2004) interviewed tourism service provider instead of tourists. They based this decision on the assumption that tourists are better positioned to evaluate the normal attractor components of the destination, but less likely to know about the business-related components included in their study. The study findings showed a differentiation between core factors and business related factors. Business-related factors were seen to be just as or more important than attractors in destination competitiveness. They concluded that tourism competitiveness should, therefore, be considered within a broader context of generic competitiveness.

Kozak and Rimmington (1999) used a different approach, interviewing visitors instead of service providers in assessing the qualitative elements of destination competitiveness of Turkey by British tourists. Their decision was based on the fact that consumers are an obvious source of external ideas and can be used to benchmark destination performance in relation to other competing destinations. Kozak and Rimmington (1999) also advocate for the use of hard data such as tourist arrivals and tourism income to measure destination competitiveness in relation to other destinations. They were able to identify Turkey's competitive areas including hospitality, value for money, weather, safety and security in relation to a set of other competing destinations.

Formica (2002) assesses destination attractiveness through both quantitative analysis of actual visitation, expenditure and length of stay and qualitatively by assessing perceived attraction generated by a region or destination. Unlike Enright and Newton (2004), Formica uses attractors as the basis for destination attractiveness and advocates for the use of tourists as they are the ultimate judges of destination attractiveness. The main problem with using tourists alone in evaluating a destination's competitiveness is that tourists are humans and their perceptions are affected by several factors including personal and cultural beliefs and can be influenced and/or distorted by promotional

material (Milman & Pizam, 1995). Nyberg (1995) argues that evaluation of destination attractiveness including both experts and visitors have the highest degree of accuracy.

Formica (2002) proposed a six-step destination attractiveness framework for use by destination managers and researchers in assessing destination's attractiveness including: Definition of region under investigation; measuring the unit area; inventorying the resources of the region; grouping the resources into attraction factors; evaluation of the attractions; presentation of the results in a geographical fashion. While Formica's (2002) framework prescribes the method to assess destination attractiveness, it concentrates mainly on the core attractors of the destination and is silent on the other destination competitiveness attributes including business-related attributes as identified by Enright and Newton (2004) and policy and regulatory issues identified by Ritchie and Crouch (2003).

Uysal, Chen and Williams (2000) assessed the state of Virginia's regional competitiveness in relation to nine other surrounding destinations. They used a perceptual map illustrating similarities and differences in how the ten states were rated on a set of 48 destination attributes. Uysal et al. (2000) interviewed travellers to Virginia and competing destinations in the region including: Maryland, Washington D. C., Pennsylvania, New York, North Carolina, South Carolina, Georgia, Florida and West Virginia. Their findings revealed that Virginia competes with Pennsylvania, North Carolina and West Virginia on natural features and competes with Pennsylvania, South Carolina and Georgia on historical and cultural resources.

Several other studies have been identified usually covering either one or a couple issues related to destination competitiveness. Cracolici, Nijkamp and Rietveld (2008) used Ritchie & Crouch's (2003) basic model of destination competitiveness, but looked at destination's technical efficiency from a tourist's perspective. Kozak (2002) used the benchmarking approach to identify performance gaps between two tourism destinations of Mallorca and Turkey. Nishaal & Guntur (2005) conducted a more comprehensive study assessing destination competitiveness of 200 countries through use of tourism indicators including price, openness, technology, infrastructure, human tourism, social development, and environment. Some studies have focused on tourism niche sector competitiveness such as conventions (Lee & Josiam, 2004) while others have focused on one subject such as price competitiveness (Dwyer, Forsyth & Rao, 2000) or destination image (Hsu, Wolfe, & Kang, 2004).

This study is based on the World Economic Forum (WEF) destination competitiveness model (refer to Figure 1) because the data for the study is based on this model. The WEF assesses destination (nations') tourism competitiveness based on an Index derived from three sub-indexes further broken down into fourteen pillars. The scores of the pillars are based on a seven point scale determined through an assessment of several key indicators. The model utilized by the WEF is presented in Figure 1 below:

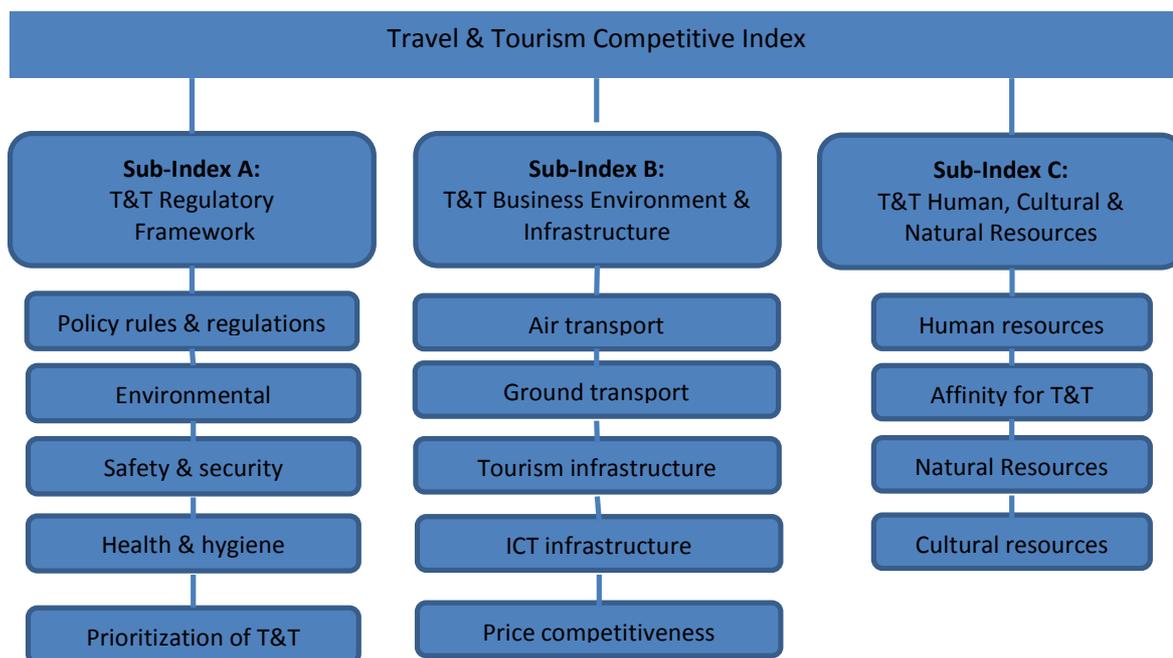


Figure 1: WEF destination competitiveness model
(Source: World Economic Forum (WEF), 2009)

The travel and tourism regulatory framework sub-index captures policy related elements. The business environment and infrastructure sub-index deals with elements of business and hard infrastructure while the human, cultural and natural resources sub-index captures the softer human, cultural and natural elements of the destinations (WEF, 2009).

METHODS

This study utilized secondary data from the World Economic Forum (WEF) travel and tourism competitiveness reports. The data includes competitiveness scores of: the overall 2008 and 2009 Travel and Tourism (T&T) competitiveness index; the three sub-indexes; the 14 pillars identified in the WEF model (refer to Figure 2). The scores are on a seven point scale with seven being the highest score each destination can achieve for each attribute.

Data were captured in SPSS and analyzed to address specific objectives and answer the stated research questions. Analysis includes descriptive, mean comparisons and Analysis of Variance (ANOVA).

RESULTS AND DISCUSSION

Descriptives

There were a total of 133 destinations that were divided into six different regions including: Europe, Central and South America, North America Middle East, Africa and Asia Pacific. Europe had the most (42) countries in the sample followed by Africa (31) and Asia Pacific (25) as shown in Table 1 below:

Table 1: Number of destinations in each region

Region	Frequency	Percent
Europe	42	31.6
Central & South America	22	16.5
Middle East	9	6.8
Africa	31	23.3
Asia Pacific	25	18.8
North America	4	3.0
Total	133	100.0

The overall average 2009 travel and tourism competitiveness score was 4.08 up from 4.07 in 2008. North America had the highest overall competitiveness scores for both 2008 and 2009. It also had the highest scores for the three sub-indexes (Refer to Table 2). Africa was the least competitive region overall for both years as well as across the three sub-indexes as illustrated in Table 2 below. The overall competitiveness scores ranged from a low of 2.52 to 5.68 in 2009 and 2.48 to 5.63 in 2008.

Table 2: Regional descriptive statistics for 2008/2009 overall competitiveness and 2009 sub-index scores

Region		2009 Overall score	2008 Overall score	T&T Regulatory framework	T&T Business environment and infrastructure	T&T human, cultural and natural resources
Europe	Mean	4.5988	4.5886	5.1788	4.2736	4.3443
	Std. Dev.	.58895	.60737	.50370	.81323	.59031
	Minimum	3.44	3.45	4.11	2.75	3.25
	Maximum	5.68	5.63	6.01	5.49	5.54
Central & South America	Mean	3.8727	3.8882	4.3386	3.2950	3.9841
	Std. Dev.	.39364	.38707	.51177	.49990	.47521
	Minimum	3.16	3.24	3.33	2.44	3.28
	Maximum	4.77	4.77	5.47	4.62	5.40
Middle East	Mean	4.1656	4.0600	4.7067	4.0600	3.7344
	Std. Dev.	.35868	.37786	.49887	.52216	.30278
	Minimum	3.63	3.58	3.87	3.20	3.16
	Maximum	4.57	4.51	5.16	4.79	4.16
Africa	Mean	3.4152	3.4082	3.9465	2.8065	3.4926
	Std. Dev.	.44009	.45497	.60163	.49098	.34734
	Minimum	2.52	2.48	2.83	1.93	2.66
	Maximum	4.43	4.41	5.38	4.04	4.17
Asia Pacific	Mean	4.0832	4.0129	4.4784	3.6552	4.1164
	Std. Dev.	.68114	.70516	.70716	.91309	.64753
	Minimum	3.02	2.93	3.16	2.49	3.11
	Maximum	5.24	5.34	5.93	5.25	5.42
North America	Mean	4.7900	4.7650	4.8600	4.6475	4.8600
	Std. Dev.	.58918	.58683	.45292	.90537	.83419
	Minimum	4.27	4.18	4.34	3.66	3.71
	Maximum	5.32	5.28	5.41	5.47	5.67
Total	Mean	4.0823	4.0744	4.5794	3.6503	4.0176
	Std. Dev.	.69916	.70581	.73273	.91660	.62999
	Minimum	2.52	2.48	2.83	1.93	2.66
	Maximum	5.68	5.63	6.01	5.49	5.67

*The mean scores are out of a possible maximum of 7

Examination of the regional scores on each of the pillars shows each region's competitive drivers and weaknesses (refer to Table 3). Health and hygiene is Europe's biggest strength with a score of 6.1 out of a possible seven, followed by safety and security (5.61). Europe's weaknesses include natural resources (3.06), air transport infrastructure (3.80) and cultural resources (3.91).

Though much lower than Europe's, Central and South America's competitive driver is human resources (4.95) followed by price competitiveness (4.92). Central and South America's weakness is its cultural resources (2.23). The Middle East's strengths are its human resources (5.24) and price competitiveness (5.18). Cultural (2.06) and natural resources (2.71) are the Middle East's major weaknesses. Asia Pacific region's strengths are its human resources (5.13) and price competitiveness (5.04), while its main weaknesses are tourism infrastructure (2.65) and cultural resources (2.98). Africa's competitive drivers are safety security (4.78) affinity for travel and tourism (4.77) and

price competitiveness (4.76). However, the African region has several weaknesses, some of which include: cultural resources (1.61), ICT infrastructure (1.91), tourism infrastructure (1.95) and air transport infrastructure (2.47). North America on the other hand, has several competitive drivers the best of which include: human resources (5.59), air transport infrastructure (5.36), policy rules and regulations (5.15) and health and hygiene (5.02) among others. North America's greatest weakness is price competitiveness (4.23), but even that is not too much of a weakness as it is above the average score of 3.5 (Table 3).

Table 3: Regional competitiveness scores on the fourteen pillars

<i>Pillar/Region</i>	<i>Europe</i>	<i>C. & S. America</i>	<i>M. East</i>	<i>Asia/ Pacific</i>	<i>Africa</i>	<i>North America</i>
Policy rules	4.72	4.22	4.53	4.37	3.89	5.15
Environmental sustainability	4.97	4.38	3.97	4.21	4.53	4.61
Safety & Security	5.62	4.59	5.84	4.84	4.79	4.63
Health & hygiene	6.10	4.26	4.81	4.35	2.49	5.02
Prioritization of tourism	4.47	4.28	4.38	4.62	4.05	4.89
Air transport	3.80	2.97	3.78	3.52	2.47	5.36
Ground transport	4.42	2.98	4.06	3.97	2.95	4.50
Tourism infrastructure	4.92	2.81	3.86	2.65	1.95	4.98
ICT infrastructure	4.22	2.77	3.41	3.09	1.91	4.17
Price competitiveness	3.98	4.92	5.18	5.04	4.76	4.23
Human resources	5.38	4.95	5.24	5.13	4.12	5.59
Affinity for travel & tourism	5.02	4.73	4.93	4.75	4.77	4.68
Natural resources	3.06	4.03	2.71	3.60	3.46	4.66
Cultural resources	3.91	2.23	2.06	2.98	1.62	4.51

*The mean scores are out of a possible maximum of 7

ANOVA

Analysis of Variance with post-hoc pair-wise comparisons was conducted to test for significant regional differences on the sub-indexes and the 14 pillars under each sub-index. Each of the three sub-indexes and its related pillars were analyzed separately.

Sub-index A: Travel and Tourism Regulatory framework

Results showed significant regional differences exist in travel and tourism regulatory framework, as well as in all but one of the five pillars under the regulatory framework sub-index. Prioritization of travel and tourism was the only pillar for which no significant regional differences were noted among the six regions, implying that all regions equally prioritize travel and tourism as a sector. The five pillars under the regulatory framework sub-index include:

- Policy rules and regulations
- Environmental sustainability
- Safety and security
- Health and hygiene
- Prioritization of travel and tourism

Africa is the least competitive region on sub-index A, scoring significantly lower than most of the other regions. Significant regional differences in travel and tourism regulatory framework existed between: Europe and Central and South America; Europe

and Africa; Europe and Asia Pacific; Middle East and Africa; Africa and Asia Pacific; and Africa and North America (refer to Table 4). Europe is the most competitive region with ratings across all the attributes consistently significantly higher than for all the other regions. Africa, on the other hand, is the least competitive region with consistent lowest ratings across all attributes (refer to Table 4). Most surprising is that Middle East is significantly more competitive than Central and South America, Africa and Asia Pacific and not any different from Europe and North America on safety and security, given the highly publicized political instability in the Middle East.

Overall, competitiveness is relatively high for the regulatory framework sub-index and the five related pillars. With the exception of Africa on policy rules and health and hygiene all regions score high above four out of possible seven on all the pillars.

Table 4: Significant regional differences in T&T regulatory framework and the related pillars

Sub-index and Pillars	Region (A)	Region (B)	Mean difference (A-B)
Travel & Tourism (T&T) regulatory framework	Europe	Central & S. America Africa Asia Pacific	0.84017* 1.23236* 0.70041*
	Africa	Asia Pacific North America Middle East	-0.53195* -0.91355* -0.76022*
Policy Rules and regulations	Africa	Europe North America	-0.82973* -1.25556*
Environmental sustainability	Europe	Central & S. America Middle East Africa Asia Pacific	0.58890* 0.99127* 0.44249* 0.75171*
Safety and Security	Europe	Central & S. America Africa Asia Pacific	1.03067* 0.83815* 0.78676*
	Middle East	Central & S. America Africa Asia Pacific	1.24369* 1.05116* 0.99978*
Health and hygiene	Europe	Central & S. America Middle East Africa Asia Pacific	1.84104* 1.28563* 3.60786* 1.74786*
	Africa	Central & S. America Middle East Asia Pacific North America	-1.76682* -2.32222* -1.86000* -2.52750*

*Significant at 0.05: Means are based on a scale with a possible maximum of 7.

Sub-index B: Travel and Tourism Business Environment and infrastructure

The results showed significant regional differences on the travel and tourism business environment and infrastructure sub-index B (Table 5). Significant regional differences were also noted in all the five pillars under this sub-index including:

- Air and ground transport infrastructure
- Tourism infrastructure
- ICT infrastructure
- Price competitiveness in the travel and tourism industry

Table 5: Significant regional differences in T&T business environment & infrastructure and related pillars

Sub-index and Pillars	Region (A)	Region (B)	Mean difference (A-B)
Travel & Tourism (T&T) business environment and infrastructure	Europe	Central & S. America Africa Asia Pacific	0.97857* 1.46712* 0.61837*
	Africa	Asia Pacific North America Middle East	-0.84875* -1.84105* -1.25355*
	Central & S. America	North America	-1.35250*
Air transport infrastructure	Africa	Europe North America Middle East Asia Pacific	-1.33214* -2.89452* -1.31341* -1.05692*
	Central & S. America	Europe	-80080*
	North America	Europe Central & S. America Asia Pacific	1.56238* 2.36318* 1.83760*
Ground transport	Central & S. America	Europe Asia Pacific	-1.44067* -0.98671*
	Africa	Europe Asia Pacific	-1.47896* -1.02499
Tourism infrastructure	Europe	Central & S. America Africa Asia Pacific	2.11210* 2.96667* 2.27319*
	North America	Central & S. America Africa Asia Pacific	2.16841* 3.02298* 2.32950*
	Middle East	Africa	1.90104*
ICT infrastructure	Africa	Central & S. America Middle East North America Asia Pacific Europe	-0.85249* -1.49724* -2.25113* -1.17693* -2.31280*
	Europe	Asia Pacific Central & S. America	1.13587* 1.46030*
Price competitiveness	Europe	Central & S. America Middle East Asia Pacific Africa	-0.92284* -1.18683* -1.04718* -0.76141*
	North America	Middle East Asia Pacific	-0.95194* -0.81230*

*Significant at 0.05: Means are based on a scale with a possible maximum score of 7.

The results follow a similar trend as that for the regulatory framework sub-index, with Europe and North America being the most competitive regions and Africa the least on most of the attributes. North America has the most competitive air transport infrastructure, significantly more competitive than Europe (refer to Table 5). Air transport infrastructure is the first attribute in which Europe and North America's competitiveness significantly differ. However, both Europe and North America were the least price competitive of the six regions. The Middle East is the most price competitive

region, significantly more competitive than both Europe and North America, but not significantly different from Asia Pacific, Africa and Central and South America.

Europe needs to improve air transport infrastructure to increase its competitiveness in this area. Both Europe and North America need to improve on price competitiveness especially as they face increasing competition from other upcoming regions such as Asia, Middle East and South America which are highly price competitive. While Europe and North America lead in ICT infrastructure, they both need some improvement in this area as they are just slightly above average. The rest of the regions need even more work on ICT infrastructure development.

Sub-index C: Travel and Tourism human, cultural and natural resources

Significant regional differences were noted in the human, cultural and natural resources sub-index C and also in three of the four pillars under this sub-index. No significant regional differences were noted in the 'affinity for travel and tourism' pillar. The four pillars under this sub-index include: Human resources; affinity for travel and tourism; natural resources; cultural resources.

North America is the most competitive region under the third sub-index of cultural, human and natural resources. North America's strength is in its natural resources which are significantly more competitive than those of Europe and the Middle East (refer to Table 6). The Middle East has the least competitive natural resources while Africa has the least competitive human resources. Surprising is that both Europe and North America are significantly more competitive than Africa and the Middle East on cultural resources, an attribute mostly associated with African and to some extent Middle Eastern destinations. Most significant for African destinations is that the region's natural resources are just as competitive as those for the two most competitive destinations of Europe and North America.

Given the Middle East's weakness in natural and cultural resources, there is need for innovative to improve the region's competitiveness with developments including man-made attractions and special events and festivals to counteract the comparative disadvantages. Africa has rich culture and heritage, but is least competitive in this area indicating a great need for effective deployment of resources to optimize potential and increase competitiveness.

Table 6: Significant regional differences in T&T human, cultural and natural resources and related pillars

Sub-index and Pillars	Region (A)	Region (B)	Mean difference (A-B)
Travel & Tourism (T&T) human, cultural and natural resources	Europe	Middle East Africa	0.60984* 0.85171*
	Africa	Asia Pacific North America Central & S. America	-0.62382* -1.36742* -0.49151*
	North America	Middle East Central & S. America	1.12556* 0.87591*
Human resources	Africa	Europe North America Asia Pacific Middle East Central & S. America	-1.26317* -1.46484* -1.00244* -1.11484* -0.82211*
	Europe	Central & South America	0.44106*
Natural resources	North America	Europe Middle East	1.60155* 1.94306*
	Central & S. America	Europe Middle East	0.97677* 1.31828*
Cultural resources	Europe	Central & S. America Africa Middle East	1.68152* 2.29188* 1.85056*
	North America	Central & S. America Africa Middle East	2.28318* 2.89355* 2.45222*
	Africa	Asia Pacific	-1.36635*

*Significant at 0.05: Means are based on a scale with a possible maximum score of 7.

CONCLUSIONS

The results clearly show that North America and Europe are the most competitive tourism regions on pretty much all the attributes based on the WEF destination competitiveness model. Both North America's and Europe's weakest point is price competitiveness. Europe is the least price competitive destination followed by North America. While these two regions are the most competitive destinations overall, what they offer comes at a relatively high price.

Africa, is the least competitive region based on almost all of the attributes except price competitiveness, but has great potential given its rich cultural and natural resources as well as strong will and affinity for tourism. Two attributes in which Africa has competitive strength are natural resources and affinity for tourism. These are the only two attributes in which the region didn't significantly differ from the highly competitive regions of Europe and North America. However, by themselves natural resources and openness to foreign visitors don't built destination competitiveness. According to Ritchie and Crouch (2003) while natural and built resources are important for a destination comparative advantage, competitive advantage comes from the destination's ability to effectively deploy those resources over the long term. African destinations have a great challenge in terms of effective deployment of the rich natural and cultural resources in-order to compete globally. Africa's lowest mean score (2.81) is for the travel and tourism

business environment and infrastructure sub-index, also the lowest among all the other regions. Basic infrastructure is the starting point for any successful destination therefore, African destinations need to first get the basics right to effectively compete on the global scene. In addition, African destinations trail behind all the other regions on most pillars most importantly health and hygiene, ICT infrastructure, air transport infrastructure and human resources.

Middle East region is relatively and surprisingly competitive given the turmoil associated with that region. The Middle East is even significantly more competitive than Asia Pacific, Africa and Central and South America regions on safety and security and not significantly different from Europe and North America. The Middle East scored above average (>3.5) on all the three sub-indexes implying that it is a comparatively competitive destination. The Middle East greatest weakness lies in its human, cultural and natural resources, especially natural resources. The Middle East's overall above average competitiveness given its weak natural resources demonstrates the region's innovativeness and effectiveness in deploying its resources to enhance its competitive advantage.

Asia Pacific and Central and South America regions, while not as competitive as North America and Europe have their own points of strength. Central and South America is, overall, the second least competitive region after Africa, but is strong on price and natural resource competitiveness. Central and South America is significantly more competitive than Europe on natural resources and not any significantly different from North America in human resources, health and hygiene and policy rules and regulations. Asia Pacific is the fourth most competitive region overall after Europe, North America and Middle East. Asia Pacific's weaknesses include its tourism infrastructure and cultural resources.

It can be seen and concluded from the findings that each region has its own destination competitive strengths and weaknesses. Some regions such as North America and Europe are overall very highly competitive with a few weaknesses while others such as Africa and Central and South America struggle and have a lot of work to be done. Overall, the least competitive areas fall under the business environment and infrastructure sub-index including: air and ground transport, tourism and ICT infrastructure and price competitiveness. With an overall average score of 3.65 out of seven, all regions including Europe and North America could use some improvement in these areas. With an overall average score of four, the human, cultural and natural resources sub-index has the second lowest score. While human resources affinity for tourism can be improved, there is little that can be done about natural and cultural resources. However, destinations can complement their weak natural and cultural endowments through development of tourism superstructure, special events and festivals to enhance competitiveness.

While the data give an overview of the overall regional competitiveness, the limitation of this analysis is that it can't be generalized to specific individual destinations' competitiveness as regions are comprised of a number of very different countries with a diverse resources, policies and regulations.

REFERENCES

- Cracolici, M. F., Nijkamp, P., & Rietveld, P. (2008). Assessment of tourism competitiveness by analyzing destination efficiency. *Tourism Economics* 14(2), 325-342.
- Dwyer, L., Forsyth, P. & Rao, P. (2000). The price competitiveness of travel and tourism: A comparison of 19 destinations. *Tourism Management* 21(2000), 9-22.
- Enright J. and J. Newton. 2004. Tourism destination competitiveness: a quantitative Approach. *Tourism Management*, 25(6), 777-788
- Formica, S. (2002). Measuring destination attractiveness: A proposed framework. *Journal of American Academy of Business* 1(2): 350-355.
- Hsu, H. C., Wolfe, K., & Kang S. K. (2004). Image assessment for a destination with limited comparative advantages. *Tourism Management*, 25 (2004), 121-126.
- Kozak, M. (2002). Destination benchmarking. *Annals of Tourism Research* 29(2), 497-519.
- Kozak, M., & Rimmington, M. (1999). Measuring tourist destination competitiveness: conceptual considerations and empirical findings. *Hospitality Management* 18(1999), 273-283.
- Lee, W., & Josium, B. M. (2004). A framework for assessing national convention tourism competitiveness: An exploratory study. *Journal for International Business and Entrepreneurship Development* 2(2), 105-112.
- Milman, A. & Pizam, A. (1995). The role of awareness and familiarity with a destination. *Journal of Travel Research*, 33(3), 21-23.
- Nyberg, L. (1995). Determinants of the attractiveness of a tourism region. In S. F. Witt & L. Moutinho (Eds.). *Tourism Marketing and Management Handbook* (pp. 29-38). Hertfordshire: Prentice Hall.
- Nishaal, G., & Guntur, S. (2005). Competitiveness indicators in the travel and tourism industry. *Tourism Economics* 11(1), 25-43.
- UNWTO. (April 2011). *UNWTO World Tourism Barometer* (Interim Update). Retrieved from: <http://abouttourism.wordpress.com/2011/01/18/unwto-world-tourism-barometer-advance-release-international-tourism-2010-multi-speed-recovery/>
- Uysal, M., Chen, J. S., & Williams, D. R. (2000). Increasing state market share through regional positioning. *Tourism Management*, 21(2000), 89-96.
- World Economic Forum. (2009). *The travel and tourism competitiveness report*. Retrieved from http://www3.weforum.org/docs/WEF_GCR_TravelTourism_Report_2009.pdf

RESIDENTS' PERCEPTION OF THE WORLD EXPO 2010 SHANGHAI

Cathy H.C. Hsu
School of Hotel and Tourism Management
The Hong Kong Polytechnic University, Hong Kong, PRC

Xiang (Robert) Li
School of Hotel, Restaurant, and Tourism Management
University of South Carolina, USA

and

Laura Lawton
Department of Tourism, Leisure, Hotel and Sport Management
Griffith Business School
Griffith University, Gold Coast Campus, Australia

ABSTRACT

The purpose of the study was to assess local residents' perceptions of the World Expo 2010 Shanghai, using a qualitative method. Perceived economic and social impacts were the center of research focus. Differences in perception between those who visited the Expo and those who did not visit as well as between the 18-45 years old residents and those over the age of 45. Four focus groups were conducted in Shanghai shortly after the Expo, in early November 2010. Analysis of the transcript showed that whether they had visited the Expo site did not make substantial difference in participants' opinions expressed during the focus group discussion. However, opinion differences were found between the older and younger participants. Possible reasons of the differences were explored.

KEYWORDS: World Expo, Mega event, China, Economic impact, Social impact

INTRODUCTION AND METHODOLOGY

China has experienced huge social and economic changes in the past three decades due to the implementation of the open-door policy and economic reforms. The hosting of mega events, such as the 2008 Beijing Olympics and World Expo 2010 Shanghai, also prominently put China on the world map. These events have brought global media coverage of happenings in China on a regular basis.

Studies have been conducted on the impacts of special events (Fredline & Faulkner, 2000; Kim & Petrick, 2005; Zhou & Ap, 2009). However, due to the length and magnitude of the World Expo, the impacts on residents, society, and the economy warrant a closer look to enhance the understanding of consequences of extended mega events. The most recent World Expo hosted by Shanghai in 2010 lasted for six months (May 1st to Oct 31st) and received 73

million visitors to the venue which was recorded as the most attended World Expo in history (Expo 2010 Shanghai China, 2010).

The purpose of the study was to assess local residents' perceptions of the event. Specifically, the study was designed to identify (1) residents' perceived economic and social impacts of the event on a personal level as well as on a community level and (2) differences in perception based on age of residents and whether they had visited the Expo. To obtain in-depth knowledge of the phenomenon, a qualitative approach via focus group interviews was adopted. Focus group discussions offer researchers the opportunity to gather qualitative data regarding the perceptions of purposely selected individuals. When conducted properly, extensive information about participants' thoughts and feelings on the topic under investigation can be obtained in a reasonably short period of time (Vaughn, Schumm & Sinagub, 1996). Four focus groups were conducted in Shanghai shortly after the Expo, in early November 2010.

The four focus groups consisted of (1) 18-45 year-old visitors, (2) 46 years and older visitors, (3) 18-46 year-old non-visitors, and (4) 46 years and older non-visitors. Each group included eight participants recruited from 12 urban districts of Shanghai. To minimize gender and geographic bias, each focus group session included 4 males and 4 females from 5-6 districts. Further, the two younger groups (i.e., 18-45 year olds) both included at least 2 college students. An interview guide was prepared to ensure consistency of discussion direction among groups. The focus groups were conducted in Mandarin Chinese; each lasted about 90 minutes and was audio recorded. Transcripts in Chinese were analyzed using NVivo 8, which facilitated the categorization of codes into groups (i.e., code families). The efficiency of the software leaves researchers more time and a clear mind to reflect and observe the data and their meanings.

RESULTS

Participants' comments were categorized and grouped into themes. The themes are discussed below. Quotes from the discussions, translated into English, are provided as evidence. Participants are coded as G1-1 through G1-8 (18-45 year-old visitors), G2-1 through G2-8 (46 years and older visitors), G3-1 through G3-8 (18-46 year-old non-visitors), and G4-1 through G4-8 (46 years and older non-visitors).

Economic Impacts on Individuals

Participants were unsure of the personal economic impact. The majority mentioned the "gift pack" provided by the government to each household as the only positive economic impact on an individual level. The gift pack consisted of an Expo ticket and RMB200 (approximately USD\$30) worth of subway/bus credit. Respondents representing the various demographic backgrounds also mentioned the inflation of food and housing prices and the stagnated income level. The perception was that only those working in the Expo or the tourism and hospitality industry were better off economically. One participant from the construction industry indicated that their income had declined because the government halted all construction activities during the Expo period to minimize air pollution.

G1-2: I didn't get any benefits from the Expo, except the big gift pack from the government. (Male, 38)

G1-5: I guess the inflation will continue to rise. (Female, 22)

G2-6: The negative impact to me is the rising prices. (Female, 47)

G4-7: Government controlled the inflation before the start of the Expo; however, the prices of a lot of products were raised after the Expo. (Male, 46)

G4-1: The price of rice has increased from RMB2.5 per 500gm to more than RMB3 per 500gm. (Female, 51)

G2-8: People working in the Expo have higher income. Take myself as an example, as an artist in the Shanghai Yue Opera Troupe, I performed with my colleagues sometimes for 11 times a day, and the income was good. (Male, 60)

G2-6: The Expo boosted the industries of hotel, attraction, and tourism. (Female, 47)

G1-3: Most of the room rates doubled; therefore the hotel industry benefited a lot. (Male, 40)

G1-2: The Expo boosted not only the tourism in Shanghai, but also in nearby areas, such as Suzhou and Hangzhou. I have several friends working in the car rental industry, and have a lot of customers visiting the areas near Shanghai. (Male, 38)

G4-5: I know that the drivers from the Expo bus line got many incentives, due to the greater passage flow. (Male, 57)

G1-5: I think the labor market would be more competitive, because many people working in the Expo would lose their job. When I graduate from college, I have to compete with them. (Female, 22)

Social Impacts on Individuals

Participants viewed those residents who had to be relocated to make way for the Expo site and infrastructure enhancement projects to be better off with higher quality living arrangements. However, during the Expo period, residents had to experience many inconveniences, such as the crowds and extra security checks at public transportation points, which took residents extra time commuting to work every day. With tourists converging in Shanghai, the normal VFR market finds it challenging to get to Shanghai and to find reasonably priced accommodation. Some residents were also overwhelmed by the Expo attendance number which discouraged their visit of the Expo.

Those working in related industries, such as airport and public transport, indicated that they had to work longer hours and be extra vigilant due to the large number of government officials visiting Shanghai during the Expo period. Some mentioned that they had to work extra shifts because many young employees took a few days off to visit the Expo.

G2-5: The demolition of the houses, to me, has both pros and cons. The good thing is that my living condition has improved, and the house is bigger and better. The

bad thing is that the house is very far away, and I have to spend more time on the commute. (Female, 49)

G4-8: The relocated houses are much better than the shantytowns. (Female, 46)

G3-4: The subway was crowded during the Expo period. In the past, the subway Line 2 was not crowded, but during the Expo it's crowded even very late at night. (Female, 41)

G1-5: The subway was extremely crowded, and in some cases the doors couldn't close, but still there were many people trying to get in. (Female, 22)

G3-4: Everyone must have a security check before entering the subway, I think it wasted a lot of time. (Female, 41)

G4-6: When I came back to Shanghai, I had to go through a security check. The police had to check my ID. (Male, 49)

G4-6: I would like to book a room for my friend who visited Shanghai, but the room rate was around RMB 300, much higher than the previous rate of RMB 200. (Male, 49)

G1-6: Take myself as an example, as a security guard in the Hongqiao Airport, I had to work longer hours and conduct more safety reviews; and I had to work harder than before. (Male, 32)

G4-8: If I planned to visit the Expo on a certain day, I would pay attention to the visitor number. If the number was between 200,000 and 500,000, I would try. If there were more than half a million visitors, I needed to line up for 5-6 hours. (Male, 40)

G3-4: I paid attention to the number because I planned to visit the site on days with fewer visitors. But, the number of visitors got larger and larger. During the last month of the Expo, the daily attendance was about one million. (Female, 41)

Economic Impacts on Community

Almost all respondents believe Shanghai will benefit from the Expo in the long run. However, this belief was not based on any hard evidence because they all expressed their thoughts starting with a verb such as “guess,” “suppose,” and “feel.” They indicated that the government has not disclosed any information regarding the Expo budget or the total investment required to host the event. Several people opined that the government spent too much on this event and there is no way to recuperate the investment. A few participants even went a step further indicating that this was a waste of public money and human resources, which could be better used to help the poor.

G2-4: I guess the Expo was economically successful, because the visitor number was higher than 70 million. (Male, 46)

G4-5: I suppose the Expo made some money from the ticket sales, but we didn't know the details. (Male, 57)

G1-7: It sounds like that the Expo was successful. (Female, 36)

G3-8: There is no rapid increase of GDP in October 2010. It seems that the Expo did not contribute to the GDP growth. (Male, 40)

G1-1: The government invested a lot of money on the Expo, ranging from the bidding for the Expo, to the hosting of it. In addition, the government spent much money on the environmental improvement. (Female, 34)

G3-8: The government spent a lot of money on the Expo. I think hosting such a big event in the future will be much better, because nowadays China is not economically strong enough to support such a big event. There are a lot of poor people in China, and I think the government should help those poor people first. (Male, 40)

G4-1: In China the big events, such as the Expo 2010 Shanghai and Guangzhou 2010 Asian Games, cost a large amount of money; and a huge number of people is involved in these events. I know that many performers have practiced and prepared for the opening and closing ceremonies for a year. It's very wasteful. (Female, 51)

Social Impacts on Community

Participants provided a long list of positive social impacts, including urban development, safety and security of the city and international reputation of Shanghai. The infrastructure of the city has been upgraded, which makes the public transportation more convenient, city appearance cleaner, and living environment better. One of the most often mentioned observations relates to the improved citizenship behavior of Shanghai residents. Participants indicated that local residents are now more polite, considerate, and friendly. Children had the opportunity to learn about other cultures; and young and old all broaden their horizons. There was also a sense of pride among some participants for the city's ability to host such a mega event.

G3-4: The urban environment has been improved, and the layout, design, and architectures are becoming better. (Female, 41)

G1-5: The Expo boosted the urban development. For example, the roads become wider, and the environment becomes more environmental friendly. (Female, 22)

G1-3: The government built more subway lines, such as lines 13 and 10. (Male, 40)

G4-7: The city becomes beautiful, because the walls in some communities are demolished or repainted. (Male, 46)

G3-1: The Expo has improved the international reputation of Shanghai. Shanghai becomes more internationalized. (Female, 28)

G1-3: The international reputation of Shanghai has been improved. The success of the Expo means that China is capable of hosting such a big and long event. It is successful because there is no accident happened in the Expo. (Male, 40)

G2-7: People become polite and nice; in the past, we didn't like to talk with strangers. You used to be able to find a lot of people wearing pajamas hanging out on the street. (Female, 53)

G2-5: People become civilized, and I will not leave rubbish on the road. (Female, 49)

G4-4: If I want to spit, I will find a litter first. (Male, 56)

G2-7: We cared about breaking the record of 70 million visitors. If there were many visitors in the Expo that day, I would be happy. I cared a lot about the visitor numbers. I still remember that one day I watched the news from mobile TV on the bus that there were 0.8 million visitors; and when I watched the evening news, I found out that there was more than 1 million visitors! (Female, 53)

G2-5: I cared about the daily visitor numbers. I usually get the visitor numbers from "Xinmin Evening News" and mobile TV on the bus. (Female, 49)

The majority of participants mentioned the terrible air quality after the Expo, as a sharp contrast to the clean air and blue sky enjoyed during the Expo period. The disastrous apartment fire happened shortly after the closing of the Expo was attributed to the lack of post-event long-term management strategy. The fire was caused by an electrical short circuit of a building construction company that was trying to make up for lost time because during the Expo period, all construction was halted.

G2-4: We could see the blue sky and white clouds during the Expo, however the air becomes terribly bad after the Expo. We have experienced serious air pollutions for a few days. (Male, 46)

G2-2: All of the construction projects were stopped during the Expo to minimize air pollution, but now the air pollution is back again with the starting of the construction projects. (Male, 57)

G1-2: I haven't seen the blue sky for a month. I am angry with today's air quality. We also have to face the noise pollutions as there are many construction sites. (Male, 38)

G1-6: The long term management strategy, such as the safety and security issues, isn't good. A lot of projects have to finish their work as soon as possible, as these projects have been postponed for a long time. (Male, 32)

DISCUSSION AND CONCLUSION

This study analyzed residents' perception on the economic and social impacts of the Expo 2010 Shanghai from individual and community perspectives. Both positive and negative impacts were identified at individual and community levels. However, it appears that more positive impacts were reported at the community level, whereas more negative impacts were mentioned at the individual level.

Analysis of the transcript showed that whether they had visited the Expo site did not make substantial difference in participants' opinions expressed during the focus group discussion. This could be due to the massive amount of media coverage by local television

and radio stations, as well as print and online media. Local residents were bombarded with Expo information. Further, the sheer scale of the Expo made it primarily impossible for residents not to be impacted, regardless of their level of involvement or visitation status.

However, opinion differences were found between the older and younger participants. For example, the government early on announced the goal to break the historical Expo attendance record of 70 million. Older participants indicated that they very much cared about the ability to break that record and eagerly waited to hear the attendance number every day. However, younger participants could not care less about the record breaking goal. They paid attention to the daily attendance number because they wanted to know when would be a better time for them to visit the site.

More young participants voiced out their concerns about the money and resources poured into this single event. They viewed that the one-off event has not provided immediate economic benefits to the city or themselves. The demolition of the pavilions after the event was perceived as particularly wasteful.

The differences in opinions between the older and younger focus groups could be a result of the opening up of China, which facilitated the economic and information flows. There has been evidence that Chinese culture has been impacted by globalization (Tian, 1998); and many people, especially for the young, began to embrace individualism (Wang, 2006). Responses provided by younger participants in this study appear to be more individualistic and pragmatic, whereas the older participants are more collectivistic in supporting the government goals.

The study is exploratory in nature. Conclusions were made based on four focus group discussions, thus have limited generalizability. Future studies could employ a quantitative research design to provide further empirical evidence to support the observations made in this study. Longitudinal research will also contribute to the understanding of long term impacts of mega events.

REFERENCES

- Expo 2010 Shanghai China. (2010). *Expo 2010 Shanghai China*. Received March 23 2011, from <http://en.expo2010.cn/>
- Fredline, E., & Faulkner, B. (2000). Host community reactions - A cluster analysis. *Annals of Tourism Research*, 27(3), 763-784.
- Kim, S. S., & Petrick, J. (2005). Residents' perceptions on impacts of the FIFA 2002 World Cup: the case of Seoul as a host city. *Tourism Management*, 26(1), 25-38.
- Tian, X. (1998). *Dynamics of Development in an Opening Economy: China Since 1978*. Nova Science Publishers, Commack, NY.
- Vaughn, S., Schumm, J.S., & Sinagub, J. (1996). *Focus group interviews in education and psychology*. London: Sage.
- Wang, Y. (2006). Value changes in an era of social transformations: College-educated Chinese youth. *Educational Studies*, 32(2), 233-240.

Zhou, Y., & Ap, J. (2009). Residents' Perceptions towards the Impacts of the Beijing 2008 Olympic Games. *Journal of Travel Research*, 48(1), 78-91.

ACKNOWLEDGEMENT:

The work described in this paper was supported by grants from the School of Hotel and Tourism Management, The Hong Kong Polytechnic University (Project No. 1-ZV2F); College of Hospitality, Retail, and Sport Management, University of South Carolina; and School of Tourism, Leisure, Hotel and Sport Management/Centre for Tourism, Sport and Service Innovation Research (TSSI), Griffith Business School, Griffith University.

Having Fun Together:
Exploring Leisure Trip Activity Participation of
Korean Families with Children of Disabilities

Song Ee Kim
Hospitality and Tourism Management
Purdue University, USA

and

Xinran Y. Lehto
Hospitality and Tourism Management
Purdue University, USA

ABSTRACT

While research to understand family as a leisure travel unit has received healthy attention in recent years, rare attention has been given to families of children with disabilities. This current study attempts to investigate the tourism activities of Korean families with disabled children through a sample of 161 such families. Utilizing factor analysis, this study identified seven activity factors. Among them ‘nature appreciation’ and ‘sedative outdoor activities’ appeared to be the most popular types of activities reported by the families of children with disabilities. This study also examined whether family demographic characteristics influence activity preferences and identified significant relationships between the two domains. Variation in frequency of activities were explored in relation to patterns of family involvement and this study revealed that the activities varied according to who was involved. Theoretical and managerial implications and recommendations to more effective service this group of families were discussed.

KEYWORDS: Children with disability; Family leisure travel; Trip activities.

INTRODUCTION

Families with children with developmental or physical disabilities have received considerable attention within disability and leisure research (Mactavish and Schleien, 2004). Among the various approaches regarded as beneficial to families with disabled members, many researchers have proposed using family recreation as a potential mechanism for overcoming the increasing pressure and demands as a result of one family member’s disability (Glidden, 1993). Family is regarded as an essential component in providing recreation and developmental opportunities for disabled children (Schleien and Ray, 1997). However, parents of disabled children have reported greater levels of stress than parents of healthy children (Pelchat *et al.*, 1999). Due to the stresses, families with a disabled member can find themselves restricted in participation of many activities. In particular, tourism is one activity that many people with disabilities feel must be sacrificed since it is recognized as a complex interaction between body function, activity

participation and the environment (McKercher *et al.*, 2003).

In Korea, a total 2.4 million people are registered as disabled as of the end of 2009, rising an average of 11.2% a year, since 2000 according to the annual statistic report by Korea Employment Promotion Agency for the Disabled. However, the general public's negative attitude toward disabled people has adversely impacted disabled individuals' lives (Kim and Kang, 2003). Koreans superstitious beliefs are deep-rooted in that they perceive having disabilities as fatal abandonment and shameful (Kyun, 2000). This strong prejudice makes people with disabilities perceive themselves with low self-esteem (Kim and Kang, 2003). The impact is especially palpable for children with disabilities. In particular, adolescents with disabilities in Korea find it difficult adapting themselves into the mainstream society due to emotional uneasiness, serious feelings of inferiority, wariness, sense of dependence, immaturity of self-image formation, delayed of social development, and anti-social behaviors (Ku, 1993).

Differences in physical, mental or emotional conditions between a family with or without disabled children may lead different needs, interests and limitations when it comes to participation in tourism activities. Therefore, those various special needs have to be carefully addressed if the hospitality and tourism industry intends to serve this market segment with quality. While research to understand family as a travel unit has received healthy attention in recent years (Yun and Lehto, 2009), rare attention has been given to families of children with disabilities. Research regarding leisure travel of families that include children with disabilities is an area of study essential to achieving understanding of disabled travelers' special needs, perceptions, and preferences (Mactavish and Schleien, 2004).

Against this background, this study attempts to address the need for greater knowledge about leisure travel in families that include children with disabilities by focusing on their tourism activity participation pattern and the relationship between participation and household role. The present research aims at providing a better interpretation of the viewpoints of families of children with disabilities, thus linking industry practices to the needs of disabled consumers.

LITERATURE BACKGROUND

Leisure as a subject area has received healthy amount of attention by researchers from various fields. It has been suggested that no single definition of leisure will satisfy for every purpose. In 1987, Gunter conceptualized leisure as a subjective experience that focuses more on the state of mind than on the discrete activity. Passmore and French (2001) supported Gunter's definition by stating that leisure includes engagement in freely chosen pleasurable activities and provides a sense of achievement and meaning. Other studies have identified positive correlations between the enjoyment of leisure and well-being, entertainment, and self-improvement (Argyle, 1996). While leisure can be conceptualized in different context, it is important to note that current literature shares a common emphasis on the importance of leisure, regardless of definitional variability. In particular, positive relationship between leisure involvement and life satisfaction has

been consistently reported by researchers (Johnson *et al.*, 2006).

While there has been relatively lack of exchange of theories between leisure and tourism, the number of researchers who have begun to draw tentative relationships between leisure and tourism has been growing (Brey and Lehto, 2008). The majority of attempts to establish the nature of relationship between tourism and leisure have indicated that the two are interrelated and concepts developed in one field may be used or adapted in the other (Ryan, 1994). Butler (1999) suggested that when tourism is something which takes place during leisure time, leisure tourists' activities can be viewed logically as a part of leisure and recreation. Ryan (1994) insisted that intrinsic motivations and enjoyment experiences theoretically overlap in leisure and tourism.

Researchers in leisure studies have long shared an interest in families. Leisure is an important part of family life as family members are common or frequent leisure companions throughout the life cycle. Since family leisure is essential for healthy family relationship, parents consciously and deliberately plan and facilitate family leisure activities (Shaw and Dawson, 2001). Children's participation in family leisure activities is significantly related with their positive developmental process and physical and mental well-being (Larson and Verma, 1999). According to the study of Huff *et al.* (2003), taking part in challenging outdoor recreation together as a family enhances family relationship such as improved communication and interaction, increased affection and kindness, and elevated level of trust and support between family members. Moreover, Wells, Widmer, and McCoy (2004) identified efficacy of resolving conflict and problems through participation of family leisure activities.

Leisure is a central concept to adolescence, because 'it may be a crucial life space for the expression and development of selfhood, for the working out of identities that are important to the individual' (Kelly, 1983). Therefore, the role of parents as leisure educators is important. The positive outcomes resulting from leisure activities are also identified by families that have a child with a disability. In 1998, Mactavish and Schleien identified family leisure as a means of promoting overall quality of family life (e.g., family unity, satisfaction, physical and mental health) and for helping family members develop various life and social skills. For children, participating in formal and informal activities is fundamental in terms of development of skills and competences, social relationships, and long-term physical and mental health (Forsyth and Jarvis, 2002).

In the tourism context, the importance of understanding activities has been emphasized. According to Morrison *et al.* (1995), travel activity participation represents a form of traveller behavior, and activity participation behavior is the outcome of traveller preferences. In other words, a traveller's chosen activity is evidence of the traveler's preference among many activity options that are usually offered in a destination, so travel activity may be considered as a variable for travel demand. Moscardo *et al.* (1996) posit that activities are the consequential link between tourist motivation and destination choice. Beritelli & Boksberger (2005) suggested that the destination should have certain types of activity for traveler because they found a correlation between travel activities and motives. Tourism researchers have stated that the pull and push factors influence

people's decision to travel and their choice of destination (Kim *et al.*, 2003). The push factors are the intrinsic socio-psychological stimuli such as escape from routine surroundings, relaxation, and social interaction. The pull factors are the attractiveness that draws travellers to visit the destination. The pull factors can broadly be classified as tangible ones such as scenic landmarks and local events/festivals, or intangibles ones such as destination image and travellers' benefit expectations. The visitors' spending on dining, accommodation, entertainment, and other related industries eventually permeates into every sector of the tourist-receiving destination, directly and positively contributing to the growth and prosperity of the destination (Kotler *et al.*, 1999). It is, therefore, important to understand tourists' perceptions and preferences of destination activities. However, little is known about the activities engaged in by families with disabled children due to perhaps the lack of research attention given to this segment.

Leisure travel activities provide unique interaction and bonding opportunities for family members (Lehto *et al.*, 2009). Most family trips consider activities as an important vehicle building connection between family members (Yun and Lehto, 2009). However, none of the existing studies have explored family-based leisure travel activities at a destination for the population of families of children with disabilities. Due to the special dynamic of this family segment, the discoveries based on individuals or even the general family population should not be automatically assumed to be applicable to these family travelers.

Research on recreation activities generally distinguishes between forms of involvement and patterns of participation. In describing this distinction, Kelly (1982) stated that "what is done (i.e., form) is the principal concern" (p. 183). Consistent with this contention, the first research question addressed in this paper pertains to the most popular activities of family leisure travel identified in relation to family as a whole. The second research question, integrated the notion of "with whom" by examining the forms most often engaged in by different combinations of family members (i.e., activities involving all family members versus those involved by smaller groups within the family).

Specifically, the objectives of this research were fourfold:

- 1) to identify preferred activities of leisure travel by families with children of developmental challenges;
- 2) to examine whether family demographic characteristics influence identified activity factors of family leisure travel;
- 3) to identify activities most often engaged in together by various family members and to examine whether the activities varied according to who was involved; and
- 4) to provide academic and managerial insights to better service family with disabled children.

METHODOLOGY

Data was collected using both qualitative and quantitative methods. The qualitative assessment included seven in-depth interviews with 7 families with disabled children and extensive literature review of family leisure tourism and disability studies to

derive insights on leisure travel patterns of families of children with disabilities. A structured survey questionnaire was developed based on the qualitative assessment. The survey was initially designed in English and was later translated into Korean by two researchers with bilingual background and familiar with the questions being asked and with the nature of the research. A total 250 families with disabled children were invited to fill out a self-administered survey questionnaire. One adult member of each family was invited to fill out the survey on behalf of his or her family. 161 valid questionnaires were returned, yielding a 64.4% response rate. The sample was obtained from various organizations including a school of special education for children with disabilities, a church, and private associations for the disabled. The survey instrument used in this study was composed of three main sections: demographic information, leisure trip behavioral information, and activities of family leisure trip. For measures of travel activities of families of children with disability, fifty six family leisure activities were developed. The list was based on the personal in-depth interview of families with disabled children and review of current market trends, disability research, and the family leisure activity literature. The questions asked the respondents to indicate their level of participation with each statement using a 5-point scale (1=almost never, 2=once in a while, 3=sometimes, 4=frequently, and 5=almost always). Respondents were further asked to identify specific participating members for each activity based on their most recent leisure trip. The obtained data were analyzed using SPSS 17.0. Descriptive statistics were used to profile the characteristics of the sampled family travelers. Principle components analysis with Varimax rotation was computed to identify the dimensionality of activities. Independent sample *t* test and one-way analysis of variance (ANOVA) were used to explore leisure travel patterns in relationship to family demographic characteristics.

RESULTS

Of the respondents, the proportion of women (68.3%) was approximately two times greater than men (31.7%) and about 44.7% of them were in the age range of 40 and 49 years. Most of the respondents' roles in household were mothers (51.2%). About 62.5% of sample had one disabled child and one normal child. Concerning types of disabilities, about 84% of them reported that their children had learning and developmental disabilities. As for severity of disabilities, level 1 which is the most severe according to the classification system developed by the Korean Ministry of Health & Welfare was the largest category. About fifty percent of the families took a leisure trip one to two times a month. Their popular destinations were mountains (32.9%), rural areas (22.4%), and urban areas (19.3%). The main method of transportation they used was their own car (84.5%). About 35% responded that they usually had a day trip.

What are the most popular activities of family leisure travel?

Families were asked to rate activities they "most preferred" engaging in during shared leisure travel involving all members of the family (Table 1). An exploratory factor analysis was performed on the sample ($n=161$) using the principal component method with VARIMAX rotation. Seven factors of activities were extracted based on the rule of extracted eigenvalue being higher than one (SPSS 17.0). It accounted for 68% of total

variance and revealed a seven-factor underlying structure for activities in leisure travel for family with disabled children. The results showed that identified factors were reliable with Cronbach's alpha values ranging from 0.72 to 0.90.

The seven activity factors were labeled as "Sports", "Nature appreciation", "Socializing/special events", "Active outdoor activities", "City activities", "Sedative outdoor activities", and "Wellness activities". The factor of "Sports" comprises a very broad set of items of active physical activities such as soccer, swimming (water sports), and tennis. The second factor, "Nature appreciation", refers to the interest of appreciating nature and environmental quality. The factor of "Socializing/special events" represents the need for social engagement and interpersonal relationship through various socializing activities including attending sports events (Special Olympics) and participating in local events and festivals. The fourth factor of "Active outdoor activities" refers to the active outdoor activities and adventure for family travelers. It involves specific activities such as fishing, biking, and hiking. The fifth factor of "City activities" describes activities which are essentially related to entertainments such as theme parks, sport games and other city oriented activities. The factor, "Sedative outdoor activities", generally encompasses the less intensive range of outdoor activities compatible with preserving natural resource functions. Representative activities are visiting nature parks/forest, walking and trails, and playing in park. The last factor is labeled as "Wellness activities". These activities illustrated a family's desire to maintain the condition of positive physical and mental health in family as exemplifying by sense of well-being. For instance, wellness class, yoga, and health spa were particularly identified in this study. Among the identified activity factors, "Nature appreciation" (3.14), "Sedative outdoor activities" (3.10) and "Socializing/special events" (2.73) produced relatively high average mean scores.

Table 1. Mean Scores and Factor Analysis of Leisure Travel Activities

Activity Factor	Mean	Factor						
		1	2	3	4	5	6	7
Sports	1.64							
Baseball	1.49	.866						
Volleyball	1.50	.848						
Racquet ball	1.30	.820						
Softball	1.49	.798						
Basketball	1.61	.710						
Tennis	1.53	.674						
Soccer	1.72	.658						
Swimming/water sports	2.46	.492						
Nature Appreciation	3.14							
Tour countryside	3.09		.903					
Appreciate seaside scenery	3.34		.850					
Visiting scenic landmarks	3.40		.843					
Visiting mountains	3.32		.840					

Nature walk	3.02	.636					
Observing wildlife	2.66	.619					
Socializing/ Special Events	2.73						
Participating local events/festivals	2.69	.856					
Participating in local organizations' leisure outings	2.66	.797					
Visiting friends/relatives	2.94	.728					
Church meeting/retreat	2.82	.701					
Attending sports events (e.g. Special Olympics)	2.56	.643					
Active Outdoor Activities	2.49						
Fishing	2.21	.771					
Running/jogging	2.53	.742					
Biking/cycling	2.56	.694					
Hiking/climbing	2.64	.575					
City activities	2.46						
Visiting art galleries	2.22	.822					
Visiting amusement/theme park	2.18	.685					
Visiting historical sites	2.88	.659					
Visiting museums	2.71	.580					
Watching sport games	2.30	.534					
Sedative Outdoor Activities	3.10						
Walking/trails	3.37	.674					
Gardening	2.52	.664					
Picnic	3.02	.644					
Play in park	3.78	.638					
Visiting nature parks/forest	3.68	.574					
Rustic cabin rental	2.20	.529					
Wellness Activities	2.03						
Wellness class/Training	1.71	.788					
Yoga	1.49	.729					
Health Spa	2.88	.608					
Eigenvalue	5.32	5.25	3.22	3.11	3.02	2.85	2.43
Variance (%)	14.37	14.19	8.71	8.4	8.16	7.70	6.56

Effect of family demographic characteristics

ANOVA and *t* test were applied to examine whether significant relationships and differences existed between respondents' preferred activity dimensions and their family demographic characteristics (Table 2). First of all, this current study uncovered differences in the activity factors according to the role of household. The results indicated

that fathers were more interested in “Sports” and “City activities” while “Nature appreciation”, “Sedative outdoor activities”, and “Wellness activities” were highly recognized by mothers. This result could imply that mothers prefer outdoor activities that require relatively low level of physical energy and nature experience even though fathers prefer more active involvement of family members in outdoor physical activities. Disabled children’s gender and age were identified as significant variables influencing differences of preferred leisure travel activities. Families including male disabled children or children from 12 to 15 years old seem to attach high importance activities that require high level of physical energy including “Sports” and “Active outdoor activities”. The results also suggested preferences in certain activity factors was influenced by the nature of their children’s disabilities. Specifically, families that included children with less severe disabilities are more likely to prefer physical outdoor activities and socializing and special events. Finally this study acknowledged that “Sports” and “Wellness activities” are important to the group of respondents who have family income more than 35,001 dollars.

Table 2. Mean Differences of Leisure Travel Activity Factors According to Family Demographic Characteristics

Variables		Activity Factors						
		F1	F2	F3	F4	F5	F6	F7
Role of household	Father	1.73	2.45	2.40	2.14	2.69	2.72	1.24
	Mother	1.42	3.32	2.85	2.60	1.70	3.23	2.27
	Sibling	1.37	3.23	2.49	2.32	2.17	2.82	1.67
	<i>F value</i>	3.52 ^a	11.34 ^b	2.01	.47	3.48 ^a	3.72 ^a	18.25 ^b
Disabled children’s gender	Female	1.33	3.25	2.70	2.25	2.53	3.36	1.87
	Male	1.80	3.09	2.75	2.60	2.42	2.96	2.1
	<i>t value</i>	-3.73 ^a	.52	-.87	-2.19 ^a	1.56	4.38	-2.01
Disabled children’s age	6~11	1.56	3.01	2.92	2.47	2.48	3.17	2.12
	12~15	1.83	3.10	2.66	2.58	2.53	3.01	2.05
	16~19	1.43	3.37	2.62	2.34	2.30	3.15	1.86
	<i>F value</i>	6.18 ^b	4.30 ^a	1.72	.42	2.34	2.17	1.80
Severity of disability	Level 1	1.46	3.23	2.72	2.16	2.21	3.5	1.81
	Level 2	1.88	3.20	2.65	2.5	2.57	3.06	2.23
	Level 3	2.01	3.07	3.17	2.92	3.4	3.05	2.35
	<i>F value</i>	5.67 ^b	.45	1.77	10.40 ^b	8.67 ^b	2.89	1.50
Family income	~ 25,000	1.43	2.53	2.08	2.35	1.96	2.57	1.90
	25,001~35,000	1.74	3.02	2.67	2.40	2.43	3.10	2.08
	35,001 ~	2.38	3.25	2.81	2.54	2.50	3.12	2.60
	<i>F value</i>	9.72 ^b	3.93 ^a	2.04	1.92	.14	.71	5.06 ^b

^a*p* < .05, ^b*p* < .01

What leisure travel activities are frequently engaged by sub-family groups?

In addition to examining frequent activities of leisure travel involving the entire family members and combinations of family members (e.g., parent only, parent and

child), activity data was re-coded based on the responses to “household roles”. Household roles were categorized into parents, non-disabled children, and disabled children. In addition, five combinations of household roles including "all the children", "a parent and child(ren) without disabilities", a parent and child(ren) with disabilities", "a parent and all the children", and "both parents & all the children" were added to the sub-family groups. In total, eight sub-groups were assessed in their activity participation patterns.

The frequency of each activity was obtained to understand the differences between different sub-family groups in the 37 activities. The top ten activities most often engaged in were *church meeting/retreat*, *visiting friends/relatives*, *participating organizations' leisure outings and local events and festivals*, *walking/trails*, *hiking/climbing*, *biking/cycling*, *nature walk*, *visiting scenic landmarks*, and *swimming* (Figure 1). Overall disabled children’s participation in activities was higher than other groups. Most activities were quite popular across diverse sub-family groups although the intra-group rank varied across groups. It also indicates that parents most often engaged in activities within the socializing and special events while children tend to participate in physical activities such as swimming, biking/cycling, hiking/climbing, and walking/trails.

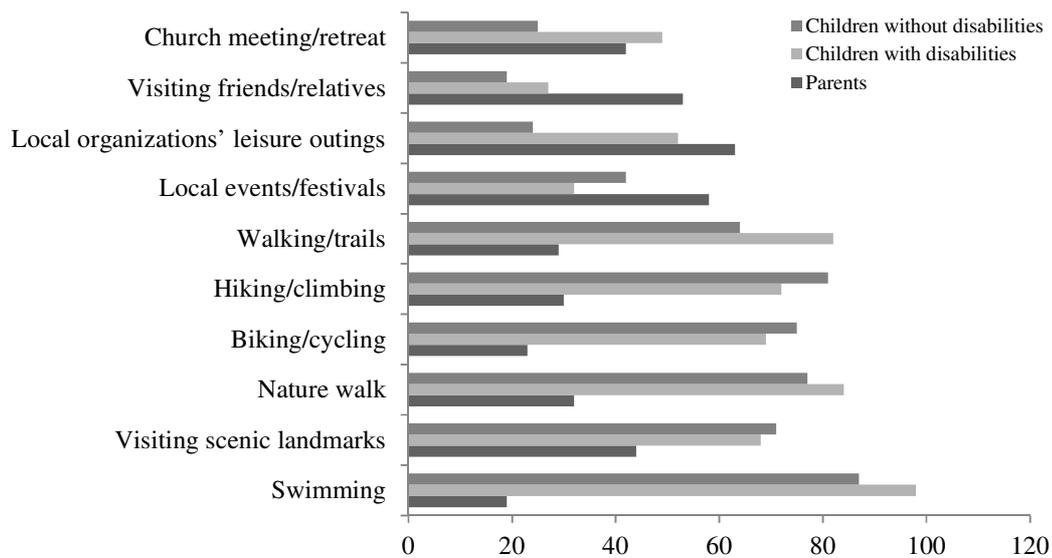


Figure 1. Comparison of Top Ten Family Leisure Activities between Family Members

In order to investigate the variation in frequency of leisure travel activities in relation to patterns of family involvement, top five activities of each sub-family group were identified (Table 3). The frequency of participation in different activities varied depending on who was involved. The results suggested that shared leisure travel in this study was dominated by small group interactions that involved one parent, typically mothers, in activities with all of their children or their child(ren) with a disability. Concentrating on the activities that included a parent and the child(ren) with disabilities, it appeared that they partook more often than any other sub-family groups in socializing pursuits. Additionally, as illustrated in Table 3, frequencies of participation in physical activities such as hiking/climbing, biking/cycling, and fishing differed depending on

whether the parent included the child(ren) with or without disabilities. Overall, small combinations of family members participated with varying frequencies in different patterns of leisure travel activities. Those involving both parents and all the children usually fell within the socializing and special event activities. The popularity of these kinds of activities was unique to situation in which only one parent was involved in leisure travel activities. One parent and all the children, on the other hand, typically took part in physical activities such as swimming, walking/trails, and nature walk.

Table 3. Top Five Leisure Travel Activities Engaged by Sub-family Groups

Rank	All the children	Parent & Disabled children	Parent & non-disabled children	Parent & All the children	Both parents & All the children
1.	Swimming	Local organizations' leisure outings	Swimming	Local organizations' leisure outings	Local organizations' leisure outings
2.	Biking/cycling	Local events/festivals	Hiking/climbing	Swimming	Visiting friends/relatives
3.	Hiking/climbing	Church meeting /retreat	Biking/cycling	Walking/trails	Local events/festivals
4.	Walking/trails	Nature walk	Walking/trails	Nature walk	Church meeting /retreat
5.	Church meeting /retreat	Swimming	Fishing	Church meeting /retreat	Nature walk

DISCUSSIONS AND CONCLUSIONS

The current study sought to present a clearer picture of leisure travel experience for families with disabled children. To provide as much descriptive detail as possible, activities of family leisure travel that included the entire family and those that characterized the interactions of sub-groups within the family were considered. Additionally, selected family (e.g., role of household and family income) and child (e.g., severity of disability) characteristics were explored as potential influences on activities of family leisure travel.

This study notes that various activity factors were identified as an integral part of leisure travel experience for family with disabled children. There are a variety of activities that can help children with developmental disabilities to socialize, express their feelings and stay healthier. Among various types of activity, this study has revealed that the most popular forms of family leisure trip activities are outdoor activities based on natural environment setting and socializing activities. Active involvement of children with disabilities in outdoor activities is important as a means of maintaining and

enhancing physical and mental strength and function (Damiano *et al.*, 2002) and a way to socialize outside the home. In particular, nature appreciation gives family with disabled children a chance to be out in the open air while learning more about the world around them.

Beyond considering the activities “most liked,” another question addressed “which activity” was engaged in “most often” in this study. Apparent response from this question is consistency between activities described as being “most liked” and those that families participated in “most often”. That is, participating in nature based outdoor activities and socializing events occurred most frequently in family leisure trips. These results suggest that marketing efforts emphasizing various types of outdoor activities and socializing events available in a destination should be effective. This also indicates leisure destinations should be in natural settings and should target those travelers who are fond of natural surroundings in terms of promoting potential family tourists with disabled children.

Leisure trip activities involving smaller groups within the family, usually mothers and one or more of the children, focused on physical activities most of the time, but the specific forms were different than those pursued by the family as a whole. For example, participating in socializing activities and special events was more often the activities of choices when all family members participated together while swimming, walking/trails, hiking and climbing were more common when one parent and one or more of the children were involved. Furthermore, this study confirmed that sub-family group including a parent and disabled children is more likely to participate in socializing activities and special events compared to other sub-groups. These findings contribute to understanding the activities that provide the context in which various family groups interact to meet the individual and collective needs of their members. This study suggests that interactions of various combinations of family members in leisure travel activities such as participating local events, festivals, and leisure outings fulfill valued functions in assisting children-particularly those with disabilities-to give opportunities for them to interact other people, enhance family relationship, and acquire socializing skills and interests. Therefore, event organizers and marketers should carefully consider the special needs and choices of families of children with disabilities and provide relevant and meaningful event and programming experiences.

This present study, while exploratory and primarily concerned with generating a foundation for enhancing our understanding of family leisure travel, offered several practical implications for service providers of hospitality and tourism businesses. The approach of this study can potentially provide a framework to help tourism marketers to more accurately pinpoint what factors are important for families of children with disabilities to make favorable decisions to patronize a destination. The results also suggest that participation in certain activities is influenced, in some families, by the nature of their children's disabilities. Specifically, families that included children with more severe disabilities tend to most frequently engage in passive activities while families of children with less severe disabilities took part more frequently active physical outdoor activities. Based on this finding, family leisure travel may not expose children

with more significant levels of disability to a wide range of activities. From a service provider's perspective, this realization points to potentially important considerations in that the nature of an individual's disability may influence choices-the individual's and/or the parents'-about tourism services and facilities.

The overall study results suggested that the activities of greatest interest to the participating families were contingent on whether the family included a child with a disability or not. Consequently, service providers should concentrate on ensuring that quality family tourism services and programs are available and welcome the participation of families that include children with a disability. This affordance can be facilitated by offering and promoting a variety of family leisure tourism products that include a number of activity options, ensuring that services are designed to accommodate a wide range of families that include members of different ages, skill levels, and interests and providing staff who are trained and prepared to support the active involvement of families who may have varying support needs.

This study, although providing useful information related to family leisure travelers with disabled children, has its limitations. First, the families surveyed are mostly families with children of learning and developmental disabilities. Families with other types of disabled children may exhibit different characteristics. A second concern is the limited sample size. As it was a challenge to recruit of participants from a specific group of families, it limits the generalizability of findings to the broader population of family with disabled children. Therefore, it would be useful for future research to incorporate larger samples that comprise a broader cross-section of this group. In addition, it would be useful to investigating any differences for families with and without disabled children could further reveal valuable information.

REFERENCES

- Argyle, M. (1996). *The social psychology of leisure*. London: Penguin.
- Beritelli, P., & Boksberger, P. E. (2005). Activity-based market segmentation: A behavioural approach. *Tourism*, 53(3), 259-266.
- Brey, E. T. & Lehto, X. (2008). Changing family dynamics: a force of change for the family-resort industry?. *International Journal of Hospitality Management*, 27, 241-248.
- Butler, R. W. (1999). Understanding Tourism. In E. L. Jackson & T. L. Burton, *Leisure studies: Prospects for the twenty-first century* (pp. 97-116). State College, PA: Venture Publishing Inc.
- Damiano, D. L., Dodd, K., & Taylor, N. F. (2002). Should we be testing and training muscle strength in cerebral palsy? *Developmental Medicine & Child Neurology*, 44, 68-72.
- Forsyth, R. & Jarvis, S. (2002). Participation in childhood. *Child Care Health Dev*, 28, 277-279.
- Glidden, L. M. (1993). What we do now know about families with children who have developmental disabilities: Questionnaire on resources and stress as a case study. *American Journal on Mental Retardation*, 97(5), 481-495.

- Huff, C., Widmer, M., McCoy, K., & Hill, B. (2003). The influence of challenging outdoor recreation on parent-adolescent communication. *Therapeutic Recreation Journal*, 37(1), 18-37.
- Johnson, H. A., Zabriskie, R. B., & Hill, B. (2006). The contribution of couple leisure involvement, leisure time, and leisure satisfaction to marital satisfaction. *Marriage and Family Review*, 40(1), 69-91
- Kelly, J. (1982). Leisure subcultures. In J. Kelly, Leisure (pp. 240-255). Prentice Hall.
- Kelly, J. R. (1983). Leisure identities and interactions. Winchester, MA: Allen, Ltd.
- Kim, S. J. & Kang, K. A. (2003). Meaning of life for adolescents with a physical disability in Korea. *Journal of Advanced Nursing*, 43(2), 145-155.
- Kim, S. S., Lee, C. K. & Klenosky, D. B. (2003). "The influence of push and pull factors at Korean National Parks". *Tourism Management*, Vol. 24 No. 2, pp. 169-80.
- Kotler, P., Bowen, J., & Makens, J. (1999). Marketing for Hospitality and Tourism. Prentice-Hall, Upper Saddle River, NJ.
- Ku, B.W. (1993). The pride and defense mechanism of disabled people. A Thesis for a Doctorate, Tanguk Graduate School, Seoul.
- Kyun, M.O. (2000). A literature review study about viewpoint for people with disabilities according to history change. *Korea Journal of Special Education*, 35, 107-136.
- Larson, R. W. & Verma, S. (1999). "How Children and Adolescents Spend Time Across the World: Work, Play, and Developmental Opportunities." *Psychological Bulletin*, 125, 701-736.
- Lehto, X., Choi, S., Lin, Y-C., & MacDermid, S. (2009). Vacation and family functioning. *Annals of Tourism Research*, 36(3), 459-479.
- Mactavish, J. B. & Schleien, S. J. (1998). Playing together growing together: Parents' perspectives on the benefits of family recreation in families that include children with developmental disability. *Therapeutic Recreation Journal*, 32, 207-230.
- Mactavish, J. B., & Schleien, S. J. (2004). Re-injecting spontaneity and balance in family life: parents' perspectives on recreation in families that include children with developmental disability. *Journal of Intellectual Disability Research*, 48 (2), 123-141.
- McKercher, B., Packer, T., Yau, M.K., & Lam, P. (2003). Travel agents as facilitators or inhibitors of travel: perceptions of people with disabilities. *Tourism Management*, 24(4), 465-474.
- Morrison, A. M., Hsieh, S., & O'Leary, J. T. (1995). Segmenting the visiting friends and relatives market by holiday activity participation. *The Journal of Tourism Studies*, 6(1), 48-63.
- Moscardo, G., Morrison, A. M., Pearce, P. L., Lang, C., & O'leary, J. T. (1996). Understanding vacation destination choice through travel motivation and activities. *Journal of Vacation Marketing*, 2(2), 109-121.
- Passmore, A. & French, D. (2001). The development and administration of a measure to assess adolescents' participation in leisure activities. *Adolescence*, 36, 67-75.
- Pelchat, D., Ricard, N., Bouchard, J.-M., Perreault, M., Saucier, J.-F., Berthiaume, M., & Bisson, J. (1999). Adaptation of parents in relation to their 6 month old infant's type of disability. *Child: Care, Health and Development*, 25, 377-397.
- Ryan, C. (1994). Leisure and tourism: The application of leisure concepts to tourist behavior: A proposed model. In A. Seaton, (ed.), *Tourism, the State of the Art*

- (pp. 294–307). Chichester: Wiley.
- Schleien, S. & Ray, T. (1997). Leisure education for a quality transition to adulthood. *Journal of Vocational Rehabilitation*, 8, 155-169.
- Shaw, S. M. & Dawson, D. J. (2001). Purposive leisure: Examining parental discourses on family activities. *Leisure Sciences*, 23(4), 217-231.
- Wells, M. S., Widmer, M. A., & McCoy, J. K. (2004). Grubs and grasshoppers: Challenge-based recreation and the collective efficacy of families with at-risk youth. *Family Relations*, 53(3), 326-333.
- Yun, J. & Lehto, X. Y. (2009). Motives and Patterns of Family Reunion Travel. *Journal of Quality Assurance in Hospitality & Tourism*, 10(4), 279-300.

INDUSTRIAL TOURISM AND AGRICULTURAL TOUR IN HOKKAIDO

Its historical uniqueness in Japan and similarity to North America

Etsuko TSUTSUMI

Business and Commerce

Hokkai School of Commerce, Hokkaido, JAPAN

ABSTRACT

As industrial tourism has become more popular, the author would like to introduce some successful cases in Japan for the future promotion of tourism. One example is Tomita Lavender Farm located in Furano, Hokkaido, which was established by a unique entrepreneur. At the beginning he did not see the potential for tourism in this lavender farm. However, he strongly observes his work. As he developed his fragrance business, he inspired neighboring farmers and they followed his example. Now Furano is known for its beauty and for sightseeing. Another case is Machimura Farm, which is owned by a dairy farmer who studied in Wisconsin. It is also now on the tourist trail. Entrepreneurs like the ones mentioned added new value to their areas in the form of increasing tourism.

The author argues that Hokkaido is different from what was described by Ruth Benedict in her book “The Chrysanthemum and the Sword”. Hokkaido society largely consists of migrant people from other parts of Japan, and is not a class society. Management of diversity is important for the creation of new tourism by taking such uniqueness into consideration. Receptiveness and politeness are often cited as typical Japanese trait, and many people are proud of this characterization. However, such simple characterization may not always apply in Hokkaido. This means that managers of the tourist industry in Hokkaido need to have skills in strategic human resource management. They might need to train people differently, e.g. using various manuals and taking more time.

KEYWORDS: *consideration, diversity, entrepreneurship, Hokkaido Japan, human resource management, industrial tourism.*

INTRUCTION

Japan promoted light and heavy industries for the economic recovery after World War II. Tourism, on the other hand, did not receive such attention. Japan's economic bubble

burst in the 1990s and depression followed. Tourism in Japan has recently gained a renewed attention in the context of regional economic revitalization. The government has now positioned tourism as 'one of the pillars of Japanese policy in the 21st century', with the Tourism Nation Promotion Basic Law which came into effect in January 2007. The Japan Tourism Agency was established in October 2008 to function as the hub of creating Tourism Nation. Each region actively promotes its heritage site to be listed on the UNESCO's World Heritage, which currently lists 16 sites in Japan. Agricultural sightseeing tour, as approachable as it may be, has seldom been researched because of the low profit margins. However, agricultural tourism has attracted tourists who seek more than what mass tourism can offer, and they participate in such tours on an individual basis. The amount agricultural tourists spend (e.g. on accommodation and transportation etc) boosts the tourism industry as a whole.

This paper examines agricultural tourism in Hokkaido, where a high proportion of the people are engaged in the agricultural sector. It is believed that this style of tourism has the potential to revitalize the region. Hokkaido, a large island located in the north of Japan, has a unique culture. The author observes that this culture makes them receptive to new ideas from the tourism industry in North America. At the same time Hokkaido has something to influence tourism industry all over the world. This paper looks closely at the successful cases of agricultural sightseeing tourism in Hokkaido. The case studies show that their successes are often the result of each entrepreneur's initiative, operating closely with the local community, in order to open up and introduce a 'sight seen' element into their operation. This means their local agricultural activities have contributed to the promotion of the tourist industry in the region. A conclusion derived from the case studies is that successful agricultural tourism sites don't exist in isolation but form part of a local network and co-operative partnership within the community. This kind of tourism still operates as a niche market. It succeeds when the entrepreneurs form a network and become a part of comprehensible development force in the region.

The author is not eager to advocate the implementation of such agriculture tourism model in the Mainland, because the agricultural sector in Japan is not competitive and is highly regulated by the government. The successful case of the Lavender Farm Tomita may be an exception rather than the norm. Tourism in North America has developed as a part of the self-reliant regional development, and therefore we will be able to learn from their examples.

CASE STUDY 1: FARM TOMITA

The farm is located in the centre of Hokkaido, Furano in Sorachi District. The number of settlers migrating to Hokkaido increased after a piece of legislation called “Undeveloped Hokkaido National Lands Disposal Act” was enacted in 1897. Tokuma Tomita, the first generation of Hokkaido developer, came there as a settler farmer. The family’s attempt to cultivate rice in Hokkaido was not successful because rice had not yet been developed to suit the climate. In 1937, Seiji Soda, the founder of Soda Perfumery, acquired seeds of lavender from France and tested growing them in several regions in Japan. In 1940 he successfully grew lavender in Sapporo, extracted essential oil by distillation for the first time in Japan. Tadao, the grandson of Tokuma, was so impressed by the beauty of the flower he determined to grow. After four years of preparation he started growing lavenders on 5 hectares of land. Hokkaido’s cold and dry climate gives the lavender a deep and mysterious color. Tomita loved the flower and expanded the field to 10 hectares in 1958. His engagement in lavender growing inspired neighboring farmers, who also converted their fields. However, since 1972 when the trade liberalization policy was introduced and synthetic perfume technology had progressed, the price paid by perfume companies had dropped, and many lavender farmers converted to other crops. Tomita resisted the move and kept on growing lavender. When he could no longer support his family by lavender farming, he almost gave up and tried to cut the lavender with a mowing machine. The sound of lavender being squashed sounded to him as if the flowers were screaming, and his wife put her head to the ground and burst into tears. They still could not make up their minds to abandon lavender farming. In the same year, 1976, Japan National Railway used a photo of ‘lavender and train’ in a calendar distributed all over Japan, many were attracted the scenery, and 30 photographers visited the farm to take photos. A woman who accompanied one of the photographers knew a French technique for making lavender sachets and kindly gave her knowledge to Tomita. For the first time Tomita could make profit out of value-added lavender. He gave lavender goods as souvenirs to visiting photographers and when their photos appeared in several magazines, many readers visited his farm as tourists. A scenario writer, Sou Kuramoto, had written a TV drama series called “From the North Country” which had its setting in Furano, and transformed Furano into a tourist destination. In his interview, Tomita told that the first 20 years of his 50 years “lavender engaging life” had been very tough. In the early 1980s, he successfully extracted lavender essential oil and produced a perfume. He also established the Potpourri House and started producing the company’s original lavender goods with his newly acquired cosmetic manufacturer’s license. Tomita produced an

original soap in 1987. He had grown some rice to finance the company, but by this time he stopped and concentrated on the flower growing and making processed goods. In 1990, Farm Tomita's essential oil won the first prize at the "Lavender Perfume Fair" held in France. He received the title of "Monastic Knight of Lavender in Haute Provence", conferred by the Lavender Producers' Association to commend a person's contribution in lavender growing. He also succeeded in growing lavender in green houses during winter. He expanded the business by opening the Tomita Lavender Resource Centre and the Dry Flower House. In June 2008, "Farm Tomita Lavender East" was opened to celebrate the 50th anniversary of the Farm Tomita. A million people visit Farm Tomita annually, and during summer trains stop at the "Lavender Station", a special station, near the farm. Tomita's success has been praised by the people and he was elected to be the Mayor of Naka-Furano. His leadership and accomplishment have inspired the people and in 1999 he received the Hokkaido Industrial Contribution Award.

Furano lavender fields now spread alongside the highway. Other farms also grow lavender and tourists can enjoy a lift and the walk in the fresh air also the view of the Furano. In Kami-Furano, there are six major lavender farms where you can enjoy sightseeing on either the tractor-led observation wheel or helicopter scenic flight. There are many tourist facilities in Biei, the northern part of Kami-Furano, such as the observation wheel built in 2009. In Furano city on Mount Tokachi Shimizu, the Rokka-Tei Restaurant opened in 2010 near the two wine houses and a winery. You can enjoy the fantastical light vision at night during the tourist seasons. There is a hot bath from where you can enjoy lavender viewing. Each lavender farm, though their scale are small, make creative efforts to attract tourists. And so the Furano region survived because of the lavender and tourism, and the patience and determination of those who did not give up.

CASE STUDY 2: MACHIMURA FARM COL, LTD

Machimura Farm is currently located in Ebetsu City close to Sapporo. It was originally located in what is now Ishikari City when Hirotaka Machimura established a farm there in 1917. He studied agriculture at the Sapporo Agricultural School, which later became Hokkaido University. He went to the United States to learn dairy farming practice. In 1906, he left and did not return for 10 years until he had achieved his goal. In the first year in the U.S. he worked as a farm assistant, cleaner of tanks at a pharmaceutical company, and a porter in Seattle. In 1907 he moved to West Allis in the

State of Wisconsin where the natural environment resembles that of Hokkaido, and there he worked as a stockman at a Farm. In his fourth year in U.S. he enrolled in the University of Wisconsin, the faculty of agriculture, dairy farming. Madison, the capital of the state where the University was located, was the centre of the dairy industry, thus the standard of the university and the testing laboratory was of the highest level. After returning to Hokkaido he advocated soil formation, grass growing and cow maintenance. He was seen as a pioneer of modern dairy farming. The farm he opened in Ishikari city was the first one in Japan to introduce American dairy methods. A diary written by Hirotaka while he was in U.S. describing his struggles is still on display at the memorial hall. The farm was re-located to Ebetsu city in 1927, and to the current location in 1992. The farm covers 165 hectares, with 380 cows. It is a popular tourist spot, always crowded with local people and those from other near city wanting to buy its excellent dairy products, especially the ice cream. The popularity of the farm increased visitors to Ebetsu city and became one of the most popular tourist spot. The farm's entrepreneurship was carried on by the current president who introduced a bio-gas plant in 2000.

Consideration

ANALYSIS ON HOKKAIDO

Hokkaido is located in the northernmost region of Japan and is and contains 22% (83,500 square kilometer) of Japanese land, with a population of 5.5 million. It has a history of development by settlers (who were called colonizers) coming from the Mainland, who excluded the indigenous population Ainu. In order to consider agricultural tourism in Hokkaido, it is necessary to outline its history. Hokkaido had been indigenous people, Ainu, and their presence made Hokkaido's regional formation distinct from that of the other areas. As the Ainu were hunters rice farming started after the settlers came. The Ainu respected nature and ate bears, deer, salmon and mountain vegetables only to survive and stocked for winter. They spent winter time decorating their tools and handicrafts. Therefore history of rice cropping in Hokkaido is relatively new. In Japan, the Japanese-English word for "Venture Business" means a business, small when starting but growing bigger and considered as a non-conventional. The concept of venture business usually doesn't include primary industry. Such a view might come from the fact that agriculture has been a highly restricted sector where the barrier to entry is very high and the overall profitability is low. Tomita, however, did not give up the plant of his choice, even as the change of government policy resulted in

sharp fall of profitability to close to zero. Tomita's independent thinking as an entrepreneur made him pursue what he really wanted. If the plant was a leafy green vegetable, the photograph of the scenery wouldn't have so much inspired people to visit. It is true that Tomita's success is attributable to his luck and the things he couldn't even foresee, but his unyielding spirit and bold entrepreneurship was the force that lifted the region as a whole.

Case 2 described Hirotaka Machimura's successful introduction of dairy farming brought from the United States. It was possible because of the special environment of Hokkaido. Hirotaka's father, Kinya, had studied at the Sapporo Agricultural School, and was one of the second graduates. He studied the American style farm management from Edwin Dann who was working at the Hokkaido Development Commission. In a way, Hokkaido was more Westernized compared with the Mainland. Just stepping outside from the Hokkaido Airport, you will see buildings made of bricks or with bright colors. The majority of farms are managed on a large-scale. Farmers often hold a one-day experience course and open up their fields or live stock ranching for visitors. These can be called industrial tours. On the other hand, dairy farmers in the Mainland usually don't have land big enough to open up and invite people. Agricultural tourism on the Mainland is not only hindered by the physical or geographical conditions, but also the mentality. The history of Hokkaido, having invited foreign advisors in the early period of its development, made people welcoming to outsiders, including foreigners and tourists.

DISCUSSION

According to Horoshi Suda, industrial tourism is defined as "sightseeing of industrial plants or their remains with historical or cultural value, or plants fitted with machinery, tools and the latest technology, accompanied by learning or hands-on experience". The Hokkaido government added agriculture to industrial tourism category. The government is promoting agricultural tourism within a framework of industrial tourism by stating that "the agriculture, forestry and fisheries industry is Hokkaido's major industry. As reconciliation and integration with the indigenous people progressed, the indigenous people's culture was well recognized as tourist a resource. For example, the Tillicum Village in Seattle (a reconstructed indigenous island) is a popular tourist attraction. In Vancouver, people admire the totem poles in the parks, and the city is decorated with indigenous arts in a sophisticated way. In these regions in North America, the indigenous cultures and heritage are well recognized. In contrast to the situation

above, Hokkaido the settlers who have their roots in the Mainland, haven't been taught much about the Ainu. Even at the prefectural capital Sapporo's tourist information center, people who work there cannot answer properly when they are asked about the Ainu crafts as souvenirs. As a settler society where history is not well-rooted in the land itself, Hokkaido doesn't accommodate the needs of tourists who are interested in the indigenous arts or who wish to participate in tours to learn the indigenous culture. When people in Hokkaido are asked to introduce themselves, they often mention places in the Mainland where their ancestors came from. The culture in Hokkaido has developed differently from the traditional culture in the other parts of Japan where people lived for many generations in the same place. The government-led industrial development in Hokkaido has not created a clear gap between 'haves' and 'have-nots'. The society is not class-oriented, hierarchical or conventional. Therefore, the theory of Ruth Benedict on Japanese society does not apply Hokkaido. This non-hierarchical society has not given much incentive for people to compete, which is one of the factors in its slow industrial development, including the tourism industry. The fact that the land has been developed by the government, and development projects initiated by the government, made the people highly dependent. The above cases are unique examples of entrepreneur-led business contributing in revitalizing there region and boosting the tourism industry. W. Bygrave, the author of "Entrepreneurship" has shown many cases with entrepreneurs' small but successful business and points out the importance of their functions. It also apply to tour industries.

A common theme between Tomita and Machimura is that they were both engaged in politics in their later lives. Business people and politicians were closer in this period of new industry encouragement policy. Both Tomita and Machimura took up the role as a regional uniter. Recently there is a difference between the people who are respected and those who represent the region. However, in a relatively new place like Hokkaido, entrepreneurs often become politicians. Hirotaka Machimura later became a politician and made efforts to improve the level of Japanese dairy farming to that of America. In 1952 he was commissioned by the government to set out on a tour to inspect peat land improvement projects and land usage in European countries. In 1962 he won the Medal of Blue Ribbon for his contribution to the agricultural industry, including the introduction of the Holstein cow in Japan. Machimura was given an honorable citizenship of the Ebetsu city for his outstanding achievements. Now the Machimura Farm gets reputation and products are approximately 30 % more expensive. Their operation is mainly business people to business people phase. Its focus is not in the tourist farm operation, but the farm is an accessible visitor's attraction. In Hokkaido,

those successful agricultural entrepreneurs became forces to improve the regional economy as a whole, and the well developed enterprises made the region attractive to visitors.

FURTHER CONSIDERATION

Apart from the examples shown in the case studies, Hokkaido is a place with abundant natural resources. The number of tourists therefore is expected to raise, especially those who travel individually. Hospitality plays a bigger role for those individual based tourists than those who participate in mass tour. So the “low hospitality” which is the mentality of Hokkaido people is an issue. According to a survey conducted by the travel section of the Recruit company “Jaran”, (Jaran Travel Accommodation Survey, http://www.recruit.jp/news_data/data/travel_gourmet/20110721.pdf), that Hokkaido is second to Tokyo for the number of people who stay in hotels among all the prefectures, and also the second highest in terms of people’s spending money for tours. (230,000 people answered the questionnaire through the internet and the figure was adjusted by its weight). However, Hokkaido has never ranked within the top 10 for the question of “did you feel the hospitality of the local people?” Hokkaido people should take this situation seriously and search for the solution. Ruth Benedict’s analysis of Japanese in her book “Chrysanthemum and Sword” as having “shame based culture” as opposed to “guilt based culture” of the Western countries. At least until the bursting of the bubble economy, Japan had a unique spirituality. Contrasting to the Western culture based on God and conscience, the Japanese shame based culture makes people consider other people’s view. The positive side of this culture is that people care for what others feel and are therefore considerate. Such culture also fosters modesty and cooperation. Although this kind of stereotyping of Japanese should be avoided, as a person who often travels overseas, I clearly feel the quality of Japanese service industry. Whenever I come back from overseas, I am often realized that Japanese customer service is the best in the world. However, I noticed after moving to Hokkaido that I have difficulty finding such mentality or sensitivity. In a small community in terms of area in the Mainland, consideration and cooperation among people are essential. However, in Hokkaido, the independent spirit based on religion can be observed in those who do not have religion. People here are generally not hospitable by nature. At the beginning I thought my feeling may be groundless, but I found that the Hokkaido government tourist section has already issued “Hokkaido Tourism Hospitality (heartfelt welcome) Movement Advancement Guideline” in 1985 to tackle this issue. The above mentioned survey

shows such an effort hasn't improved the situation. This may be related to their spirituality, which was affected by an education that denies one's identity formation. Ainu people, for example, have culture deeply rooted in the land. Most of the place names are originally Ainu pronunciation to which Chinese characters were substituted. Talking about the tourist resources, there are natural hot springs in Hokkaido and these are usually in the area where the Ainu people's community had located. The Ainu people's racial origin is still debatable amongst the researchers. They have different language without character and is classified into the hunting people instead of an agricultural one. Many tourist spots in Hokkaido have not accommodated this unique culture. Tillicum Village in Seattle is getting popular for tourist. Shiraoi in Hokkaido also has an Ainu village, Ainu dances are periodically shown, and the entrance fee is about 10 US dollars. Surprisingly, many visitors are not Japanese, but foreigners who are interested in culture in Hokkaido. It is one of Korean group tour courses. Many westerners or Caucasians visit individually. Of course Japanese also take tours but ratio comparing population is not high. There used to be a series of stores which an arcade attaches forward to the entrance, selling traditional Ainu handcraft and clothes. The regional government ordered to move for reasons of the end of a contract term. The place is vacant lot and four small makeshift shops selling Ainu souvenirs are built after over one year argument. One Ainu said in an interview that what is created by Ainu is not recognized as handcraft or arts but just souvenir and the government's view is that the few Ainu souvenir shops at the entrance to the park is enough for the visitors. This shows that the Hokkaido people and the government neglect, if not exclude, the very important heritage of the land where they live. However, an entrepreneurial company in the other area is incorporating Ainu village and its culture. In the central east near the Akan Lake, there is an Ainu village called Ainukotan. The major tourist company Tsuruga Resort Group, built a partnership with this village. This place has hot springs with good water quality, and the Resort Group opened a spacious hotel to where tour buses bring visitors. Each day the hotel invites an Ainu elder who gives a talk as a story teller. The hotel is decorated with artworks by Ainu artists. The Tsuruga Resort has successfully accommodated the hot springs and the Ainu people's culture and created an attractive resort. The company group has bought up the surrounding hotels that are not generating profit and built a luxury hotel. In this way the entrepreneur at the company, Mr. Onishi, son of old founder, has transformed the region and revitalized as a tourist destination.

BUTLER MODEL

The Butler's TALC Model(1980) is a model of tourism that represents tourism as the life cycle of a resort. It depicts 6 stages of tourism as follows: 1. Exploration – Small number of visitors attracted, 2. Involvement – Locals see tourism opportunity and develop services, 3. Development – Large companies build hotels and leisure complexes and package holidays, jobs come – advantages and disadvantages, 4. Consolidation – Tourism is now a major part of economy, visitors steady, making jobs secure. Some older hotels become cheaper, less upmarket attracted, rowdiness becomes a problem.,5. Stagnation – The resort becomes unfashionable and numbers of visitors start to decline, businesses change hands and often fail.6. Decline - Visitors prefer other resorts, day trips/weekend main income source. Or rejuvenation – attempts made to modernize the resort and attract new people. As Lagiewski mentioned in “The application of the TALC model: A literature survey”, more case accumulation is expected. The short about above Tsuruga case would be suitable for his model as a mass tour, and the entrepreneurial president tries not to decline and revitalized with Ainu Culture. Applying the Butler Model to Furano, the phase 1 is when the photographers visited the farm and their photos attracted people to visit the farm. Farm Tomita, to meet the demand of such visitors, produced lavender goods. He transformed the farm to accommodate visitors. He created sections where visitors can take photos and erected attractive sign boards. Tourist coaches started to stop by as a part of their route. Even the train stops at “The Lavender Station” during the high seasons. Not only Tomita but Mr. Sou Kuramoto fascinated, he his friend, an owner of Hotel Resort Group, built the Prince Hotel. There are tours first visiting the lavender farms and then staying at the hotel where the new TV drama was shot. These tourist resources of flowers, farms and scenery encouraged people from cities to migrate there and open small restaurants and cafes. These people have a strong desire to protect the scenery and environment. Therefore it is not foreseeable that Furano, by following the Butler Model, will expand its scope and then the popularity declines. The Association for Tourism is now promoting Furano's good quality vegetables and food products as specialty of the region, and such foods are expected to draw many repeat visitors.

About Machimura Farm, a specialty of Ebetsu city is bricks. Including Machimura, there are many brick construction buildings which Japanese people feel exotic. But the city is industrial city has a industrial complex and a major paper company's factory, despite the fact that the city has attractive scenery, including the old-growth forest. Sapporo, bordering Ebetsu, has the Sheraton hotel, but there is no hotel in Ebetsu. When Ebetsu people were surveyed on the tourist attraction they

recommend, many of them listed Machimura and the old-growth forest. The city has a “Development Settler’s Village”, memorial park of settlement period. These are tourist facilities provided to the local people. Here again there is very little display or materials on the Ainu e.

CONCLUSION

Hokkaido, despite its beautiful natural environment, has a tourism industry is less matured, for mass tourism still occupies the centre of the industry and the overall hospitality level is low. This paper has given an historical analysis on the issue and explored the potential of this sector. It appears that the history of indigenous people has been deliberately ignored and the industries are highly dependent on the government. The history of development in Hokkaido has some similarity to North America, where settlers came from Europe to the new land. On the other hand, in Hokkaido the enterprising spirit of the people has been hindered by the high dependency on prefectural government. People is even more conservative compared to that of the Mainland and lacks so-called ‘Japanese’ sensitivity. This situation will be improved when the people of Hokkaido come to recognize and respect diverse culture, especially of its indigenous Ainu people. Those who chose to study at universities in Hokkaido are usually not interested in visiting the Mainland. Exchange programs between the Mainland and universities of Hokkaido (by recognizing each university’s units) will encourage people’s willingness to accept diverse culture and for Hokkaido people to learn hospitality. Meanwhile, the universities in Hokkaido may introduce teaching manuals produced by the Mainland’s good quality training institutions and resembling something like the Ritz-Carlton’s Credo.

The famous Ainu artist Bikki Sunazawa found the roots of his art in the State of British Columbia. His arts are greatly influenced by the region; maybe he can feel native culture there. The arts, the museums, and the native’s park island, all have dynamic force that symbolizes reconciliation with the indigenous people in north America. However in Hokkaido, the indigenous people are not treated with such respect or with such dynamic force. The tourism is a form of pseudo cultural experience and cannot expect truth and authenticity in it all the time. However, unless those engaged in tourism know what the real resources are surrounding them, they might not be able to offer services of good quality.

Japanese society is now shifting from the maturing phase to the declining phase. It is therefore urgent to review the resources each region has and make efforts to

revitalize them. In this context, each region must pursue strategies to maintain in heritage including historic culture.

FOR THE FUTURE OF HOKKAIDO TOURISM

The paper has been shown critical of the situation but there are some improvements. One of them is the framed Ainu embroidery decorating pillar of newly opened underground passage in Sapporo in 2011. It is the first of its kind that has appeared in public space. History classes in elementary schools have not mentioned about the Ainu before but now little being referred in the text. These are encouraging moves and culture is slowly but surely showing progress.

REFERECES

Benedict, R. translated Hasegawa, M(2010), Kiku to Katana 'The Chrysanthemum and the Sword', Kodansha.

Butler, R.W.(1980), The Concept of Tourism Area Cycle Evolution, The Canadian Geographer, 24(1),5-12.

Bygrave, W. Zacharakis. A.(2007), Entrepreneurship, Wiley.

Hokkai Times, (1982), Machimura Kingo den, Hokkai Times Publishing 447, 451-452.

Machimura, N.(2005), Hoshuno Ronri, PHP.

Steinle, C. Schiele, H, Mietzer, Kai, (2010), Interaction, the Innovative Milieu and Porterian Clusters, Network Strategies for Regional Growth, Palgrave Macmillan.

Suda, H., (1999), Kankoh-no Simbunya, Kankoh Sangyo, Kotsushinnbunn-sha.

Tomita, T.,(1993), Watashino Lavender Monogatari, Seibunndoushinnkoushha.

THE QUEST FOR AUTHENTIC EXPERIENCES
IN A SMALL ISLAND DESTINATION

Robertico Croes

Rosen College of Hospitality Management

University of Central Florida, USA

Seung Hyun Lee

Rosen College of Hospitality Management

University of Central Florida, USA

and

Eric D. Olson

Rosen College of Hospitality Management

University of Central Florida, USA

ABSTRACT

The purpose of this study is to explore the meaning of authenticity in the context of a small island destination. The production of ‘authentic’ tourist experiences can affect the interpretation of a tourist of what an ‘authentic’ tourist experience entails thereby impacting the sustainability of the destination. The technique of utilizing the imagery in the platform of showing photographs is used, and community leaders are asked to focus solely on the meaning of authenticity. The destination’s stakeholders’ perspective on the meaning of authenticity is examined, departing from the main stream literature which mainly focuses on the demand side (tourists) of the equation. The meaning of authenticity was classified into natural environment, participants, and identity and culture. Interestingly, the definition of authenticity varied from person to person, and a clear and conscious definition of authenticity could not be agreed upon by the group.

KEY WORDS: Authenticity, Small island destination, Tourism

INTRODUCTION

The purpose of this study is to explore the meaning of authenticity in the context of a small island destination. Authenticity is a concept widely used in tourism policy, strategy and marketing, but its meaning has often been recognized as difficult to assess. The multiplicity of meaning makes its understanding and application in the context of tourists' motivation and the re-creation of an authentic experience at a destination ambiguous at best or futile at worst. From the demand's perspective, authenticity represents visitors' desire to experience and consume diverse past and present cultural landscapes, performances, foods, and participatory activities (Chhabra, Healy, & Sills, 2003). From the supply side, authenticity is looked to as a tool for community economic development and is often actively promoted by local governments and private businesses. And yet, from both sides, there is an increasing interest in the meaning and realization of authentic experiences (Richards & Wilson, 2007).

In particular, authenticity seems to play an increasing relevant role in the sustainability of small island destinations. Small island destinations are struggling to remain unique in an ever increasing trend towards sameness triggered by globalization forces. The reason seems that they cannot grow continually focusing on volume due to resource scarcity and limited market size (Demas, 1986) and the lack of viable alternatives (Winpenny, 1982). In other words, small destinations can't compete on merely having more and more arrivals because they will hit the limit of maximum tourists that they can comprise due to their limited land. Small island destinations are questing for the variety of offerings. The variety of offerings provides small island destinations with the opportunity to continue to increase revenues and consequently can continue to grow economically. For the purpose of this study, smallness is defined as a destination with a population of less than 1.5 million (Croes, 2010). There exists a dearth in the discussion of authenticity in small island destinations. Understanding how authenticity plays out in the production and consumption of tourism in small island destinations could facilitate the upgrading of the product. Consequently, it spurs an increase in spending behavior as the literature indicates that the variety of offerings can induce more spending only if it contains quality and authenticity (Jennings & Nickerson, 2006). This study is a case study of the island of Aruba, located in the Caribbean Sea as presented in Figure 1. Aruba is a mature tourist destination and has been relatively successful in upgrading its tourism product over time (ECLAC, 2007). Recently, the island has embarked on a quest for steering its product towards more authentic experiences. This study aims to explore the meaning of authenticity as it pertains to the specific situation of Aruba.



Figure 1. A Regional Map of Aruba

The study drives several specific contributions to the literature on authenticity. First, it applies a novel technique utilizing imagery of landmarks and entities on the island of Aruba for purposes of identifying authenticity. Photographs used in this study were taken from high-volume tourist areas on the island. Second, it examines the destination's stakeholders' perspective on the meaning on authenticity, departing from the main stream literature which mainly focuses on the demand side (tourists) of the equation.

This study focuses on a specific small island destination, Aruba. Tourism has had a major impact on economic growth, development, and quality of life in Aruba over the last half century. Tourists have been drawn to the small island for its sun, sea, and sand product. However, Aruba appears to be shifting from a volume to a value strategy due to land constraints and a concern for its environment. As the shift occurs, the island will be looking at new and unique product offerings to enhance the tourist experience. Thus, the role of cultural entities, events, and new experiences will play a stronger role in attracting repeat visitors to the island. The concept of authenticity plays into this new creation of added value entities for the tourist and will have implications for product development, tourism planning, and cultural awareness for the island.

LITERATURE REVIEW

Authenticity from a tourism perspective has its roots in cultural authenticity. Some of the earliest studies on authenticity (Graburn, 1983, 1989; MacCannell 1976) focused on tourism as "...viewed as a ritual, a sacred journey, a pilgrimage, and a type of nostalgia" (Wang, 2007, p794.). Today, three strands of defining authenticity from a tourist perspective are found in the literature: the objectivist, the constructionist and the existential authenticity approach (Wang, 1999). The three strands of defining authenticity create a logical flow in progression from object authenticity, perception and feelings

toward the object, and finally, towards self-actualization and complete immersion with the object.

Objective authenticity

Objective authenticity refers to the authenticity of originals (Wang, 1999). The essence of objective authenticity lies in the authenticity of the originality of the object. For example, tourists may see an object in a museum and perceive the object as being authentic. The experience is authentic as long as no one challenges the object or if the object is supported by rich data or fact (Reisinger & Steiner, 2006). However, even though the tourist may see the object as being authentic, the object may actually be not original. MacCannell (1973) refers to this as “staged authenticity.” MacCannell suggests there is a contradiction between the demand of authenticity and the staged experience of the tourism product in terms of feeling and knowledge. This suggests that when tourists are searching for an “authentic experience,” they are merely concerned with the state of authentic “feelings.” Depending on the object the tourist is in contact with, the experience of the tourist may not in fact even be authentic even though the tourist may think the experience is objective. What clearly is defined as authentic by an expert may not be authentic according to the tourist.

Constructive authenticity

Some studies suggest that viewing authenticity as merely as a response to an object is too simplistic; thus, the constructionist viewpoint of authenticity shapes how authenticity is projected onto objects by supply-side producers in terms of “imagery, expectations, preferences, beliefs, and powers” (Wang, p. 352). For example, a visit to Walt Disney World showcases multitudes of cultures and time periods (i.e. Mexican pavilion at Epcot theme park and Frontierland at the Magic Kingdom theme park.) However, tourists perceive that the symbols of architecture, food, dress, music, and landscaping are symbolically authentic when visiting such recreation lands.

In essence, the main point of constructionist authenticity is that tourists are looking for not objective authenticity, but rather symbolic interpretations, which usually does not have to do with reality (Wang, 1999). The context of perception is what distinguishes the constructionist viewpoint from that of the object. In this viewpoint, the role of authenticity has to do with the tourist’s perception of the object. One of the main assumptions in constructivism is that there is not a real world. Reality is best seen as one’s interpretations, and that various meanings can be created by a variety of perspectives (Wang, 1999). It is these perceptions of the setting that shapes one’s viewpoint of authenticity. Thus, authenticity is a project and perception of a tourist’s own beliefs, stereotypes, and expectations (Bruner, 1991; Laxson, 1991; Silver, 1993).

Existential authenticity

Existential authenticity, on the other hand, does not have anything to do with if the object is real or not. Rather, tourists are preoccupied with the notion of “being” which is triggered by tourist activities (Wang, 1999). Essentially, the notion of “being” in the context of tourism has multiple meanings: tourists having a good time (Brown, 1996) as

well as tourists achieving self-realization (Berman, 1970). Feelings and emotions are the direct result of a person experiencing existential authenticity in a tourism platform. In this state, a tourist leaves behind every day stresses of work, family, and life for a complete existential sense. Many tourists choose locations such as sun, sand, and sea in this regard to enter a completely unplanned, yet enhanced environment. The use of the senses seems to be a vital component in this sense, as the tourist becomes completely aware of the sights, sounds, and tastes of its new environment.

The role of imagery in tourism

The use of photographs and imagery as a research tool in tourism has been limited. When studies of photography have been used, the photographs are usually taken by professional photographers for purposes of marketing research, advertisements, and promotional activities (Garrod, 2009). Most photographs used in tourism research have been “found” images (Feighey, 2003). Found images are taken by marketing agencies or other tourism professionals and are usually professional in nature and capture the destination’s major attractions or most beautiful landscapes. While this may be appropriate for marketing purposes, it does raise questions about the role of authenticity in destinations, specifically, the role of everyday interactions that a tourist may come into contact. Moreover, most studies that use imagery in tourism have focused on obtaining the demand side of tourists’ perceptions of the images of the destination (Pike, 2002; Jutla 2000).

Most studies defining authenticity are from a demand tourist perspective (Chhabra, Healy, & Sills, 2003; Kim & Jamal, 2007; Gable & Handler, 1996). In these studies, many are concerned with how a tourist perceives authenticity from their context. While insightful, there is a void in the literature that addresses the role of authenticity in tourism from a supply side perspective. From this perspective, supply stakeholders offer a unique perspective on authenticity in the role of tourism because they are actively involved in decisions made regarding the use of authenticity. Additionally, these stakeholders often play with this concept because of the prestige of the concept of authenticity (Salome, 2010). These stakeholders also have a role to play in the tourism product as destinations continue to create value for its tourism product; such ideas in this regard include museums, cultural events, and heritage sites. In addition, there is currently a dearth of studies that focus on authenticity applied to small island destinations.

The production of ‘authentic’ tourist experiences can, on the one hand, affect the interpretation of a tourist of what an ‘authentic’ tourist experience entails. Tourists define authenticity in the objects observed, in the experienced context or in the search of the self (self-actualization). On the other hand, the host community may also be affected in terms of how it interprets an authentic experience. This process of interpretation could be fraught with multiple interests, needs, ideologies and power relationships. If the meaning of authenticity is not widely shared within the host community it may lead to a lack of the self-identity in the product that is being offered to the tourists, and consequently could erode the quality of the product offered. Most studies depart from the tourists’ perspective regarding authenticity, neglecting the important role played by stakeholders at the destination.

Because of these reasons, this study will focus on the suppliers of authenticity in a small island context.

METHODOLOGY

A focus group methodology was employed to obtain in-depth information describing community members' perceptions of authenticity to be collected (Agar & McDonald 1995; Milman 1993; Morgan 1998). In particular, the focus group explored how local communities describe and define authenticity and how they desire to keep their own identity and to promote their uniqueness to tourists.

In selecting communities for the focus group participants, 15 community leaders and members knowledgeable about the community and culture were invited. The focus group consisted of (1) local artists, (2) members of not-for-profit organizations, (3) other community leaders who were knowledgeable about cultural happenings (e.g. educators) and (4) persons in charge of local tourism events. The focus group was conducted in March, 2011 in Aruba.

Visual texts are representations of ethnographic knowledge, sites of cultural production and the output of both social interaction and individual experience (Pink, 2001). As such, photography can privilege stories of place and culture where the written word would not express enough. Therefore, photographs have become the key medium for our understanding of the world and offer particular perceptions of a society and can create new ways of regarding people and places (Pritchard & Morgan, 2003). Despite the importance of visual texts, qualitative researchers have given little attention to studies using images to enhance their understanding of the social world (Banks, 2001). Although understanding and interpreting visual images can be problematic in terms of the issues such as representation, reflexivity and sampling (Pritchard & Morgan, 2003), it is more the case that "rather than recording reality on ...camera film, the most one can expect is to represent those aspects of experience that are visible" (Pink, 2001).

Two researchers went out to two touristic areas in Aruba to obtain photographs pertaining to authenticity. First, the city of Oranjestad, which is the capital of Aruba, was selected because of its proximity to many areas favored by tourists. In this city center, there are several hotels, restaurants, museums, and shopping areas frequented by tourists as well as locals. Additionally, the cruise terminal is located in this part of this location. The second area selected to capture photographs is known as the "strip," a high density cluster of hotels, restaurants, and shopping areas that is located near the beaches favored by tourists.

The researchers captured digital photographs of products, nature, interactions of tourists, and various buildings that would be typically viewed by a tourist during their visit to the island. A total of 76 photographs were organized in a slide show, and each photograph was labeled with a number. In addition to the 76 photographs, two false photographs were purposely included to see if the participants could consider if the photograph was authentic or inauthentic: one photograph of painting that was created by

an artist in the U.S., and the other photograph of a beach and palm tree that was taken from the Dominican Republic. Examples of photographs are showcased in Figure 2. Two pages of paper were given to participants: the first page included 76 item numbers with an option of choosing yes or no right next to each item, and the second page included a matrix for participants to organize their answers so that they can compare their answers with others.



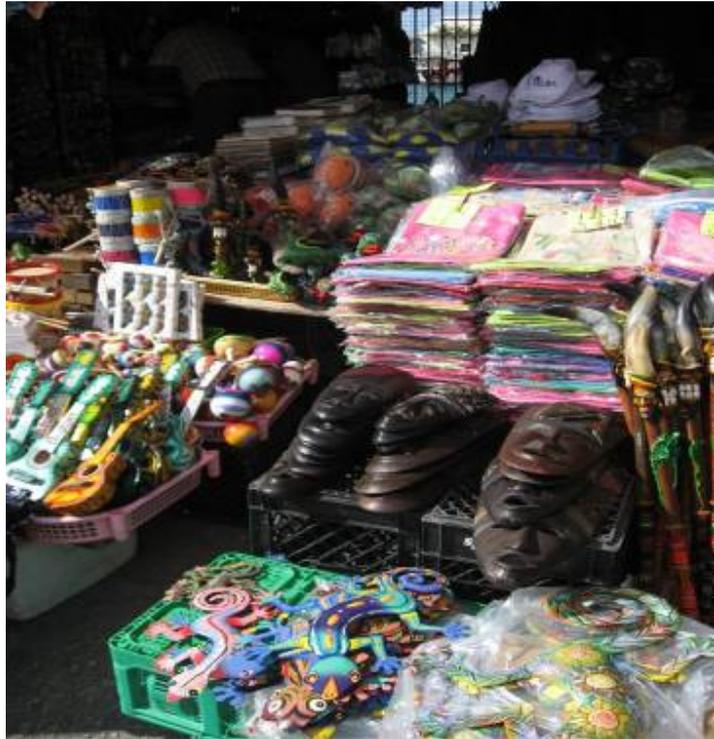


Figure 2. Examples of Photographs

There were specific steps involved to prepare the focus group with local communities as shown in Figure 3. First, during the beginning of the focus group session, each photograph was shown to participants, and they were asked to answer whether the image they saw from the photograph was authentic or inauthentic to them. Photographs were advanced to the next image within two seconds to force participants to answer quickly. Second, participants were asked to organize their answers by listing photograph numbers into authentic or inauthentic box. Third, participants exchanged their answer sheet with another participant to another to compare their answers. Forth, discussion began by sharing similarities and differences of their answers. Finally, the two fake photographs were revealed to the participants.

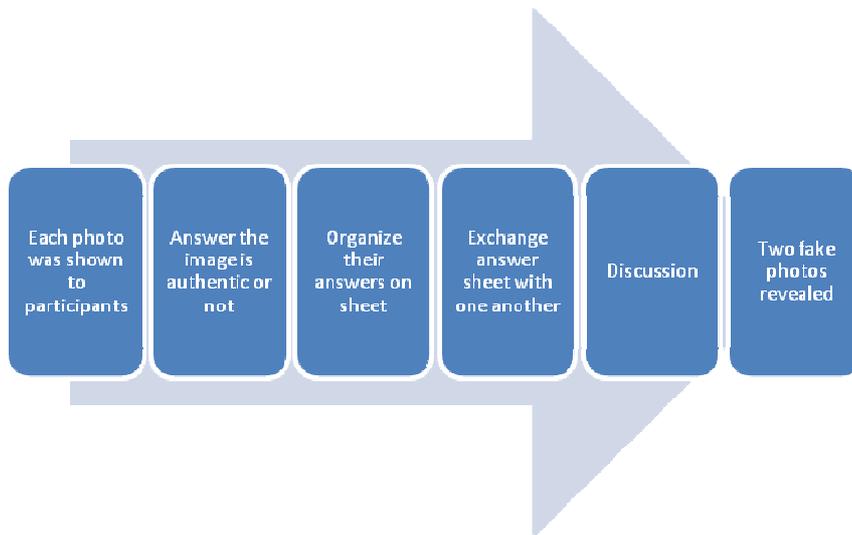


Figure 3. Process of Focus Group

The length of the discussion of the focus group was 60 minutes. The discussion was led by one trained moderator, and two assistant moderators were present during the session to help guarantee reliability and consistency across the focus group. The focus group session was digitally tape recorded. The assistant moderators took notes during the session. Debriefings were conducted and field notes were taken as soon as possible after the focus group.

RESULTS

The participants were extremely interested in the exercise and freely shared their opinions and sentiments. In answering the research question of what constitutes authenticity in small island destinations, the findings are divided into sections in agreement with Lotte Salome (2010)'s analysis of authenticity.

Where? Authenticity of natural environment

Several photographs shown to the participants included photographs of natural environments of Aruba. Photographs of this kind included beach landscapes, palm trees, and animals (e.g. iguana). For many tourists, the importance of natural environments is what draws them to small island destinations like Aruba. The natural landscape of Aruba, primary in the sun, sea, and sand in a desert context is attractive to tourists that visit Aruba. The role of authenticity, however, in this regard, seems unclear. A photograph of Eagle Beach, which is located in Aruba, had mixed results in terms of authenticity by the respondents. Noted by several respondents,

The beach, the palm trees, we are used to having lots of palm trees, so I think that part is really me, when I was younger, so our national emblem has a palm tree. So that is authentic to me.

The white sand, the blue waters. The wooden boat. That's typical Aruba.

For me, a lot of nature is authentic. It's important. We have to get to a point where we can define authenticity, and this time, we can do it.

One respondent, however, had a different perspective, and stated the photograph of the beach landscape was not authentic. The respondent stated,

It could be some island. An island in another hemisphere. A few hours ago, I was swimming, and I saw a similar landscape, except I was actually swimming in the water. It was beautiful. Clean water. Clean skies. Then they put the palm tree there, and I know the palm tree was not from Aruba. They simply put the palm tree there. Everything was so perfect, except the palm tree. I was offended. To me, it was destructive. So seeing this implanted palm tree did not make sense to me.

There are a couple of key findings in how natural environments are perceived by the suppliers. In Aruba, the natural landscapes are extremely important to the Aruban tourist product, and all respondents confirmed the beaches are an important part of the product as well as to the local population. From the focus group, respondents gave vivid details and descriptions of the natural landscape photographs, suggesting that the authenticity of natural environments confirm the existential authenticity approach. This would confirm Wang's observation of a description of the human body at a beach by Lefebvre:

The beach is the only place of enjoyment that the human species has discovered in nature. Thanks to its sensory organs, from the sense of smell and from sexuality to sight (without any special emphasis being placed on the visual sphere), the body tends to behave as a differential field. It behaves, in other words, as a total body, breaking out of the temporal and spatial shell developed in response to labor, to the division of labor, to the localizing of work and the specialization of places. In its tendency, the body asserts itself more (and better) as "subject" and as "object" than as "subjectivity" (in the classical philosophical sense) and as "objectivity" (1991, p. 384).

Several respondents were challenged by the location of the nature scene, specifically the beach photographs. Several respondents stated that although the photograph of a beach and sea scene could have been taken in Aruba, the scene actually could have been from a variety of beach locals throughout the Caribbean and the world. Many respondents appeared to be challenged if the photographs were to be considered authentic to Aruba. When shown a beach and sea photograph, one respondent stated,

...I was at Cuba last year, and I think I saw that there as well.

On several photographs pertaining to nature photographs, the cultural leaders were mixed on their conclusion of authenticity.

Who? Authenticity of participants

As stated, most of the studies on authenticity in the tourism sector focus on the demand side of tourism, specifically the tourists themselves. However, in most interactions, the supply side of participants includes employees, operators, and other

stakeholders that actively participate in the exchange. There were several photographs that were shown to the participants of the focus group that showed tourists interacting with locals during typical hospitality interactions. For example, a street vendor was actively discussing a painting to a tourist. In another photograph, an employee was finishing a transaction in a quick-service food and beverage location with a tourist.

The photograph of the tourist interacting with the local vendor discussing the painting was intriguing to the participants. Many participants wondered if the original painter was from Aruba or if the painting was completed in Aruba. Many participants stated in order for the painting to be authentic, the painter had to be located in Aruba. The subject of the painting also proved to be worth of attention by the participants. Several participants felt that the subject of the painting had to be about Aruba. In this particular photograph, many participants stated the subject of the painting was not Aruban. Thus, from a stakeholder's perspective, the painting was not authentic because the meaning of authenticity seems that the input has to be local without any foreign element. This perspective would align with the constructionist viewpoint of authenticity in the perception regarding what matters most to the suppliers symbolic authenticity. In the discussion, it became clear that what was important was the projection of the symbol of Aruba in the artist context.

How? Authenticity of identity and culture

The increasing opportunities for a tourist to participate in a variety of cultural products in Aruba create an interesting perspective in the role of authenticity. A photograph of a movie theater housed in a traditional style of Aruban architecture was shown to the participants. Although the style of architecture was traditional, the build was a modern building that utilized traces of Aruban architecture. Half of the participants stated the building was authentic. Stated by one participant who agreed the building was authentic:

When you see the image, you immediately will immediately think about the typical row house in Aruba. I thought it was made here in Aruba, by Aruban neighbors. For me, authenticity is something that is made here.

In contrast, half of the participants stated the building was not authentic. Stated by one participant who agreed the building was not authentic:

The building, the design, the function, just because it relates to something, doesn't mean it is authentic. That's why I don't think it is authentic

Noted by several participants,

The building, the architecture has to be real, not just related or pointing to something. My first impression is Las Vegas. I think it's the...trying too hard that breaks down the authenticity.

I'm not sure what year it was built, but to me, I don't think it was part of the history of what made Aruba. I don't know. It doesn't make me feel like Aruba. Aruba is very multi-cultural, but to me, it's just the movies. That's how I see it.

The thoughts by the participants confirm that authenticity can be explained by perceptions and how the object is portrayed onto objects, characteristics of the constructionist perspective. In this viewpoint, what is important is the perception of the object by the supplier. Authenticity, in this perspective, has a large range of meanings derived from the diverse perspectives of the suppliers. One respondent captured this notion,

A lot of what we have been saying has to do with identity, so authenticity is related to identity, and that's why it's so difficult. It's difficult to define, when you listen to what we are saying, we are interpreting a lot...interpret things and then say it's authentic or not. But I'm not sure if that's authentic or not. But I'm not sure if that's interpretation [as] it's very subjective.

DISCUSSION

To investigate the meaning of authenticity in a small island destination and how it relates to the tourist experience from the stakeholders' side, imagery was used as researchers acquired photographs on the island pertaining to "typical" sights an actual tourist would see on the island such as architecture, nature, merchandise, and cultural icons. The stakeholders' ways to view authenticity ran the gamut of the concrete understandings of locality, time, and context and to the reflection through multifaceted and integrated perspectives. The preliminary conclusion from this focus group is that the notions of authenticity are unique and individual, and that an encompassing definition is difficult to concur.

This implies that the meaning of authenticity is often individual in nature with diverse definitions from various stakeholders in tourism. It also implies that these meanings may result in varying and competing definitions in tourism development, product development, and cultural identity. However, the lack of understanding authenticity and identity presents serious long-run problems immediately for small island destinations because they have resource scarcity and limited market size (Demas, 1986) and the lack of viable alternatives (Winpenny, 1982). Perhaps, their future viability depends ultimately on the authenticity and cultural identity.

Because of the varied definitions of authenticity of the suppliers, there should be a clear understanding and agreement among them to come up with implications for small island destinations that wish to use authenticity in its tourism product. A strategy for creating an elaborate process of defining authenticity must be used for suppliers. Such a task would require a slow process to create meaning and consensus among suppliers. The process should involve a high degree of community consensus and cooperation, continuing discussion at all levels of society concerning the benefit-cost sequence of tourism impacts, and significant local control over the visitor industry. By building consensus, however, tourism leaders will be able to effectively define authenticity in regards to its tourism product and could even use these product offerings and authentic experiences as a competitive advantage.

With any research project there are several limitations that need to be addressed. First, the project was limited by the sole opinions and thoughts expressed by only the

participants that were invited to participate in the focus group. This can be limiting in understanding the role of authenticity from a partial perspective. Additionally, another limitation is that this project was limited solely to one small island destination, Aruba. There are several calls for future research regarding the quest for authenticity in small island destinations. This project focused only on suppliers of authenticity in Aruba. The next step in the process would be to compare and contrast these findings specifically with the demand side, or tourists, of Aruba. Because this project focused on only one small island, additional studies could focus on additional small island destinations.

REFERENCES

- Agar, M. & MacDonald, J. (1995). Focus groups and ethnography. *Human Organization*, 54(1), 78-86.
- Banks, M. (2001). *Visual methods in social research*. SAGE Publications, Inc.
- Berman, M. (1970). *The politics of authenticity*. London: George Allen and Unwin.
- Brown, D. (1996). *Genuine fakes*. In the Tourist Image: Myths and Myth Making in Tourism, Tom Selwyn, ed. P. 33-47. Chichester: Wiley.
- Bruner, E.M. (1991). Transformation of self in tourism. *Annals of Tourism Research*, 18, 238-250.
- Chhabra, D., Healy, R., & Sills, E. (2003). Staged authenticity and heritage tourism. *Annals of Tourism Research*, 30(2), 702-719.
- Croes, R. (2010). Measuring and explaining competitiveness in the small island context. *Journal of Travel Research*, 1-12.
- Demas, W. (1965). *The economics of development for small countries*. McGill University, Montreal, 150 pp.
- ECLAC (2007). *Tourism in the Caribbean competitiveness, upgrading, linkages and the role of public private partnership (PPP) and public policy*. CDCC-22/9, LC/CAR/L.151. Port of Spain: ECLAC.
- Feighey, W. (2003). Negative image? Developing the visual in tourism research. *Current Issues in Tourism*, 6(1), 76-85.
- Gable, E., & Handler, R. (1996). After authenticity at an American heritage site. *American Anthropologist*, 98(3), 568-578.
- Garrod, B. (2009). Understanding the relationship between tourism destination and tourist photography. *Journal of Travel Research*, 47, 346-358.
- Graburn, N. (1989). *Tourism: The sacred journey*. In Hosts and Guests: The Anthropology of Tourism, V. Smith, ed., (2nd ed.) 21-37. Philadelphia: University of Pennsylvania Press.
- Graburn, N.H.H. (1983). The anthropology of tourism. *Annals of Tourism Research*, 10(1), 9-33.
- Jennings, G & Nickerson, N.P. (2006). *Quality tourism experiences*. Burlington, MA: Elsevier Butterworth-Heinemann.
- Jutla, R.S. (2000). Visual image of the city: Tourists' versus residents' perceptions of Simla, a hill station in northern India. *Tourism Geographies*, 2(4), 404-420.
- Kim, H., & Jamal, T. (2007). Tourist quest for existential authenticity. *Annals of Tourism Research*, 34(1), 181-207.
- Laxson, J.D. (1991). How we see them: Tourism and Native Americans. *Annals of Tourism Research*, 18, 365-391.

- Lefebvre, H. (1991). *The production of space*. Oxford: Blackwell.
- MacCannell, D. (1976). *The tourist: A new theory of the leisure class*. New York: Schocken.
- MacCannell, D. (1973). Staged Authenticity: Arrangements of Social Space in Tourist Settings. *American Journal of Sociology*, 79, 589-603.
- MacCannell, D. (1976). *The Tourist*. New York: Schocken Books.
- MacCannell, D. (1979). Staged Authenticity: Arrangements of Social Space in Visitor Settings. *American Journal of Sociology*, 79(3):589-603.
- Milman, A. (1993). Maximizing the value of focus group research: Qualitative analysis of consumers' destination choice. *Journal of Travel Research*, 32(20), 61-64.
- Morgan, D.L. (1998). *The focus group guidebook*. London: SAGE Publications, Inc.
- Pike, S. (2002). Destination image analysis: A Review of 142 papers from 1973 to 2000. *Tourism Management*, 23(5), 541-549.
- Pink, S. (2001). More visualizing, more methodologies: On video, reflexivity and qualitative research. *The Sociological Review*, 1-15.
- Pritchard, A. & Morgan, N. (2003). Mythic geographies of representation and identity: Contemporary postcards of Wales. *Tourism and Cultural Change*, 1(2), 111-130.
- Reisinger, Y., & Steiner, C.J. (2006). Reconceptualizing objective authenticity. *Annals of Tourism Research*, 33(1), 65-86.
- Richards & Wilson. (2007). *Tourism, creativity, and development*. Routledge, London.
- Salome, L. (2010). Constructing authenticity in contemporary consumer culture: The case of lifestyle sports, *European Journal for Sport and Society*, 7(1).
- Silver, L. (1993). Marketing authenticity in third world countries. *Annals of Tourism Research*, 20, 302-318.
- Wang, N. (1999). Rethinking authenticity in tourism experience. *Annals of Tourism Research*, 26(2), 349-370.
- Wang, Y. (2007). Customized authenticity begins at home. *Annals of Tourism Research*, 34(3), 789-804.
- Winpenny, J. (1982). Issues in the identification and appraisal of tourism projects in developing countries. *Tourism Management*, 3(4), 218-221.

TOURISM AND HOSPITALITY STUDENTS' PREFERRED LEARNING STYLES IN HIGHER EDUCATION IN TURKEY - WORKING PAPER

Aysun Ates
IDF Bilkent Primary School
Bilkent University, Turkey

Eda Gurel
Tourism and Hotel Management Department
Bilkent University, Turkey

ABSTRACT

Since tourism is one of the largest economic sectors in the world, demand for educated employees is rising (Johanson and Haug, 2008). Consequently, there are a number of studies (such as Dale and Robinson, 2001; Sigala and Baum, 2003) regarding the development of higher education in the tourism and hospitality field (Okumus and Yagci, 2005). However, very few studies have been carried out on tourism and hospitality higher education in developing countries (Ecthner, 1995). Therefore, the purpose of this study is to fill this gap in literature by investigating tourism and hospitality students' preferred learning styles in higher education in the hope that the findings of the study could help in curriculum development in Turkey. We incorporated two famous learning style inventories for this purpose; Kolb's Learning Style Inventory (LSI) and Felder and Solomon's Index of Learning Styles (ILS).

According to Tribe (2002), to develop tourism of the future, today's graduates should have skills that include both liberal and vocational action and be liberally and vocationally reflective. This will help them to meet the needs of the industry and be philosophical enough to understand the complexity of the tourism world. He names these graduates as "philosophical practitioners". If the aim of tourism and hospitality education is to develop "philosophical practitioners", this research can provide direction and guidance on how the content of the curriculum should be modified in Turkey. In this regard, we believe that it is important to study learning styles of students within a specific context.

KEYWORDS: curriculum development, learning styles, Turkey.

INTRODUCTION

Since tourism is one of the largest economic sectors in the world, demand for educated employees is rising (Johanson and Haug, 2008). Consequently, there are a number of studies (such as Dale and Robinson, 2001; Sigala and Baum, 2003) regarding the development of higher education in the tourism and hospitality field (Okumus and Yagci, 2005). However, very few studies have been carried out on tourism and hospitality higher education in developing countries (Ecthner, 1995). Therefore, the aim of this study is to fill this gap in literature by investigating tourism

and hospitality students' preferred learning styles in higher education in Turkey in the hope that the findings of the study could help in curriculum development.

Although modernization of universities in Turkey started in 1931, the changes that established the foundation of today's universities happened in 1981 as the higher education system in Turkey was comprehensively reorganized. With the help of this restructuring, all institutions of higher education were designed as universities under the Council of Higher Education. Access to higher education was centralized and a central university entrance exam was introduced. Non-profit foundations were allowed to establish private higher education institutions (Mizikaci, 2006). Currently, there are 154 higher education institutions, of which 102 are public and 52 are private universities, as well as nine private Vocational Schools of Higher Education (YOK, 2010). Turkish higher educational institutions have taken their basic characteristics from both Continental European and the Anglo-American models (Mizikaci, 2006).

At the higher educational level, first tourism education was offered in 1965 with the Commerce and Tourism Teachers School in Ankara. The main objective of the school was to provide teachers for the secondary-level commerce and tourism schools. With the rapid growth of tourism in the early 1980s in Turkey, the number of associate, bachelor, and postgraduate degree programs has risen. However, there have been major problems and challenges. These may be identified as the lack of qualified academic staff, improperly designed curricula, limited practical training opportunities for students, and difficulties in keeping qualified graduates in the industry (Okumus and Yagci, 2005). Focusing on the problems in curriculum development, in this study, we aim to investigate students' preferred learning styles. Accordingly, we intend to offer suggestions to modify and develop the content of the curriculum. As learning styles are important for how and what students learn, content of the curriculum is essential and therefore lies at the heart of education (Johanson and Haug, 2008).

However, in literature, there is debate on what the content of a tourism and hospitality curriculum should include. Indeed, there is lack of agreement on the content of tourism programs (Airey and Johnson, 1999). Current programs around the world focus either on vocational and practical studies, or they are too theoretical and liberal (Johanson and Haug, 2008). According to Tribe (2002), to develop tourism of the future, today's graduates should have skills that include both liberal and vocational action and be liberally and vocationally reflective. This will help them to meet the needs of the industry and be philosophical enough to understand the complexity of the tourism world. He names these graduates as "philosophical practitioners". If the aim of tourism and hospitality education is to develop "philosophical practitioners", this research can provide direction and guidance on how the content of the curriculum should be modified in Turkey. Since, learning styles differ not only by age, strategies, educational background, different situations, but also by culture (Johanson and Haug, 2008), it is important to study learning styles of students within a specific context.

LITERATURE REVIEW

Different learning styles models

Learning style or preference may be defined as the manner in which a student prefers to learn (Scott and Koch, 2010). In literature, there are three well-known learning style models; Kolb's (1984) experiential learning theory, Honey and Mumford's typology of learning styles, Felder and Silverman's (1988) learning style model. While Kolb's theory is one of the most influential and commonly used models in higher education, Felder and Silverman's model aims to capture learning differences among engineering students. Honey and Mumford, on the other hand, offer a similar model to Kolb's. In the following section, these three models will be explained in detail.

By examining developments in theory and research on experiential learning, Kolb and Kolb (2005) explore experiential learning in higher education. They aim to "present principles for the enhancement of experimental learning in higher education and suggest how experimental learning can be applied throughout the educational development by institutional development programs that include longitudinal outcome assessment, curriculum development, student development, and faculty development" with their model. They use the concept of learning space as a framework to understand the student learning styles (Kolb and Kolb, 2005, p 193). According to Price (2004), Kolb's model is one of the most frequently used learning style models to understand how and in what way learners prefer to learn (Scott and Koch, 2010).

In order to assess learning styles, Kolb offered the Learning Style Inventory (LSI). Kolb's LSI was first created in 1969. It was a part of Massachusetts Institute of Technology's curriculum development project (Kolb, Rubin, and McIntyre 1971). It aimed to help learners understand the process of experiential learning and their preferences in the learning process. LSI is a self-descriptive test that can be used to understand the individual differences in learning. Both educators and learners can create the most suitable environment based on their learning styles. Indeed, a faculty training program was initiated at Brigham Young University in 1989 based on Kolb's LSI (Harb, Durrant, and Teny, 1993).

According to LSI, there are four stages of learning including Concrete Experience (CE), Reflective Observation (RO), Abstract Conceptualization (AC), and Active Experimentation (AE) (Kolb, 2005). The best learning occurs when a learner goes through all four stages of the LSI cycle (Kolb, 1984). Kolb (2005) says that in the learning cycle 'the learner touches all bases.' In Concrete Experience, learners prefer learning through some specific experiences. They enjoy being with people and are sensitive to them. In Reflective Observation, learners prefer learning through observation. They prefer to consider all aspects of a problem before making any decisions. They view issues from different perspectives. In Abstract Conceptualization, learners prefer to learn by thinking, analyzing and planning systematically. They act based on intellectual comprehension. Finally, in Active Experimentation, learners prefer to learn by doing. As they are risk takers, through their actions they like to influence people (Kolb, 2007; Scott and Koch, 2010). Each of these learning stages or models is the four phases of the learning cycle. When students cycle through these four phases, according to Kolb, effective learning takes place (Scott and Koch, 2010).

Kolb's four learning styles are linked to four different learning preferences: diverging, assimilating, converging, and accommodating. CE and RO are the

dominant learning abilities in diverging style. Learners with these abilities are able to see the things from different points of view. They are open-minded and curious about other cultures and people. Receiving personalized feedback and working with others are preferred for these learners in their learning process. AC and RO are the dominant learning abilities in assimilating style. Learners with these abilities prefer to focus on abstract concepts and ideas rather than people. Gathering information, analyzing, and combining are all important for them. AC and AE are the dominant learning abilities in converging style. Learners with these abilities are interested in technical rather than social issues. They are good at solving problems, finding solutions, making decisions, and being practical. CE and AE are the dominant learning abilities in accommodating style. Learners with these abilities learn better with the help of “hands-on” activities. They like being challenged and experience rather than doing logical analysis. These learners prefer to work in groups to be able to finish their tasks (Kolb and Kolb, 2005). According to Kolb, although every individual has a preferred learning style to grasp and transform the information, he/she uses each of the learning models to some extent. In different learning situations, the effective learner uses each of the four styles rather than relying on his/her preferred style (Platsidou and Metallidou, 2009). According to Kolb, students’ learning style preferences and information processing strategies can change and therefore ‘reflective practitioners’ can be developed (Lashley and Barron, 2006).

Although Kolb’s model is widely used, it has been criticized for logical inconsistencies in the theory construction. However, in their study, Marshall and Merrit (1986) found that Kolb’s learning styles are highly reliable and construct validity of the dimensions of the LSI was acceptable. Researchers also reported that the internal consistency and test retest stability of the instrument were acceptable (Pickworth and Schoeman, 2000). Still, the validity of the instrument was described as fair by Curry (1991) (Platsidou and Metallidou, 2009).

Based on Kolb’s theoretical perspective, Honey and Mumford (1982) offered four different styles for use with a population of middle/senior managers in business. Similar to Kolb’s, these styles emerge from the interaction of two dimensions in which the first deals with learning preferences in an abstract or concrete manner and the second deals with learning through active experience or from reflection. Accordingly, the model produces four different learning style preferences. In order to measure these four different learning styles, the authors developed an instrument called Learning Styles Questionnaire. With the help of this instrument, students are classified as Activists, Reflectors, Theorists and Pragmatists (Lashley and Barron, 2006).

Activists are doers. They learn through their own experiences. They like to involve themselves in new practices. They act first and consider consequences later. They are also open-minded and flexible. However, they appear to be easily bored. Reflectors are reviewers and like to learn through processing information from experiences and observations. Therefore, they are more cautious and thoughtful. They prefer to stand back and observe. As they like to collect and analyze data, they are slow to come to a conclusion. They also use information to see the big picture. Theorists like to conclude. They learn through connecting information. They like to integrate their observations into logical models. Accordingly, they use logic to solve problems and value rationality and objectivity. They are keen on using basic

assumptions, principles, theories and models. Pragmatists are planners. They learn through putting ideas, theories and techniques into practice. They like to search for new ideas and experiment. They are practical, quick to act and confident with their own ideas. However, they get impatient from endless discussions (Barron and Watson, 2006; Honey and Mumford, 2011).

As Lashley and Barron (2006) state, although the predictive validity of the Honey and Mumford's instrument may be questioned, it has better reliability and face validity compared to Kolb's. In addition, it provides valuable insight into student learning differences which have resulted in teaching and learning strategies that encourage reflection. The instrument has been used and acknowledged as a useful tool by researchers such as Barron and Watson (2006) and Lashley and Barron (2006) in assessing learning style preferences of hospitality and tourism students.

Felder and Silverman's (1988) learning style model was first applied to engineering education to understand the most important learning style differences among engineering students. The purpose was to provide a good basis for engineering instructors to formulate a teaching approach to be able to meet the learning needs of all students. Indeed, Sharp (2003) offers an instructional module based on the Felder-Silverman's model not only to make students aware of differences in learning styles but also how they may affect personal interactions, teamwork, interactions with professors, and learning difficulties and successes.

The Felder and Silverman's model categorizes learners' preferences based on the type and mode of information perception (sensory or intuitive), the type of sensory information (visual or verbal), the approaches for the information processing (actively or reflectively), and the rate at which student's progress towards understanding (sequentially or globally). By using this model individuals are classified based on their preference for one or the other scale. Sensing individuals are concrete thinkers and they are practical and oriented towards facts and procedures, whereas intuitive individuals are abstract thinkers and they are innovative and oriented towards theories and underlying meanings. As far as the type of the sensory information is concerned, visual individuals prefer visual representations of presented material through pictures, diagrams, and flow charts. On the other pole, verbal individuals prefer written and spoken explanations. Actives learn by trying things out and they enjoy working in groups, while reflective individuals learn by thinking and prefer working alone or with a single familiar partner. Sequential individuals, on the other hand, have a linear thinking process and learn in small incremental steps, whereas global learners have holistic thinking process and learn in large leaps. According to this model, the learners' preference for each scale may be strong, moderate, or mild. In addition, this preference may change with time and vary from one subject or learning environment to another (Platsidou and Metallidou, 2009).

In order to measure students' learning styles based on the four scales, Felder and Solomon (1999) developed The Index of Learning Styles (ILS). This tool has forty-four-items with forced-choices. According to the researchers, ILS meets or exceeds accepted reliability standards. The instrument also has convergent and divergent validity (Felder and Brent, 2005). However, researchers agree on the fact that more research is required to assess especially the reliability of this instrument. In the research studies that have utilized ILS, it was reported that a student might adopt

different learning approaches in different courses and for different topics in a single course. As Felder and Brent (2005, p.57) stated “The problem is that no two students are alike. They have different backgrounds, strengths and weaknesses, interests, ambitions, senses of responsibility, levels of motivation, and approaches to studying.” ILS may be a very useful tool to assess the relative strengths of learning preferences within an individual. However, it may not be suitable for comparing learning style preferences among individuals (Platsidou and Metallidou, 2009).

Learning style preferences of tourism and hospitality management students

A number of studies have been undertaken to identify the learning preferences of students studying tourism and hospitality in the UK, US, Asia, and Australia. In the UK, Lashley (1999) found that the vast majority of students enjoy practical activities and are less comfortable with theorizing and reflection. Therefore, they prefer to learn most easily from activities involving group work that is exciting and challenging. In contrast, students in Hong Kong, Singapore and Taiwan, display preferences for reflector learning styles. Thus, these students prefer to learn by observing and enjoy having a chance to think before acting. They prefer to have the opportunity to research before an activity and think about what they have learned (Wong, Pine, and Tsang, 2000). According to Chan (1999), Chinese history and Confusion Philosophy has a major role on the learning preferences of Chinese students.

However, Barron (2004) and Barron and Arcodia (2002) found that, in Australia, those students with a Confusion cultural background prefer activist learning styles. Authors suggest that such students learning preferences change when they study at a western university, as most western universities encourage more of a short-term, activist kind of learning (Barron and Watson, 2006).

Comparing students in Scotland and Australia, Barron and Watson (2006) found that while Scottish students’ most preferred learning style is reflector learning, this is the least preferred for the Australian students. These researchers also report differences in learning styles based on gender in both Scottish and Australian students.

Recently, Johanson and Haug (2008) compared the learning style preferences of first, second and third year students in tourism and hospitality programs in Norway and observed that students in different classes differ with respect to their learning preferences. Students change their preferred learning styles in line with the content of the curriculum.

METHODOLOGY

This research will follow a qualitative research methodology. Personal interviews with 15 tourism and hospitality management students of a well-known hotel school in Turkey will be conducted. Participants will be asked to answer questions regarding their preferred learning styles based on Kolb’s Learning Style Model, Honey and Mumford’s Learning Styles Questionnaire and Felder and Silverman’s Learning Style Model. Based on the research findings, insight will be

gathered in the direction to develop curricula in tourism and hospitality in Turkey. The findings of this study will be presented at the conference.

CONCLUSION

Research findings suggest that teaching students according to their learning style does influence their learning (Scott and Koch, 2010). Although individualized approaches to learning can have considerable impacts on learning, in order to improve learning, more research is required on the successful strategies and approaches (Evans and Sadler-Smith, 2006). If instructors and educators adopt their teaching styles according to students' learning needs and styles, students may have better chance to learn. We believe in the importance of preparing the curricula, books, and other materials that would suit the learning styles of students.

As Felder (1993, p. 290) quoted from Tobbia, "They are not dumb, they are different." As educators, we need to understand the differences between learners and teach them accordingly. This research is important in the sense that since it aims to understand the learning style preferences of Turkish tourism students, it may provide guidance and suggestions for those who formulate educational policy in tourism higher education in Turkey.

If the aim of tourism education is to create philosophical practitioners, as educators, first we need to understand the students' preferences on learning and then move them into styles that are more reflective and theoretical. As stated by Johanson and Haug (2008, p.28), in this way, "the students will then be able look at tourism not only from a business point of view, but also from perspectives of anthropology, sociology, the environment and philosophy". Accordingly, the curriculum should range from practical to theoretical subjects. The main idea is integrating vocational education with reflection.

References

- Airey, D., & Johnson, S. (1999). The Content of Tourism Degree Courses in the UK. *Tourism Management*, 20, 229-235.
- Barron, P. E. (2004). An evaluation of learning styles, learning issues and learning problems of Confusion heritage culture students studying hospitality and tourism management in Australia. Unpublished PhD Thesis. Brisbane: The University of Queensland.
- Barron, P. E., & Arcodia, C. (2002). Linking Learning Style Preferences and Ethnicity: International Students Studying Hospitality and Tourism Management in Australia. *Journal of Hospitality, Leisure, Sport, and Tourism Education*. 1(2): 1-13.
- Barron, P., & Watson, S. (2006). Hospitality Students Learning Styles: The Impact of Gender and Nationality. *Tourism*, 54(4), 367-374.
- Chan, S. (1999). The Chinese Learner – A Question of Style. *Education and Training*, 41(6-7), 204-305.
- Curry, L. (1991). Patterns of Learning Styles across Selected Medical Specialties. *Educational Psychology*, 11, 247-249.
- Dale, C., & Robinson, N. (2001). The Theming of Tourism Education: A Three-Domain Approach. *International Journal of Contemporary Hospitality*

- Management*, 13(1), 30-34.
- Echtner, C. (1995). Tourism Education in Developing Nations: A Three-pronged Approach. *Tourism Recreation Research*, 20(2), 32-41.
- Evans, C., & Sadler-Smith, E. (2006). Learning Styles in Education and Training: Problems, Politicization and Potential. *Education + Training*, 48(2/3), 77-83.
- Felder, R. M. (1993). Reaching the Second Tier-learning and Teaching Styles in College Science Education. *Journal of College Science Teaching*, 23(5), 286-290.
- Felder, R. M., & Brent, R. (2005). Understanding Student Differences. *Journal of Engineering Education*, 94(1), 57-72.
- Felder, R. M., & Silverman, L. K. (1988). Learning and Teaching Styles in Engineering Education. *Engineering Education*, 78(7), 674-681.
- Felder, R.M., & Solomon, B. A. (1999). *Index of Learning Styles Questionnaire*. Retrieved June 8, 2011, from <http://www.engr.ncsu.edu/>
- Harb, J.N., Durrant, S.O. & Teny, R.E. (1993). Use of the Kolb Learning Cycle and the 4MAT System in Engineering Education, *Journal of Engineering Education*. 82(2), 70-77.
- Honey, P & Mumford, A. (1982). *The Manual of Learning Styles*. Maidenhead, UK, Peter Honey Publications.
- Honey, P. & Mumford, A. (2011). *Learning Style Questionnaire*. Retrieved June 8, 2011, from <http://www.mftrou.com/honey-mumford.html>
- Johanson, L. & Haug, B. (2008). Students' Preferred Learning Styles and the Importance of Curriculum Content: A Study of Norwegian Tourism and Hospitality Students. *Journal of Hospitality and Tourism Education*, 20(2), 23-33.
- Kolb, D. A. (2005). *Kolb Learning Style Inventory*. USA: Hay Group Transforming Learning.
- Kolb, D. A. (2007). *Learning Style Inventory (Version 3.1. edition)*. USA: Hay Group Transforming Learning.
- Kolb, D. A., Rubin, I. M., & McIntyre, J. (Eds., 1971). *Organizational Psychology: An Experiential Approach*. Englewood Cliffs, NJ: Prentice Hall.
- Lashley, C. (1999). On Making Silk Purses: Developing Reflective Practitioners in Hospitality Management Education. *International Journal of Contemporary Hospitality Management*, 11(4), 180-185.
- Lashley, C. & Barron, P. (2006). The Learning Style Preferences of Hospitality and Tourism students: Observations from an International and Cross-Cultural study. *International Journal of Hospitality Management*, 25, 552-569.
- Marshall, J.C., & Merritt, S. L. (1986). Reliability and Construct Validity of the Learning Style Questionnaire. *Educational and Psychology Measurement*, 46(1), 257-262.
- Mizikaci, F. (2006). *Higher Education in Turkey*. UNESCO-CEBES Monographs on Higher Education: UNESCO.
- Okumus, F., & Yagci, O. (2005). Tourism Higher Education in Turkey. *Journal of Teaching in Travel and Tourism*, 5(1/2), 89-116.
- Pickworth, G. E., & Schoeman, W. J. (2000). The Psychometric Properties of the Learning Style Inventory and the Learning Style Questionnaire: Two Normative Measures of Learning Styles, *South African Journal of Psychology*, 2 (30), 44-53.
- Platsidou, M., & Metallidou, P. (2009). Validity and Reliability Issues of Two Learning Style Inventories in a Greek Sample: Kolb's Learning Style

- Inventory and Felder & Solomon's Index of Learning Styles. *International Journal of Teaching and Learning in Higher Education*, 20 (3), 324-335.
- Sharp, J.E. (2003). A Resource for Teaching a Learning Styles / Teamwork Module with the Soloman-Felder Index of Learning Styles. *Proceedings, 2003 Frontiers in Education Conference*.
- Scott, S., & Koch, D. (2010). Teaching University-level Technology Students via the Learner Preferences and Problem-solving Approach. *The Journal of Technology Studies*, 36(1), 16-23.
- Sigala, M., & Baum, T. (2003). Trends and Issues in Tourism and Hospitality Higher Education: Visioning the Future. *Tourism and Hospitality Research*, 4(4), 367-376.
- Tribe, J. (2002). The Philosophical Practitioner. *Annals of Tourism Research*, 3, 442-448.
- Wong, K. K. F., Pine, R. J., & Tsang, N. (2000). Learning Style Preferences and Implications for Training Programs in the Hospitality and Tourism Industry. *Journal of Hospitality and Tourism Education*, 12(2), 32-40.
- YOK Ulusal Tez Merkezi. (2010). Retrieved 10 March, 2011, from <http://www.yok.gov.tr/en/>

EFFECTS OF PSYCHOLOGICAL OWNERSHIP
ON STUDENTS' COMMITMENT AND SATISFACTION

Lisa Slevitch
Hotel and Restaurant Administration Department
Oklahoma State University, USA

Vahagn Asatryan
Department of Business
Redeemer University College, Canada

Abstract

This study applies Psychological Ownership theory (Pierce, Kostova, & Dirks, 2003) in an attempt to explain the complexity of factors influencing students' satisfaction and commitments toward their programs. The proposed framework evaluates psychological ownership through the following antecedents: perceived control, sense of belonging, student involvement, and identification. The sample includes students from four hospitality programs in the United States. The relationship between psychological ownership and satisfaction and commitment are tested applying structural equation modeling method. The results provide new knowledge about affective and psychological factors that contribute to students' satisfaction and commitment.

Key Words

Psychological ownership, student involvement, satisfaction, commitment

INTRODUCTION

Students' satisfaction and commitment issues have gained a significant attention in the recent decades in higher education, as they play substantial roles in enrollment and retention management as well as securing approval from accrediting bodies (Kuh, 2001). The matters of student satisfaction and commitment appear to be complex, and previous studies revealed several key constructs affecting those outcomes (Astin, 1984; Bean, 1983; Strauss & Volkwein, 2004; Tinto, 1975).

For example, the interactionist theory (Tinto, 1975) posits that the degree of students' social and academic interaction within the institution positively affects college retention. Tinto's (1993) model has been widely used, and the author suggests that students' academic and social integration into the institution's community plays an important role in student commitment and retention. However, the empirical evidence in the area has often been inconsistent, especially across institutions of different sizes (Strauss & Volkwein, 2004).

The organizational approach, popularized by Bean (1983; 1990), states the effects of various organizational attributes, such as participation in organization's decision making processes, have significant impact on organizational retention and commitment. Braxton and Brier (1989) attempted to meld the interactionist and organizational approaches into one expanded model; however, their results were empirically inconsistent. Consequently, Jackson and Kile (2004) call for a new research effort to expand and improve the existing models and

tackle the inconsistency of findings. Similarly, Gursoy and Swan (2004) state that new research is needed to understand students' involvement and commitment toward their academic program.

To address the gap specified in previous studies on the topic, the current study applies the theory of *Psychological Ownership* (PO) (Pierce, Kostova, & Dirks, 2003) and examines a new conceptual framework that specifies factors affecting students' commitment and satisfaction. Specifically, this study will investigate the effects of affective and psychological variables of student PO and its effects on satisfaction and commitment toward an academic institution.

THEORETICAL UNDERPINNINGS

The PO theory states that three human motives of efficacy and effectance, self-identity, and having a place constitute the source of PO – “a state in which individuals feel as though the target of ownership or a piece of that target is 'theirs'” (Pierce et al., 2003, p. 86). The target may be both a physical and non-physical entity. The PO theory has been applied in variety of settings, such as restaurants (Asatryan & Oh, 2008), clinical information systems (Pare, Sicotte, & Jacques, 2006), or student group projects (Wood, 2003). Consequently, the authors of the current study define student PO as a state in which students feel as though the academic program in which they are enrolled is 'theirs'.

PO antecedents

Several previous studies point on possible antecedents that might be positively associated with PO (Astin, 1984; Asatryan & Oh, 2008; Perry, Hladkyj, Pekrun, & Pelletier, 2001; Van Raaij & Pruyn, 1998). For example, Asatryan and Oh (2008) provide evidence of a positive relationship between customer participation, customer-company identification, and sense of belonging and PO in the context of the restaurant industry. Hence, the following section identifies the proposed antecedents of PO and defines the nature of their interrelationships in the context of the present study.

Student involvement has often been described as a key variable of student success in theories of higher education (Astin, 1993). Astin (1984) defines it as a psychological and physical energy that students spend on academic experience, as he elevates the prominence of this concept in his developmental theory of higher education. Astin suggests a continuous nature of the concept of student involvement, including both quantitative (hours spent studying) and qualitative aspects (comprehension of the academic material). More importantly, Astin proposes a positive relationship between the amount and the quality of student involvement and student learning.

Additionally, past research has shown evidence of a positive relationship between student involvement and persistence variables. Mallinckrodt and Sedlacek (1987) suggest that greater involvement in campus activities was positively related to student-institution identification and higher rates of retention among African American students. Also, student involvement appears to play a significant role in student withdrawal decision-making. All the mentioned above outcomes are relevant to PO. Thus, it can be proposed that higher levels of involvement or investment of the self into the PO target lead to stronger feelings of possessiveness or PO.

H1: *Student involvement is positively related to PO.*

Perceived control is the ability to intentionally influence environmental, psychological, and behavioral events (Pierce, et al., 2003). It is often described as feelings of control over the external environment that arise from the efficacy motive. Bandura (1977) suggests that

effectance is a common human need to feel capable to change the environment and interact with its elements. Possessions, as elements of the extended self, satisfy that need for effectance. In the context of current study, students' perceived control refers to the degree to which they perceive that they are able to influence the educational process and outcome (Van Raaij & Pruyn, 1998).

A number of studies connect control with what makes students' interaction with their academic programs or institutions effective (Pascarella & Terenzini, 1991). For example, Stipek and Weisz (1981) and Perry et al. (2001) provide empirical evidence of the positive effects of control on academic performance and academic motivation. Specifically, Perry et al. (2001) find that high-academic-control students showed more effort and motivation and were less bored and anxious about their academic experiences in comparison to their low-control counterparts, thus indicating positive effects of the feeling on student outcomes in college.

Generally, ownership feelings toward an object are associated with the perceived control one exerts over that object. The greater the degree of that control over the object, the more likely that object is to become a part of the self. Therefore, feelings of control over an entity give rise to feelings of ownership over that entity and result in PO (Perry et al., 2001). This particularly refers to social control where individuals believe to exert power or control over their relationship with others. Thus, students' feelings of control over their educational experiences and outcomes may positively influence PO. The greater the student's feelings of control over the program, the deeper the feeling of PO toward that program.

H2: *Perceived control is positively related to PO.*

Individual-institution identification stands for the relationship between the self and the ownership target (i.e., the academic program) as well as the desire to maintain continuity of self-identity and expression of self-identity to others (Tajfel & Turner, 1979). Organizational identification (OI) concept has many roots in social identity theory, which ties the perception of oneness with some social or human entity. Tajfel (1982) suggests that to achieve the state of "identification," two components are necessary: a cognitive one (awareness of membership) and an evaluative one (sense that this awareness is related to some value connotations). Ellemers, Kortekaas, and Ouwerkerk (1999) add an *emotional or affective* component (a sense of emotional involvement with the group) to the concept of identification.

The concept of identification took a new meaning in organizational behavior research. Pratt (1998) suggests that organizational identification occurs when individuals integrate their beliefs about the organization into their identity. It is argued here that these beliefs of overlapping values with the target of PO constitute another motivation for feelings of PO (Pierce, et al., 2003). Asatryan and Oh (2008) found empirical support for a positive relationship between restaurant patron's sense of identification and PO toward the institution. Studies involving students provide additional evidence of this relationship. Balmer and Liao (2007) indicate a strong emotional attachment to the school's brand among undergraduate students with high levels of identification with that school. Zea, Reisen, Beil, and Caplan, (1997) show a significant positive effect of institutional identification on commitment to remain in university. In a view of the existing evidence, it can be concluded that identification can have positive influence on PO.

H3: *Student – institution identification is positively related to PO.*

Sense of belonging refers to the feeling at home and the sense of affinity that is often expressed through the target of ownership (Duncan, 1981). Dreyfus (1991) suggests that people

may “feel at home” even toward immaterial objects (e.g., language, skills, etc.). Hausmann, Schofield, and Woods (2007) define it as “the psychological sense that one is a valued member of the college community” (p. 804). Academic programs often appeal to such feelings of belonging in their mission statements and recruitment materials.

Sense of belonging was identified as an important variable in students’ institutional experiences (Hurtado & Carter, 1997). Research on the effects of sense of belonging is limited (Velasquez, 1999). Nevertheless, Hausmann et al. (2007) report a positive relationship between sense of belonging and institutional commitment among students. They also found evidence of positive effects of institutional intervention (i.e., sending students small gifts with university logo) on sense of belonging. Students may experience a sense of possessiveness toward the program when they develop such feelings of belonging, thereby developing sense of ownership toward the program that enhances those feelings. Consequently, sense of belonging can be positively associated with PO.

H4: *Sense of belonging is positively related to PO.*

Outcomes of PO

Satisfaction experienced by students is often considered as one of the most important intermediary outcomes of higher education (Astin, 1993). A number of studies look at satisfaction as an attitude and conceptualize it as an attitude-like variable referring to a particular object that captures a large portion of the individual’s total reaction to the object or experience in question (Oliver, 1997). This study follows a prevailing approach and defines satisfaction as an attitudinal construct that captures a large portion of the students’ reaction to studying in a program in question. Asatryan & Oh (2008) suggest that in the context of restaurant business PO was positively related to such constructs as relationship intent, word-of-mouth, and willingness to pay more, which are often considered as outcomes of satisfaction. Similar pattern may occur in the educational environment as well and PO may have impact on the antecedent of the constructs identified by Asatryan and Oh (2008). Therefore, we it can be proposed that high levels of students’ PO will be positively related to their satisfaction with their educational program/institution.

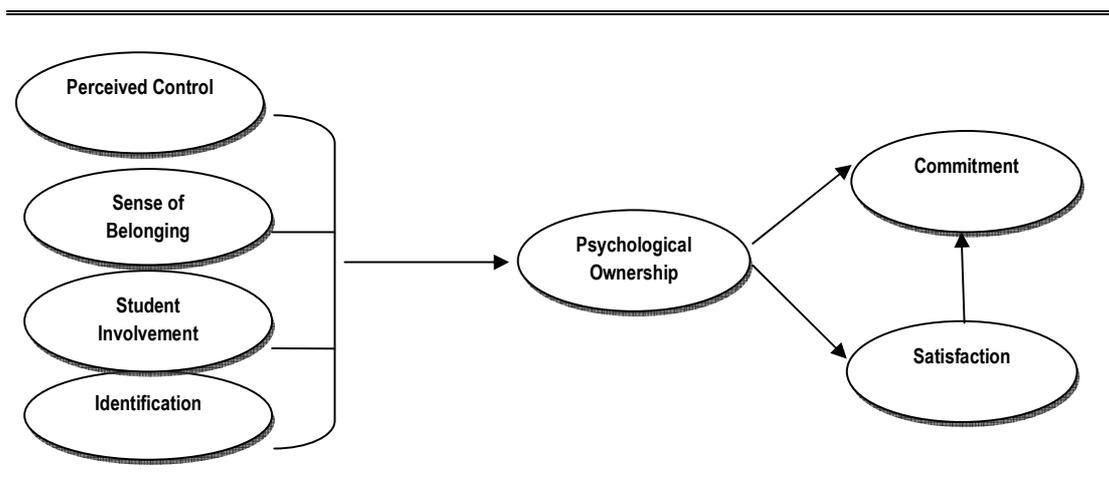
Commitment, as defined by Moorman, Zaltman, and Deshpande (1992) refers to “an enduring desire to maintain a valued relationship” (p. 316). Zea et al. (1997) indicate that value congruence and collective self-esteem as a member of the institution’s community (concepts similar to PO) influence student commitment to remain in college. Feelings of ownership may positively influence an individual’s commitment toward the institution because they satisfy the need for belonging and attachment. Hence, it can be assumed that PO will be positively related to commitment. Moreover, multiple studies in consumer behavior report that satisfaction has a positive impact on commitment (Oliver, 1997). Thus, the following hypotheses can be formulated:

H5: *PO will positively affect satisfaction and commitment.*

H6: *Satisfaction will mediate the effect of PO on commitment.*

Figure 1 depicts the proposed relationships among the constructs.

Figure 1. The proposed model of students’ Psychological Ownership



METHODS

Sample, Instrument, and Data Collection

A convenience sample of hospitality and business undergraduate students from 4 programs in the United States and Canada was used to collect data in an on-line format. An online questionnaire was developed based on the constructs specified in Figure 1.

All measurement items and scales were adopted from previous publications on the subject of PO and its outcomes (Asatryan & Oh, 2008; Soderlund, 2006; Strauss & Volkwein, 2004). The instrument underwent a review by 4 faculty members from one of the participating universities to ensure content validity. All measurement items, except for customer identification, satisfaction, and demographics, were measured on a 5-point Likert scale ranging from “strongly disagree” to “strongly agree.” Customer identification was measured on a 5-point scale ranging from “never” to “often”. Satisfaction 5-point Likert scale ranged from “not satisfied” to “very satisfied”.

Data analysis

The analysis consisted largely of two parts: (1) preliminary/descriptive analyses and (2) structural equation modeling. Missing data, normality, reliability, and sampling adequacy were checked during the preliminary analysis. The proposed measurement model was examined by conducting confirmatory factor analysis. The model consisted of seven latent constructs with 41 indicators. In the model four of the latent constructs were exogenous variables, which were sense of belonging, perceived control, student involvement, and student-institution identification, and three of the variables were endogenous variables, namely, PO, satisfaction, and student commitment. The structural model fit was assessed through a number of fit indices recommended by Klein (2005), such as chi-square (χ^2), goodness of fit index (GFI), and root mean square error of approximation (RMSEA).

RESULTS AND DISCUSSION

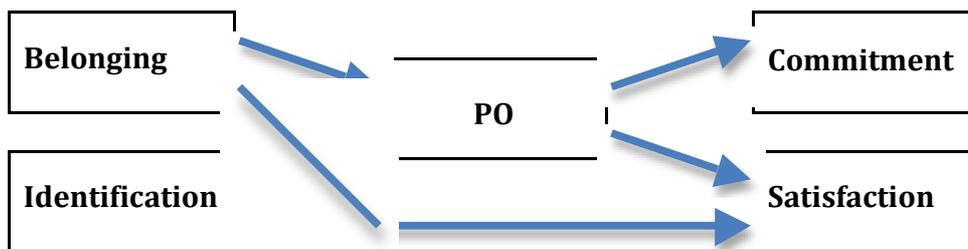
Preliminary analysis was conducted to determine sampling adequacy for conducting factor analysis and other tests. The value of the Kaiser-Mayer-Olkin test ranged from .71 to .82

and exceeded a recommended acceptable level of .7 for all constructs (George & Mallery, 2001). These results indicated an acceptable level of sampling adequacy for conducting factor analysis with the data. Bartlett's Test of Sphericity indicated significant chi-squares for all constructs ($p < .01$). This meant that the correlation matrix was not an identity matrix and was suitable for conducting factor analysis. Cronbach's alpha was computed to evaluate scale reliabilities of the variables in the measurement model. Cronbach's alpha was above .7 for all constructs, thus, high internal consistency for all constructs (Churchill, 1979).

Confirmatory factor analysis (CFA) was performed with MPlus 4.0 to check construct validity of the measures. Initial CFA resulted in a slightly poor fit: $\chi^2(573) = 1228.53$, ($p = .00$), RMSEA = .07 CFI = .85. Following recommendations by Byrne (1998), three items were removed from the measurement model based on significantly large modification indices associated with that item. The modified CFA resulted in a better fit: $\chi^2(506) = 1069.26$, ($p = .00$), RMSEA = .071, CFI = .87 (Klein, 2005).

Testing the structural model (based on the modified CFA) resulted in modification of the original model into a partially mediated model (see Figure 2).

Figure 2. Partially mediated model.



The partially mediated model of causal relationships between the antecedents of PO and its consequences provided the best fit for the data: $\chi^2(241) = 588.21$ ($p = .00$), RMSEA = .08, CFI = .90. All hypothesis tests were conducted based on model in Figure 2, where PO mediates the relationships between belonging and satisfaction. Hypotheses 1, 2 and 6 were not supported, as influence of such constructs as control and involvement on PO was not statistically significant. Hypotheses 3, 4, and 5 were supported.

Discussion

Developing long-term relationships with their students becomes imperative for educational institutions. This study attempted to examine the factors that affect the development of relationships based on student satisfaction and commitment. The study tested a conceptual model of PO to better explain the role that feelings of “mineness” play in student-educational institution relationships. The model tested the role of PO in the process of developing student satisfaction and commitment.

The results indicated a potential for the PO theory's application in and contribution to educational research. Results of the study supported most of the hypothesized structure of antecedents for PO. Sense of belonging and student-institution identification appeared to contribute most to the formation of PO in accordance with the theory. The results supported earlier suggestions that PO can be applied in educational settings (Pierce et al., 2003).

An additional noteworthy finding of the study was the lack of significant path from perceived control and student involvement to PO. This finding is also inconsistent with earlier results obtained by Pierce et al. (2003). Therefore, the insignificant relationship between these constructs requires further investigation. It is possible that the insignificant relationship between the variables is due to missing some key variable (Farris, Parry, & Ailawadi, 1992). This might happen due to underdevelopment of PO theory and little empirical research done on the subject. Another plausible explanation has to do with respondent's perceived lack of control over their educational experiences due to limited number of options available.

The relationships between PO and such consequences as student satisfaction and commitment appeared to be positive and significant. This indicates a positive influence of feelings of "mineness" toward an educational institution. The results show that educational institutions may benefit by cultivating the sense of belonging and students' identification with the institution may reap such rewards as students' satisfaction with their educational experiences and commitment to their institutions, which in turn can lead to such positive outcomes as long-term alumni relationships. These results are consistent with previous findings in organizational behavior literature, which suggested a positive relationship between PO and organizational commitment (Vandewalle et al., 1995) .

References

- Asatryan, V., & Oh, H. (2008). Psychological ownership theory: An exploratory application in the restaurant industry. *Journal of Hospitality & Tourism Research*, 32(3), 363-386.
- Astin, A. W. (1984). Student involvement: A developmental theory for higher education. *Journal of College Student Personnel*, 25, 297-308.
- Astin, A. W. (1993). *What Matters in College? Four Critical Years Revisited* (1st Ed.). San Francisco: Jossey-Bass
- Balmer, J. M. T., & Liao, M-N. (2007). Student corporate brand identification: An exploratory case study. *Corporate communications: An international Journal*, 12(4), 356-375.
- Bean, J. P. (1983). The application of a model of turnover in work organizations. *The Review of Higher Education*. 6, 129-148.
- Bean, J. P. (1990). Why students leave: Insights from research. In D. Hossler, and J. P. Bean (Eds.), *The Strategic Management of College Enrollments*. San Francisco: Jossey-Bass..
- Braxton, J. M. & Brier, E. M. Melding organizational and interactional theories of student attrition: A path analytic study. *Review of Higher Education*, 13(1), 47-61.
- Byrne, B. M. (1998). *Structural equation modeling with LISREL, PRELIS, and SIMPLIS: Basic concepts, applications, and programming*. New Jersey: Lawrence Earlbaum.
- Chickering, A. (1969). *Education and identity*. San Francisco: Jossey-Bass.

Churchill, G. A. (1979). A paradigm for developing better measures of marketing constructs. *Journal of Marketing Research*, 16, 64-73.

Duncan, N. G. (1981). Home ownership and social theory. In J.S. Duncan (Ed.), *Housing and identity: Cross-cultural perspectives* (pp. 98-134). London: Croom Helm.

Ellemers, N., Kortekaas, P., & Ouwerkerk, J. W. (1999). Self-categorization, commitment to the group and group self-esteem as related but distinct aspects of social identity. *European Journal of Social Psychology*, 29, 371-389.

Farris, P. W., Parry, M. E., & Ailawadi, K. L. (1992). Structural Analysis of Models with Composite Dependent Variables. *Marketing Science*, 1(1), 76-95.

George, D., & Mallery, P. (2001). *SPSS for windows step by step: A simple guide and reference 10.0 update* (3rd ed.). Needham, MA: Pearson Education Company.

Gursoy, D., & Swan, N. (2004). An industry-driven model of hospitality curriculum for programs housed in accredited colleges of business. *Journal of Hospitality & Tourism Education*, 16(4), 13-20.

Hausmann, L. R., Schofield, J. W., & Woods, R. L. (2007). Sense of belonging as a predictor of intentions to persist among African American and white first-year college students. *Research in Higher Education*, 48(7), 803-839.

Heckman, R., & Guskey, A. (1998). The relationship between alumni and university: Toward a theory of discretionary collaborative behavior. *Journal of Marketing Theory and Practice*, 6(2), 97-112.

Hurtado, S., & Carter, D. (1997). Effects of college transition and perceptoins of the campus racial climate on Latino college students' sense of belonging. *Sociology of Education*, 70, 324-325.

Jackson, J. F. L., & Kile, K. S. (2004). Does a nexus exist between the work of administrators and student outcomes in higher education?: An answer from a systematic review of research. *Innovative Higher Education*, 28(4), 285-301.

Kline, R. B. (2005). *Principles and practice of structural equation modeling*. New York: Guilford Press.

Kuh, G. D. (2001). Assessing what really matters to student learning: Inside the National Survey of Student Engagement. *Change* 33(3), 10-17.

Mallinckrodt, B., and Sedlacek, W. E. (1987). Student retention and use of campus facilities by race. *National Association of Student Personnel Administrators*, 24(3), 28-32.

Moorman, C., Zaltman, G., & Deshpande, R. (1992). Relationships between providers and users of marketing research: The Dynamics of Trust within and between Organizations, *Journal of Marketing Research*, 29(3), 314-328.

Pare, G., Sicotte, C., & Jacques, H. (2006). The effects of psychological ownership on physicians' acceptance of clinical information systems. *Journal of the American Medical Informatics Association*, 13(2), 197-205.

Pascarella, E. T., & Terenzini, P.T. (1991). *How college affects students: Findings and insights from twenty years of research*. Jossey-Bass Publishers.

Perry, R. P., Hladkyj, S., Pekrun, R. H., & Pelletier, S. T. (2001). Academic control and action control in the achievement of college students: A longitudinal field study. *Journal of Educational Psychology*, 93, 776-789.

Pierce, J. L., Kostova, T., & Dirks, K. (2003). The state of psychological ownership: Integrating and extending a century of research. *Review of General Psychology*, 7(1), 84-107.

Pratt, M. G. (1998). To be or not to be: Central questions in organizational identification. In D. A. Whetten, & P. C. Godfrey. (Eds.), *Identity in organizations: building theory through conversations* (pp. 171-207). Thousand Oaks, CA: Sage Publications.

Soderlund, M. (2006). Measuring customer loyalty with multi-item scales: A case of caution. *International Journal of Service Industry Management*, 17(1), 76-98.

Stipek, D. J., & Weisz, J. R. (1981). Perceived control and academic achievement. *Review of Educational Research*, 51, 101-138.

Strauss, L. C., & Volkwein, J. F. (2004). Predictors of student commitment at two-year and four-year institutions. *The Journal of Higher Education*, 75(2), 203-227.

Tajfel, H. (1982). Social psychology of inter-group relations. *Annual Review of Psychology*, 33, 1-39.

Tajfel, H., & Turner, J. C. (1979). An integrative theory of intergroup conflict. In W. G. Austin & S. Worchel (Eds.), *The social psychology of intergroup relations* (pp. 33-48). Monterey, CA: Brooks/Cole.

Tinto, V. (1975). Dropout from higher education: A theoretical synthesis of recent research. *Review of Educational Research*, 45, 89-125.

Tinto, V. (1987). *Leaving college: Rethinking the causes and cures of student attrition*. Chicago, IL: The University of Chicago Press. ..

Titus, M. A. (2004). An examination of the influence of institutional context on student persistence at 4-year colleges and universities: A multilevel approach. *Research in Higher Education, 45*(7), 673-699.

Wood, C. M. (2003). The effects of creating psychological ownership among students in group projects. *Journal of Marketing Education, 25*(3), 241-249.

Van Raaij, W. F., & Pruyn, A. T. H. (1998). Customer control and evaluation of service validity and reliability. *Psychology & Marketing, 15*(8), 811-832.

Velasquez, P. (1999). *The relationship between cultural development, sense of belonging, and persistence among Chicanos in higher education: An exploratory study*. Paper presentation at the Association for the Study of Higher Education, San Antonio, Texas, Nov. 19.

Vandewalle, D., Van Dyne, L., V., & Kostova, T. (1995). Psychological ownership: An empirical examination of its consequences. *Group & Organization Management, 20*(2), 210-226.

Zea, M. C., Reisen, C. A., Beil, C., & Caplan, R. D. (1997). Predicting intention to remain in college among ethnic minority and nonminority students. *Journal of Social Psychology, 137*, 149-160.

THE INFLUENCE OF SELF-EFFICACY AND LOCUS OF CONTROL ON CONFLICT HANDLING STYLES

Ayşın Paşamehmetoğlu
Hotel Management Department
Özyeğin University, Turkey

Şirin Atakan-Duman
Department of Business Administration
Turgut Özal University, Turkey

ABSTRACT

This study aims to understand the effect of two personal traits on conflict management styles of tourism department students and to examine the possible differences between tourism department students and other social science departments' students of Turkish well known and top three universities. By linking the personal traits (self-efficacy and locus of control) and the behaviors (conflict handling modes) of individuals this study, aims to identify the possible contributions to the skill development and professional success of tourism students. Results indicate that tourism students significantly differ with other social science departments' students on collaborating conflict management styles. Tourism students had higher values on collaborating, avoiding and compromising conflict management styles if they were compared to other social science departments' students. In addition results of the study revealed that tourism students had higher self efficacy.

KEYWORDS: Conflict management styles, Locus of control, Self-efficacy, Tourism department students.

INTRODUCTION

Many studies agree that conflict is a process and exists when one party perceives that they have negatively affected by another party (Robbins, 1998; Wall and Callister, 1995). Kilmann and Thomas (1977) put forward five conflict handling intentions by combining the assertiveness and cooperativeness dimensions. The researchers defined assertiveness as the extent to which the individual attempts to satisfy his/her own concerns and cooperativeness as the extent to which the individual attempts to satisfy the others' concerns (Robbins, 1998). Competing style is generally identified as an assertive and uncooperative style, while accommodating is considered as an unassertive and cooperative style and avoiding as unassertive and uncooperative style, in accordance collaborating style is agreed to be both assertive and cooperative and finally compromising as an intermediate alternative of conflict handling style (Robbins, 1998; Wall and Callister, 1995).

Some studies in literature showed that self-efficacy and locus of control traits have influence on the conflict handling styles of different respondents. Taylor (2010) was one of these researchers stated that locus of control has an effect on the conflict handling strategies of individuals. The researcher showed that the conflict handling strategies -that was classified by Putnam and Wilson (1982) as solution, control and non-confronting- differ between two opposing dispositions of locus of control (Taylor,

2010). The research showed that people who believe to have personal control over their fate (internals) are more likely to use solution oriented conflict handling styles while, individuals who believe that the life events are beyond their control (externals) are more likely to prefer non-confrontational strategies of conflict resolution (Taylor, 2010). Similarly, past research revealed relation between self-efficacy and efficiency in dealing with problems (Wood and Bandura, 1990; Bandura, 1997) and in conflict situations (Desilvia and Eizen, 2005). In line with the previous literature this study aims to contribute by revealing the moderating role of self-efficacy on the relationship between locus of control and conflict management styles.

CONCEPTUAL FRAMEWORK

In literature there are a lot of different definitions of conflict, but these definitions agree on that conflict is a process and exists when one party perceives that they have negatively affected by another party (Robbins, 1998; Wall and Callister, 1995). There are five basic conflict handling intentions which Thomas and Kilmann represented by combining two dimensions; assertiveness (the extent to which the individual attempts to satisfy his or her own concerns) and cooperativeness (the extent to which the individual attempts to satisfy the other person's concerns) (Robbins, 1998). According to these two dimensions, competing is an assertive and uncooperative style, accommodating is an unassertive and cooperative style, avoiding is unassertive and uncooperative, collaborating is both assertive and cooperative and finally compromising is an intermediate alternative of conflict handling style (Robbins, 1998; Wall and Callister, 1995). In our study, we grouped conflict handling styles as assertive styles (competing and collaborating), the middle ground (compromising) and unassertive styles (avoiding and accommodating) and conducted the analysis accordingly as shown in Model of the study (Figure 1).

As conflict is inevitable in every kind of organization, it is more reasonable to manage it rather than trying to prevent it (Pascale, 1994). According to Pascale (1994), conflict has to be manipulated by managers in order to be effective. When conflict managed carefully it can lead to creative stress and high levels of organizational learning (Pascale, 1994). Many researchers put forward that one of the most important role of the manager is to predict the possible conflicts that may arise between employees or departments and prepare the relevant solutions (Barker et al., 1988; Bartlett and Ghoshal, 1995; Schonberger, 1996).

On the other hand, some researchers revealed that conflict has positive effects on organization's dynamics (Alexander, 1991; Mintzberg, 1991). Alexander (1991), indicate that during high uncertainty, conflict is very useful in order to provide an information flow. Although Mintzberg (1991), revealed that the conflict in organizations increase the performance up to an optimum level and after that optimum point it reduces the performance and has destructive effects on the organizational dynamics.

Some researchers consider conflict is necessary for change and development (Pichault, 1995). However, Pascale (1994) considers conflict as a chance to understand the hidden issues and redefining of the goals and suggests that conflict enhance the effectiveness of the organization to some extent. Sometimes it is known that managers act provocative to encourage conflict in their organizations to increase

the overall performance (Pascale, 1994). However it is very important to control the conflict to take place in a desired level and managers are responsible for defining this optimum level (Mintzberg, 1991).

In literature there are two different approaches of conflict management. These approaches are, competitive approach (based on struggle) and cooperative approach (based on communication). In competitive approach one party wins and reaches a desired solution while the other party loses (Barker et.al., 1988). This approach results with a winner and a loser (Clopton, 1984). In this approach both party use strategies of giving promises, persuasion, forcing and threatening. On the other hand, when the parties have equal powers and the result has importance for both parties, they prefer cooperative style of conflict management. Pascale (1994), revealed that organizations which reached an internal balance prefers cooperative approach. This approach has positive outcomes as it prevents parties from dead ended negotiations. For this reason, most researchers suggest more satisfactory and permanent cooperative approach rather than competitive approach (Barker et.al., 1988; Clopton, 1984). Dumaine (1994), insist that the parties of the conflict has to be willing to cooperate and should put effort for some solution. Although Barker, Tjosvold and Andrews (1988) indicate that the parties should first define their priorities when using cooperative approach. In other words parties should trust each other.

Conflict management influences employees' psychologically and have effects on group performance and organizational effectiveness (DeDreu et.al., 2001). Researchers put forward that most of the dysfunctional conflict results from interpersonal conflicts on political norms, values and personal taste (DeDreu, and Vianen, 2001). DeDreu and Vianen (2001), examined how teams should respond to conflicts based on interpersonal issues and they concluded that collaborating and contending responses to relationship conflicts lacks the task performance of teams. So it is suggested preferring avoiding responses, which is more functional for the team's effectiveness (DeDreu and Vianen, 2001). Similarly, Coyle (1994) indicate that individuals who deal with interpersonal conflicts by either avoiding it or forcing their wishes. A constructive confrontation of the conflict may be a better solution for the solution of interpersonal conflicts (Coyle, 1994). On the other hand, when the conflicts result from the task and the decision making of the team considered, some research findings suggest that groups that develop integrative conflict management styles are more effective during decision making process (Kuhn and Poole, 2000).

Steve, Tjosvold, and Law (2002), suggest that teams that manage conflicts can affect their sense of efficacy and overall performance. When the member of the teams feel them self-confident about solving a conflict, they become more productive (Steve et.al., 2002). There may be different causes of intra-organizational conflict: differences in knowledge, beliefs, basic values, competition for power or recognition, personal dislike, different perceptions (Weider-Hatfield and Hatfield, 1995). It is important to examine and identify what is the main cause of conflict before trying to solve it. Conflict that is not solved may lead negative consequences such as: lower levels of motivation and goal attainment, low performance, absenteeism, turnover (Olson-Buchanan et.al., 1998). So it is necessary to either solving the conflict or to prevent it. Conflicts can be prevented by developing multiple alternatives for the problem, concentrating on facts rather than data and establishing concurring goals (Eisenhardt et.al., 1997).

Eisenhardt, Kahwajy and Bourgeois (1997), found that companies use same tactics for managing conflict. These tactics include; working with more information, developing multiple alternatives, commonly shared goals, inject humor to decision making, maintain balanced power structure and resolve issues without forcing consensus. Clarke and Lipp (1998), suggest a seven step conflict resolution process. The steps of this resolution process are; identification of the problem, clarification of the problem, cultural exploration, organizational exploration, conflict resolution, impact assessment and organizational integration.

The Relation between Locus of Control and Conflict Management

Rotter (1966) defined locus of control as the individuals' perceived control over his/her environment. It refers to the degree of personal control over one's own fate (Taylor, 2010). Individuals who have internal locus of control believe that they have great control over their fate. They tend to be more achievement oriented and they have more persuasive ability in interactions (Arnston et.al., 1980; Taylor, 2010). In contrast, external locus of control refers to outside control. Externals tend to believe that the environmental and situational factors are more determining over their fate.

Rubin (1993) showed that individuals who has internal locus of control are more willing to communicate while externals show anxiety toward communication. There are other researches supports the positive relationship between internal locus of control and persuasive communication (Rubin and Rubin, 1992). In addition, Arnston and co-authors (1980) revealed that the persuasive ability increases as the internal locus of control increases. On the other hand, the externals perceive the outside conditions are responsible from their situation and as there is little to do to change them, they tend to be less competent during communication (Avtgis and Rancer, 1997). Consequently, it can be argued that those who believed that they have a control over their lives (internals) will tend to communicate more assertive as they believe that they can change things. Research on the relationship between locus of control and conflict handling intentions are limited (Taylor, 2010). Taylor (2010) was one of these researchers stated that locus of control has an effect on the conflict handling strategies of individuals. The researcher showed that the conflict handling strategies -that was classified by Putnam and Wilson (1982) as solution, control and non-confronting-differ between internals and externals (Taylor, 2010).

H1a: Internal LOC will be positively related to assertive conflict management styles.

H1c: Internal LOC will be positively related to compromising conflict management style.

H1d: External LOC will be positively related to compromising conflict management style.

H1f: External LOC will be positively related to unassertive conflict management styles.

The Relation between Self-Efficacy and Conflict Management

Past research revealed relation between self-efficacy and efficiency in dealing with problems (Wood and Bandura, 1990; Bandura, 1997) and in conflict situations (Desivilya and Eizen, 2005). Some researchers associated self-efficacy with

confidence for overcoming and dealing with various challenging situations (Skinner et.al., 1988; Schwarzer et.al., 1999; Schwarzer and Jerusalem, 1999). As a result self-efficacy can be said to be directly related to accomplishing a task successfully (Desilvia and Eizen, 2005). For that reason we believe that people who are not confident most probably avoid conflict situations and prefer unassertive conflict handling styles. And additionally people who feel confident about achieving an objective will better deal with the conflict situations and prefer assertive conflict management styles.

H2a: High self-efficacy personality trait will be positively related to assertive conflict management styles.

H2d: Low self-efficacy personality trait will be positively related to unassertive conflict management style.

According to the model of the study both high and low self-efficacy personality trait will be positively related to the compromising conflict handling style as it is believed that according to the situational factors, people who had strong and weak self-efficacy may choose to compromise in a conflict. However, it will be unlikely for someone who has high self-efficacy scores to avoid or accommodate a conflict as it contradicts with their self-efficacy believes as they have the capacity to deal with challenging situations (Desilvia and Eizen, 2005). Conversely, a person with low self-efficacy will prefer to avoid or accommodate a conflict situation as they perceive themselves incapable of coping with challenging situations, confronting a conflict is contradicts with their self-efficacy believes. However, they can exhibit compromising conflict management mode in order to achieve an agreement.

H2b: High self-efficacy personality trait will be positively related to compromising conflict management style.

H2c: Low self-efficacy personality trait will be positively related to compromising conflict management style.

The Moderating Role of Self-Efficacy between Locus of Control and Conflict Management

According to Bandura (1997) self-efficacy is related to how people feel, think or act. A person who has weak sense of self-efficacy tend to feel depressed, pessimistic thoughts, low self-esteem, anxiety and helplessness, on the other hand, someone who has strong sense of self-efficacy is related to health, higher achievement and better social integration (Schwarzer, 1992; Bandura, 1997).

Judge and co-authors (1997) developed the concept of “core self-evaluation” (CSE) to describe the individuals’ self-assessment degree (Hiller and Hambrick, 2005). This concept consists of four overlapping personality traits: self-esteem, self-efficacy, locus of control and emotional stability (Judge et.al., 2002; Judge et.al., 1998; Hiller and Hambrick, 2005). According to the researchers these personality traits share significant similarities and who have high self-esteem, self-efficacy and an internal locus of control are confident about their abilities (Hiller and Hambrick, 2005). In addition, self-efficacy generally associated with competence and success (Gecas, 1989; Maslach et al., 2001). From this point of view it is expected that these overlapping concepts will demonstrate a relationship proposed in H2b and H2e.

H1b: Internal LOC will be positively related to high self-efficacy personality trait.
H1e: External LOC will be positively related to low self-efficacy personality trait.

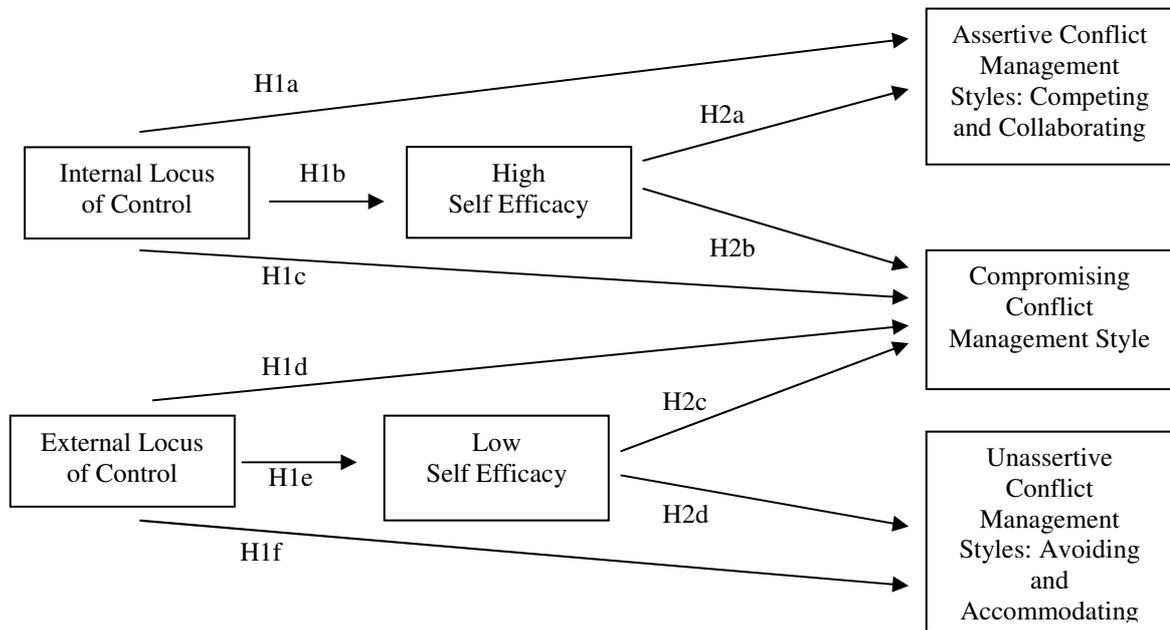


Figure 1. Model of the Study

METHODOLOGY

Measures

When conflict handling styles considered there are mainly two instruments that dominate the studies in literature, these are; Kilmann and Thomas Instrument (MODE) and Rahim Organizational Conflict Inventory (ROCI) (Kilmann and Thomas, 1977; Blum, 1997; Wall and Callister, 1995). Rahim and Blum revised the Rahim Organizational Conflict Inventory (ROCI) and named competing as dominating, accommodating as obliging and collaboration as integrating, while avoiding and compromising remaining the same (Rahim, 1983; Blum, 1997). The conflict handling intentions of the sample was measured by Rahim Organizational Conflict Inventory (ROCI). The conflict management styles scale's Cronbach's was .77.

The locus of control level of the respondents measured with a ten item scale which was adopted from Rotter (1966). Respondents were asked to indicate the extent to which they agreed or disagreed with each item by choosing one of five responses: (5) strongly agree, (4) agree, (3) neither agree nor disagree, (2) disagree, or (1) strongly disagree. In order to evaluate the internal locus of control and external locus of control, the data has been divided into two from the mean value. Higher values represented 'external locus of control' and lower values represented 'internal locus of control'. Before that some of the questions were recoded. The scale's Cronbach's was .80.

The self-efficacy level of the respondents was measured with a ten items scale translated by Yeşilay, Schwarzer and Jerusalem (1996) that was originally adopted

from Jerusalem and Schwarzer (1981). Self-efficacy scale was also divided from the mean value to evaluate the ‘high self-efficacy’ and ‘low self-efficacy’. Items of the scales had a response range from 1 (strongly don’t agree) to 5 (strongly agree). The self-efficacy scale’s Cronbach’s was .40. The demographic questions inquired about age and gender.

Data Collection Process and Analysis

The data presented here is part of a larger study. The main objective of this study is to understand the effect of locus of control and self-efficacy personality traits on conflict management styles of tourism department students. It is also intended to examine the possible differences between tourism department students from the other social science departments’ students of Turkish well known top three universities. In accordance with these objectives of the study data collected from, both tourism department students and students from other social science departments of top three universities in Turkey. The respondents were asked to fill out the questionnaire that consist of data collection instruments of the study from the web page (<http://www.socialresearch.gen.tr>) prepared by the researchers. Participation was voluntary.

The scales used in the study translated by the researchers except the self-efficacy scale which was translated by Yeşilay, Schwarzer and Jerusalem (1996) that was originally adopted from Jerusalem and Schwarzer (1981).

For the data analysis first of all descriptive statistics was reviewed. Afterwards, exploratory factor analysis and correlations was conducted. Finally, in order to test the hypotheses Lisrel 8.51 (Jöreskog and Sörbom, 1993) was used and path analysis was conducted.

RESULTS AND DISCUSSION

A total of 178 participants from Turkey took part in the study. 84 of them were ‘tourism department’ students and 55 of them were ‘management department’ students and 39 were ‘international relations’ department students. 89 of the students were male and 89 of them were female and their average age was 24,36.

Table 1. Inter-Correlations of the Variables

<i>Study Variables</i>	1	2	3	4	5	6	7	8	9	10
1.Collaborating	1									
2.Accommodating	0.069	1								
3.Avoiding	0.061	0.312**	1							
4.Compomising	0.249**	0.271**	0.113*	1						
5.Competing	-0.125**	0.152**	-0.030	0.053	1					
6.Locus of control	-0.176**	0.104	0.132*	0.008	-0.041	1				
7. Self-Efficacy	0.140**	0.063	-0.041	0.060	0.119*	-0.167**	1			
8. Gender	-0.075	0.056	0.038	-0.001	0.202*	0.004	0.036	1		
9. Age	0.105	-0.019	-0.039	0.002	-0.057	-0.037	0.073	0.031	1	
10. Departments	0.271**	-0.050	0.046	0.056	-0.035	-0.105	0.110	0	0.454**	1

N=178, *p< 0.05, **p< 0.01 (2-tailed) for departments 1= management + international relations and 2 = tourism.

Results showed that external locus of control and avoiding conflict management style levels of the respondents are highly correlated ($r=.249, p<.01$). This result indicates that there is a significant positive relationship between the variables of external locus of control and preference of avoiding conflict management style. Results of the correlation analyses support hypothesis H1f. As avoiding conflict management style is an unassertive style, this relation was expected. This result is also congruent with Avtgis and Rancer's (1997) argument that individuals with external locus of control are less competent during communication.

Results also revealed that there is a negative relation between external locus of control and collaborating conflict management style ($r= -.176, p<.01$). This result is relevant in the light of the previous result as collaborating conflict management style is an assertive conflict handling style. Studies in literature showed that individuals with internal locus of control tend to communicate more assertive as they believe that they can change things (Avtgis and Rancer, 1997; Arnston et.al., 1980).

Another significant relation was found between tourism department and collaborating conflict management style ($r=.271, p<.01$). This positive relation between these variables indicates that being a tourism department student and preference of collaborating conflict handling intention are related.

In addition results of the study revealed that there is a positive correlation between high self-efficacy and collaborating conflict management style of the respondents ($r=.140, p<.01$). Results indicates that there is also a correlation between high self-efficacy and competing conflict management style ($r=.119, p<.05$). Results of the correlation analyses support hypothesis H2a. It is understood from these results that there is a positive relation between the two assertive conflict management styles of collaborating and competing styles and high self-efficacy. These results strengthen the arguments of previous studies that revealed a relation between self-efficacy and efficiency in dealing with challenging situations (Wood and Bandura, 1990; Bandura, 1997; Skinner et.al., 1988; Schwarzer et.al., 1999; Schwarzer and Jerusalem, 1999).

High self-efficacy is also found to be negatively correlated with external locus of control ($r= -.167, p<.01$). This means that there is a negative relation between these two variables. It was an expected result as some studies in literature showed that high self-efficacy and internal locus of control personality traits are associated and individuals who has these traits are confident about them-selves (Hiller and Hambrick, 2005)

Differences between Tourism Students and Other Departments

In order to analyze the differences between other social science departments' students and tourism department students Mann-Whitley-U test was used. As the data exhibited skewness problem, in other words as the data is not normally distributed, employing t-test could not be possible. Table 2 shows the median values of the participants.

Table 2. Median Values of the Participants

<i>Variables</i>	<i>Other Departments</i>	<i>Tourism Department</i>
Collaborating	74.22	106.6
Accommodating	92.36	86.3
Avoiding	86.82	92.49
Compromising	86.27	93.11
Competing	91.54	87.21
Locus of Control	95.54	82.74
Self-Efficacy	83.18	96.58

As it can be seen from Table 2, tourism students had higher median values of collaborating, avoiding and compromising conflict management styles if they were compared to other social science departments' students. Besides this tourism students had lower scores on accommodating and competing conflict management styles. This result presents which conflict handling styles are more preferred by tourism department students. Although it seems contradictory that both an assertive style of collaborating and an unassertive style of avoiding and a middle ground solution of compromising are utilized by the tourism department students, this result reveals only the outstanding styles. The preferred style may change dependent upon the conditional factors. Consequently, each style can be employed according to the situation however some of them may outstand in relevance with the backgrounds of the individuals.

Other social science students had higher external locus of control than tourism students and additionally results of the study revealed that tourism students had higher self-efficacy.

Table 3. The Result of Mann-Whitley-U Test

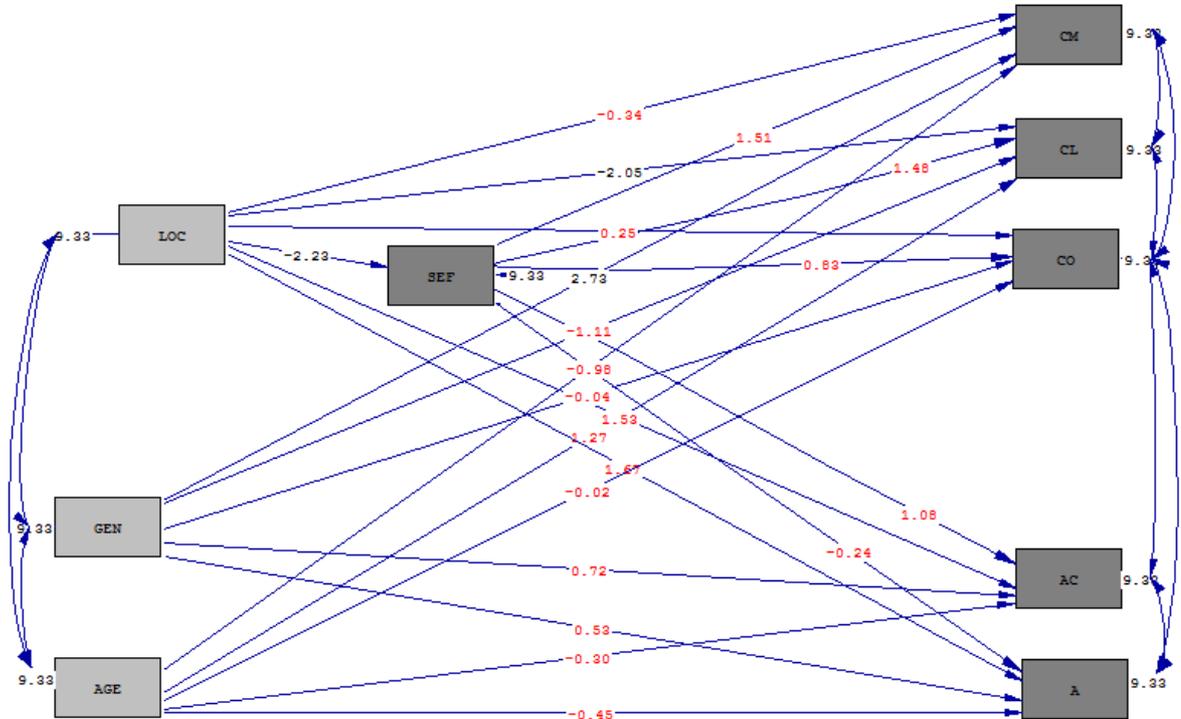
<i>Variables</i>	<i>Other Department Median Value</i>	<i>Tourism Department Median Value</i>	<i>Mann-Whitley U</i>	<i>Wilcoxon W</i>	<i>Z</i>	<i>Asymp. Sig. (2-tailed)</i>
Collaborating	74.22	106.6	2512	6977	-4.209	.000
Accommodating	92.36	86.3	3679.5	7249.5	-.787	.431
Avoiding	86.82	92.49	3696.5	8161.5	-.734	.463
Compromising	86.27	93.11	3644.5	8109.5	-.888	.374
Competing	91.54	87.21	3756	7326	-.561	.575
Locus of Control	95.54	82.74	3380	6950	-1.660	.097
Self-Efficacy	83.18	96.58	3353.5	7818.5	-1.739	.082

When we checked the Mann-Whitley-U test results, we observed that tourism students statistically significantly differ from other students especially with collaborating conflict management score (asympt. Sig. 2-tailed= .000). Tourism students had higher scores on the collaborating conflict management.

Hypothesis Testing

The hypotheses of the study were tested by Lisrel 8.51 (Jöreskog and Sörbom, 1993) and path analysis was conducted. The overall model fit of the study was good and acceptable (RMSEA=0.048; $\chi^2 = 8.43$; $df=6$; $GF1=0.990$; $AGFI=0.921$; and $NFI=0.920$). The study had totally ten hypotheses and after path analyses was conducted two hypotheses was accepted. As it can be seen from Figure 1, there is a negative relation between external locus of control and collaborating conflict management style which means there is a positive relation between internal locus of

control and collaborating conflict management style. As a result H1a is accepted. In addition; there is a negative relation between external locus of control and high self-efficacy which means there is a positive relation between internal locus of control and high self-efficacy. As a result, H1b is accepted. The results of the path analysis that shows the accepted hypotheses presented in Figure 2.



Chi-Square=8.43, df=6, P-value=0.20832, RMSEA=0.048

Figure 2. Path Analysis Results

The variables of Figure 2 can be summarized as; LOC=Locus of Control, SEF=Self-Efficacy, CM=Compromising, CL=Collaborating, CO=Competing, AC=Accommodating, A=Avoiding. There are also two demographic variables in the path analysis. These are; GEN=Gender and AGE=Age.

CONCLUSION

The purpose of our study was to understand the effect of two personal traits (self-efficacy and locus of control) on conflict management styles (competing, collaborating, compromising, avoiding and accommodating) of tourism department students and to examine the possible differences between tourism department students and other social science departments' students of Turkish well known and top three universities. A total of 178 participants from Turkey took part in the study. 84 of them were 'tourism department' students, 55 of them were 'management department' students and 39 were 'international relations' department students. We estimated the structural equation model by LISREL, using path analyses. The overall model fit of the study was good and acceptable (RMSEA=0.048; $\chi^2=8.43$; df=6; GFI=0.990; AGFI=0.921; and NFI=0.920) (Table 4). As a result of the path analyses two hypothesis were accepted.

The results of the study revealed that there is a negative relation between external locus of control and collaborating conflict management style which means that; there is a positive relation between internal locus of control and collaborating conflict management style. As a result H1a is accepted. This finding supports the statement of *externals are less competent during communication* (Avtgis and Rancer, 1997). This result also supports the previous studies argued that individuals with internal locus of control are more willing to impose their thoughts and therefore prefer assertive conflict management styles (Avtgis and Rancer, 1997; Arnston et.al., 1980).

In addition; there is a negative relation between external locus of control and high self-efficacy which means there is a positive relation between internal locus of control and high self-efficacy. As a result, H1b is accepted. Hiller and Hambrick (2005) showed that self-efficacy and locus of control personality traits are associated with each other and those with high self-esteem and internal locus of control are more confident about them-selves. Our study findings support this argument. In addition supports the previous finding of our study as individuals who are more confident about them-selves are more likely to prefer assertive conflict management styles in order to persuade others. Rubin (1993) showed that individuals who has internal locus of control are more willing to communicate while externals show anxiety toward communication. Consistent with the argument of Rubin (1993) our study results showed that tourism department students have higher self-efficacy scores and as H1b is accepted and there is a positive relation between high-self efficacy and internal locus of control, we can conclude that tourism students are more willing to communicate. As a result, we believe that their education contributed their willingness to communicate as communication is a key element for guest satisfaction and for service quality in hospitality sector.

Although in path analysis, hypotheses H2a and H1f were not accepted; results of the correlation analyses support these hypotheses. Correlation results showed that external locus of control and avoiding conflict management style levels of the respondents are highly correlated. This result indicates that there is a significant positive relationship between the variables of external locus of control and preference of avoiding conflict management style (H1f). As externals who tend to believe that situational factors are more determining over their fate and they have little to do to change things; they tend to act less competent during communication (Avtgis and Racer, 1997). It is understood that externals will prefer avoiding conflict management style as they show anxiety toward communication (Rubin, 1993). Externals believed not to prefer assertive styles as they do not believe that they can change things as a result, they will avoid making efforts to persuade others.

In addition, results of the correlation showed that; there is a correlation analysis between high self-efficacy and collaborating conflict management style of the respondents and there is also a correlation between high self-efficacy and competing conflict management style (H2a). There are proposed arguments in literature which are in line with our study results. For example, Desilvia and Eizen (2005) put forward that self-efficacy concept is associated with accomplishing a task. Individuals with higher self-efficacy argued to be more confident in dealing with challenging situations by some researchers (Skinner et.al., 1988; Schwarzer et.al., 1999; Schwarzer and Jerusalem, 1999).

Hospitality sector is more demanding on its employees if it is compared with the other sectors. In order to have high service quality and customer satisfaction, employees should be critical thinking, quick problem solvers and qualified decision makers. Yeung, Wond and Chan (2002) stated that, due to its unique characteristics, the industry puts its employees and guests in morally ambiguous situations and given these affects, managers of this industry should be concerned with the morality of their decisions and actions more. Our research results indicate that tourism students significantly differ from other social science departments' students on collaborating conflict management styles. Correlation analyses results supported Mann-Whitley-U test results and significant relation was found between tourism department and collaborating conflict management style. This positive relation between these variables indicates that tourism department students prefer mostly collaborating conflict management style. Collaborating management style is an assertive and individual attempt to satisfy his/her-own concerns (Robbins, 1998; Wall and Callister, 1995).

In addition to collaborating management style, median values showed that, tourism students had higher values also on avoiding and compromising conflict management styles if they were compared to other social science departments' students. Although it seems contradictory that both an assertive style of collaborating and an unassertive style of avoiding and a middle ground solution of compromising are utilized by the tourism department students, this result proved that tourism students can behave up to the situations. We believe that it's the strength of the tourism students. Consequently, expected results were obtained. As the self-efficacy scores of the tourism students are higher and they are more willing to collaborate in a conflict situation, we believe that the content of the courses of the tourism departments and the curriculums are satisfactory. The courses like human resource management, organizational behavior and sociology are believed to contribute to the education of tourism department students. Moreover, the skill development activities during their education are believed to serve their purposes as expected. In addition we hope our study has opened a window of research opportunities to tourism educators.

ACKNOWLEDGEMENTS

We would like to thank, Assist. Prof. Eda Gürel, Bilkent University, School of Applied Technology and Management, Tourism and Hotel Management Department; Assist. Prof. Elif Akagün-Ergin, Çankaya University, Faculty of Economics and Administrative Sciences, Department of Management; Dr. Bülent Özsaçmacı and Dr. Handan Ozdemir-Akbay, Çankaya University, Faculty of Economics and Administrative Sciences, Department of Management for their considerable help during the data collection process of our study.

REFERENCES

- Alexander, J.A. (1991). Adaptive change in corporate control practices. *Academy of Management Review*, 1, 162-193.
- Arnston, P., Mortensen, C. D., & Lustig, M. W. (1980). Predispositions toward verbal behavior in task oriented action. *Human Communication Research*, 6, 239-252.
- Avtgis, T.A., & Rancer, A.S. (1997). Argumentativeness and Verbal Aggressiveness as a Function of Locus of Control. *Communication Research Reports*, 14, 441-450.

- Bandura, A. (1997). *Self efficacy—the exercise of control*. New York: H. W. Freeman.
- Barker, J., Tjosvold, D., & Andrews, I.R. (1988). Conflict approaches of effective and ineffective project managers: a field study in a matrix organization. *Journal of Management Studies*, 25, 167-178.
- Barlett, C.A., & Ghoshal, S. (1995). Changing the role of top management beyond systems to people. *Harvard Business Review*, 73, 132-142.
- Blum, A.A. (1997). International Human Resource Managers as International Conflict Managers. *Leadership and Organization Development Journal*, 18(4-5), 215-220.
- Clarke, C.C., & Lipp, G.D. (1998). Conflict resolution for contrasting cultures. *Training & Development*, 52, 20-34.
- Clopton, S.W. (1984). Seller and buying firm factors affecting industrial buyers' negotiation behavior and outcomes. *Journal of Marketing Research*, 21, 39-53.
- Coyle, M.B. (1994). Quality interpersonal communication—resolving conflicts successfully. *Manage*, 45, 4-6.
- DeDreu, C.K.W., & Vianen, A.E.M. (2001). Managing relationship conflict and the effectiveness of organizational teams. *Journal of Organizational Behavior*, 22, 309-328.
- DeDreu, C.K.W., Evers, A., Beersma, B., Kluwer, E.S., & Nauta, A. (2001). A theory-based measure of conflict management strategies in the work place. *Journal of Organizational Behavior*, 22, 645-668.
- Desilvia, H.S., & Eizen, D. (2005). Conflict management in work teams: The role of social self-efficacy and group identification. *The International Journal of Conflict Management*, 16(2), 183-208.
- Dumaine, B. (1994). Mr. learning organization. *Fortune*, 8, 147-154.
- Eisenhardt, K.M., Kahwajy, J.L., & Bourgeois, L.J. (1997). How management teams can have a good fight. *Harvard Business Review*, 75, 77-86.
- Gecas, V. (1989). The social psychology of self-efficacy. *Annual Review of Sociology*, 15, 291-316.
- Hiller, N.J., & Hambrick, D.C. (2005). Conceptualizing executive hubris: The role of (Hyper-) core self-evaluations in strategic decision-making. *Strategic Management Journal*, 26, 297-319.
- Jerusalem, M., & Schwarzer, R. (1981). *Fragebogen zur Erfassung von "Selbstwirksamkeit. Skalen zur Befindlichkeit und Persoenlichkeit*. In R. Schwarzer (Hrsg.). (Forschungsbericht No. 5). Berlin: Freie Universitaet, Institut fuer Psychologie.
- Jöreskog, K., & Sörbom, D. (1993). *LISREL 8: Structural equation modeling with the SIMPLIS command language*. Chicago, IL: Scientific Software International, Inc.
- Judge T.A., Erez A., Bono J.E., & Thoresen C.J. (2002). Are measures of self-esteem, neuroticism, locus of control, and generalized self-efficacy indicators of a common core construct? *Journal of Personality and Social Psychology*, 83, 693–710.
- Judge T.A., Locke E.A., & Durham C.C. (1997). The dispositional causes of job satisfaction: a core evaluations approach. In *Research in Organizational Behavior*, Vol.19, Staw B., Cummings L.L. (eds). JAI Press: Greenwich, CT; 151–188.
- Judge T.A., Locke E.A., Durham C.C., & Kluger, A.N. (1998). Dispositional effects on job and life satisfaction: the role of core evaluations. *Journal of Applied Psychology* 83, 17–34.
- Kilmann, R.H., & Thomas, K.W. (1977). Developing a Forced-Choice Measure of Conflict-Handling Behavior: The "MODE" Instrument. *Educational and Psychological Measurement*, 37, 2.

- Kuhn, T., & Poole, S. (2000). Do conflict management styles affect group decision making? Evidence from a longitudinal field study. *Human Communication Research*, 26, 558-590.
- Maslach, C., Schaufeli, W.B., & Leiter, M. P. (2001). Job burnout. *Annual Review of Psychology*, 52, 397-422.
- Mintzberg, H. (1991). The effective organization: forces and forms. *Sloan Management Review*, 32, 54-67.
- Olson-Buchanan, J.B., Drasgow, F., & Moberg, P.J. (1998). Interactive video assessment of conflict resolution skills. *Personnel Psychology*, 51, 1-24.
- Pascale, R.T. (1994). International breakdowns and conflict by design. *Planning Review*, 22, 12-19.
- Pichault, F. (1995). The management of politics in technically related organizational change. *Organizational Studies*, 3, 449-476.
- Putnam, L.L., & Wilson, C. (1982). Communicative strategies in organizational conflict. Reliability and validity of a measurement scale. In M. Burgoon (Ed), *Communication Yearbook* (yearbook 6, pp. 629-652). Newbury Park, CA: Sage.
- Rahim, A. (1983). A measure of styles of handling interpersonal conflict. *Academy of Management Journal* 26, 368-376.
- Robbins, S.P. (1998). *Organizational Behavior: Concepts, Controversies, Application*, International Edition, New Jersey: Prentice Hall Inc.
- Rotter, J. B. (1966). Generalized expectancies for internal versus external control of reinforcement. *Psychological Monographs*, 80, 1-28. PMID:5340840
- Rubin, R.B., & Rubin, A.M. (1992). Antecedents of interpersonal communication motivation. *Communication Quarterly*, 40, 305-317.
- Rubin, A.M. (1993). The effect of locus of control on communication motivation, anxiety, and satisfaction. *Communication Quarterly*, 41, 161-171.
- Schonberger, R.J. (1996). Strategic collaboration: breaching the castle walls, *Business Horizons*, 39, 20-26.
- Schwarzer, R. (1992). *Self-efficacy: Thought control of action*. Washington, DC: Hemisphere.
- Schwarzer, R., Mueller, J., & Greenglass, E. (1999). Assessment of perceived general self-efficacy on the Internet: Data collection in cyberspace. *Anxiety, Stress and Coping*, 12, 145-161.
- Schwarzer, R., & Jerusalem, M. (1999). Skalen zur Erfassung von Lehrer- und Schülermerkmalen. Dokumentation der psychometrischen Verfahren im Rahmen der Wissenschaftlichen Begleitung des Modellversuchs Selbstwirksame Schulen. Berlin, Germany: Freie Universität Berlin.
- Skinner, E., Chapman, M. & Baltes, P.B. (1988). Control, means-ends and agency beliefs: A new conceptualization and its measurement during childhood. *Journal of Personality and Social Psychology*, 54, 117-133.
- Steve, A., Tjosvold, D., & Law, K.S. (2002). Conflict management, efficacy, and performance in organizational teams. *Personnel Psychology*, 53, 625-642.
- Taylor, M. (2010). Does locus of control predict young adult conflict strategies with superiors? An examination of control orientation and the organizational communication conflict instrument. *North American Journal of Psychology*, 12(3), 445-458.
- Wall, J.A., & Callister, R.R. (1995). Conflict and Its Management. *Journal of Management*, 21(3), 515-559.

- Weider-Hatfield, D., & Hatfield, J.D. (1995). Relationship among conflict management styles, level of conflict, and reactions to work. *The Journal of Social Psychology*, 135, 687-698.
- Wood, R., & Bandura, A. (1990). Impact of conceptions of ability on self-regulatory mechanisms and complex decision making. *Journal of Personality and Social Psychology*, 56, 401.
- Yesilay, A., Schwarzer, R., & Jerusalem, M. (1996). Turkish adaptation of the General Perceived Self-Efficacy Scale. Retrieved April 17, 2011, from <http://userpage.fu-berlin.de/health/turk.htm>.
- Yeung, S.Y., Wong, S.C. & Chan, B.M. (2002). Ethical Beliefs of Hospitality and Tourism Students towards their School Life, *International Journal of Contemporary Hospitality Management*, 14(4): 183-192.

Rooms Department Managers Tendency to Create Budgetary Slack

Collin Ramdeen
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

and

Scott A. Lee
College of Professional Studies
Division of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

ABSTRACT

The objective of this study is to investigate the tendency to create budgetary slack (TCBS) within the hotel industry by replicating and extending the Merchant (1985) study on TCBS. The Merchant (1985) study is one of the leading studies on TCBS in the manufacturing sector. The Merchant (1985) study indicated that the design and implementation of the budgeting system affects TCBS. Since the majority of multi-unit hotels use a bottom up approach (participative approach) in their budgeting system, this study examined TCBS based on this type budgeting system. The pretest data collected was analyzed to determine if the results of this study provide support for all four hypotheses presented. The preliminary results indicated support for all four hypotheses. This was consistent with the literature review's expectations.

KEYWORDS: *Budgetary slack, budgeting systems, slack detection, budgetary participation*

INTRODUCTION

A budgeting system is a common accounting tool companies use to implement strategic plans (Horngren, Datar, & Foster, 2006). In other words, a budgeting system aids in planning and controlling the actions companies must undertake to satisfy their customers and succeed in the market. According to Schmidgall (2006), the design and implementation of a budgeting system may be authoritative (top down approach) or

participative (bottom up approach). A participative budgeting process is more conducive to the tendency to create budgetary slack (TCBS).

TCBS describes the practice of underestimating budgeted revenues, or overestimating budgeted costs, to make budgeted targets more easily achievable (Hansen & Mowen, 2005). TCBS often occurs when budget variances (the differences between actual results and budgeted amounts) are used to evaluate performance. Budgetary slack can be used by managers to safeguard against unexpected adverse circumstances. It can also mislead top management about the true profit potential of the firm, which may lead to inefficient resource planning and allocation within the firm (Horngren et al., 2006).

The objective of this study is to investigate TCBS within the hotel industry by replicating and extending the Merchant (1985) study on TCBS. The Merchant (1985) study is one of the leading studies on TCBS in the manufacturing sector. The Merchant (1985) study indicated that the design and implementation of the budgeting system affects TCBS. Since the majority of multi-unit hotels use a bottom up approach (participative approach) in their budgeting system (Schmidgall, 2006), this study will examine TCBS based on this type budgeting system.

This study used the Merchant (1985) survey instrument where appropriate and made modifications when necessary so that the instrument was adaptable to the hotel industry. One of the major criticisms of the Merchant (1985) study was that it did not use random sampling. This study used random sampling because it provides the theoretical support for the research design needed to effectively test the appropriate hypotheses developed (Kerlinger, 1986; Munro, 2005). The next section will explain the literature review associated with TCBS.

LITERATURE REVIEW AND DEVELOPMENT OF HYPOTHESES

Budgeting and Agency Theory

The goal of a budgeting system is to achieve organizational objectives (Horngren et al., 2006). Since employees (agents) do not always give their best efforts in achieving organizational objectives (Merchant, 1981), budgeting systems need to parallel the goals of agents (employees, subordinates) with those of principals (senior management, owners).

Agency theory and its diffusion (principal agent model) provide insights to the budgeting system (Ekanayake, 2004). It is one of the most influential theories that underlie the majority of corporate governance and management control research (Covaleski, Evans & Luft, 2003). Underlying agency theory is the assumption that agents are opportunistic and will always engage in self-serving behavior when opportunities arise (Ekanayake, 2004). As a result, the role of the budgeting system (procedures, information, monitoring, performance evaluation, rewards, and penalties) is to help the principals in controlling the opportunistic behavior of the agents by minimizing opportunities and incentives for this kind of behavior (Demski and Feltham, 1978).

Agency theory researchers (Demski and Feltham, 1978; Baiman, 1982; Covaleski et al., 2003) refer to budgetary slack as “improved employees welfare relative to budgeting practice,” “dysfunctional behavior,” “excess consumption of perquisites” and “tendency to shirk.” Organizational behavior researchers (Schein, 1979) and management accounting researchers (Cammann, 1976; Ekanayake, 2004, Hansen & Mowen, 2005), on the other hand, refer to budgetary slack as “loose budget standards,” “a lack of goal congruence,” “managerial biasing,” “defensive tactical responses,” “deceptive behaviors” and “padding the budget.”

Regardless of the description, TCBS is a managerial trait. It is a major component of the utility function that a manager will try to maximize (Cyert & March, 1963). TCBS is guided by a manager’s own self-interest, and he is motivated to misrepresent his private information in order to successfully obtain results different from his superior (Baiman, 1982).

Tendency to Create Budgetary Slack and Meeting Budgeting Targets

Empirical studies by Miller (1975) and Heneman, Schwab, Fossum and Dryer (1980) inferred that the use of financial rewards motivates the employee to act in their own self-interest. Cherington and Cherington (1973) examined the characteristics of a reward structure as reinforcement in the relationship between budgetary participation and performance. They discovered that a reward structure based on budget achievement represents an appropriate reinforcement for the participants in the budgetary process. Therefore, when budget performance is associated with a company’s reward system, employees are motivated to introduce budgetary slack into their operating budget (Kren, 1992; Dunk, 1993).

Prior researchers (Kenis, 1979; Dunk, 1993) have identified the pressure of not meeting budgetary goals as another significant factor contributing to the development of budgetary slack. The budgeting process puts pressure on individuals to meet their budgetary commitment, which in turn leads to the creation of budgetary slack (Kenis, 1979). Therefore, it is likely that TCBS will increase the pressure on individuals to meet budgetary requirements.

According to Merchant (1985), managers may have TCBS; however, TCBS can be augmented or diminished by the way in which the budgeting system is designed and implemented. Onsi (1973) found a positive relationship between managers’ needs to create budgetary slack and an authoritarian, top-management budgetary control system. Onsi (1973) said that this type of system places heavy stress on achieving budget targets. Cammann (1976) subsequently studied the effects of different styles and uses of control systems that he categorized as “defensive subordinate responses,” and obtained results consistent with Onsi (1973). Murphy (1990) found that when organizations set budget targets on which managerial compensation was based, the organization faced more serious dysfunctional consequences from managerial manipulation. Based on these prior findings, the following hypothesis is presented.

H1: There is a positive relationship between managers' tendency to create budgetary slack and the importance placed on meeting budget targets.

Budgetary Participation

Organizations vary in the degree and form of management participation in their budgeting processes. Agency theorists suggest that the demand for participative budgeting arises because various parties (agents and principals, and central and local management) engaged in the budgeting process have differential information about uncertainty (Baiman, 1982; Baiman & Evans, 1983). The agency theory assumes that there is a significant reason for participative budgeting based on the transfer of information from a subordinate to a superior, and that there are potential gains for both parties (Young, 1985).

The likelihood of injecting budgetary slack tends to increase if managers perceive that they can participate in the formulation of the budget (Hansen & Mowen, 2005). Hansen and Mowen (2005) explained that the participation of managers in the budgetary process plays a vital role in the development of budgetary slack. Onsi (1973) and Merchant (1985) found a negative correlation between the participation of managers in the budgeting process and the opportunities to create budgetary slack. Likewise, Cammann (1976) found that allowing subordinates to participate in the budgetary process reduced a range of behaviors including defensiveness and budgetary slack creation. Hence, the following hypothesis developed.

H2: There is a negative relationship between the managers' tendency to create budgetary slack and the extent of participation allowed in the budgeting process.

Technology Application and Predictability

Prior research on the benefits of technology in service organizations suggests that technology enhances service quality (Reid & Sandler, 1992; Bitner, Brown, & Meuter, 2000), improves efficiency, effectiveness, productivity, and convenience (Nykiel, 2001), strengthens the customer-firm relationship (Reichheld, 1996), elevates the quality-value-loyalty chain (Parasuraman & Grewal, 2000), creates a competitive advantage (Porter, 2001), assists customers, and improves the skills of the employees within the service organization (Blumberg, 1994; Sigauw & Enz, 1999).

The hotel industry has been transformed from a traditional hands-on approach, and low-tech industry into a high-touch and high-tech industry effectively utilizing technology for the benefit of customers, employees, and hotels (Lee, Baker, & Kandampully, 2003). Technology plays an important role in customer-oriented hotels through communication, recognition, and evaluation of customers. According to Lee et al., (2003) technology is applied at two principal levels in hotels: (1) for in-room (guest room) services; and (2) at the managerial and operational level.

Guest-room service technologies include, but not limited to, multiple telephone lines, electronic meal ordering, self-checkout and self wakeup systems, in-room business services, electronic and video entertainment services. These technologies have improved in-room services, widened choices in entertainment, and increased the hotels profitability.

Localities and the type of customers determine the degree to which hotels make these services available to their guests. Hotels whose customers consist of business travelers are more likely to equip their rooms with advanced in-room technologies as opposed to hotels in more remote or in resort locations (Lee et al., 2003).

At the managerial and operational level, technology impacts several functional areas such as marketing (using the internet), accounting (cash receipts and disbursements), and rooms operation (customer service and response time). Technology can increase efficiencies in service delivery that benefit the customers (Blumberg, 1994). Property management systems (PMS) are commonly used in front office, room service and accounting to assist with interconnectivity and decision-making. Also, the global distribution system (GDS), central reservation system (CRS), and the Internet provide customers with more efficient reservation procedures. These systems improve interaction between intermediaries and the hotels to obtain important information regarding their customers (Lee et al., 2003).

These two levels of technology (for in-room (guest room) services and at the managerial and operational level) are used in the hotel industry. They replace Merchant's (1985) two levels of technology (workflow integration and product standardization), which are applicable only to manufacturing operations.

Research on organizational behavior characterizes and measures technology in a single dimension known as "task predictability" (Fry, 1982). Merchant (1985) suggested that it seems logical that technological predictability could be systematically related to the TCBS. Based on prior research (Cyert & March, 1963) suggesting that budgetary slack can be used to absorb uncertainty, Merchant (1985) proposed that slack could provide freedom from short-term commitment that could be used effectively to deal with a lack of predictability. Therefore, Merchant (1985) suggested that there could be a negative relation between technological predictability and the TCBS. Hence the following hypothesis is presented.

H3: There is a negative relation between the degree of predictability of technology in hotels and the tendency of managers to create budgetary slack.

The Ability to Detect Budgetary Slack

The extent to which an organization is decentralized is a possible source that could affect superiors' ability to detect budgetary slack incorporated into the budget by subordinates (Schiff & Lewin, 1970). Schiff and Lewin (1970) reported that in decentralized companies, managers' TCBS was influenced by their perception of top management's ability to detect budgetary slack. Managers in decentralized environments tended to create budgetary slack through practices such as underestimating gross revenues and including discretionary increases in expenditures (Horngren et al., 2006). The amount of budgetary slack created by decentralized managers is likely to be related to the level of decentralization in the organization relative to the superiors' ability to detect budgetary slack (Horngren et al., 2006).

Merchant (1985) stated that the ability (or lack thereof) of superiors to detect slack may also influence their subordinates' tendencies to create budgetary slack. After reviewing cognitive dissonance theory (Brehm & Cohen, 1962), balance theory (Heider, 1958), and congruity theory (Osgood & Tannenbaum, 1955), Merchant (1985) suggested that there is a negative relation between a superior's ability to detect budgetary slack and a subordinate's tendency to create it. From the above information presented the following hypothesis is stated.

H4: There is a negative relationship between superiors' ability to detect budgetary slack and the tendency of managers to create budgetary slack.

To test these hypotheses, an appropriate survey instrument was developed. The survey instrument was a modified version of Merchant's (1985) survey instrument. The next section presents the methodology used to obtain the relevant data for analysis.

METHODOLOGY

Pretest

To ensure that the questionnaire was appropriate, a pre-test using faculty and hotel managers was conducted. This was done to minimize potential problems that could affect the respondents' understanding of the questions presented. Based on the pretest, a number of items were reworded to improve clarification and consistency in the questionnaire mailed out.

Sampling

A random sample of 500 hotels was selected from the American Hotel and Lodging Association (AHLA) listing of hotels. This allowed each of the listed hotels an equal chance of being selected to ensure as far as possible that the sample was representative of the population of hotel organizations (Kerlinger, 1986). This sampling design gives theoretical support to adequately test the hypotheses. For each hotel selected, a questionnaire with a cover letter and prepaid self-addressed envelope was mailed to the Rooms Department Manager. A total of 500 questionnaires were mailed. Two follow-up letters were mailed to improve the response rate (Dillman, 1978). The second follow-up responses received were used to test for a non-response bias. There was no significant difference between early and late respondents.

Measurement and Validity of Constructs

Tendency to Create Budgetary Slack (TCBS)

Managers' tendency to create budgetary slack was measured by using a four-item five-point Likert-scaled instrument, developed by Onsi (1973) and employed by Merchant (1985). This instrument is an established scale that focuses on subordinates' attitude toward slack creation. Responses were scored on a scale from 1 (strongly disagree) to 5 (strongly agree). The instrument relies upon managers' perceptions of the level of slack in their budgets. For example "budgets set for my area of responsibility are safely attained." The Cronbach alpha reported by Merchant (1985) was 0.70. Prior

studies (Nouri & Paker, 1996; Lai, Dunk & Smith, 1996) using the Onsi (1973) instrument reported Cronbach alphas of 0.75 and 0.74 respectively.

Importance of Meeting the Budget

Merchant (1985) used three scaled instruments to measure the importance of meeting the budget, and these instruments were employed in this study. The first instrument “required an explanation of variances” using four five-point Likert-scaled items. The second instrument measured reactions to “expected budget overruns” using a three item five-point Likert-scaled measurement. The third instrument measured the budget’s link with “extrinsic rewards” on a modified five item five-point Likert-scaled instrument. Merchant (1985) reported Cronbach alpha for the three instruments described above of 0.84, 0.72 and 0.79, respectively.

Budgetary Participation

Budgetary participation was measured using Merchant’s (1985) two revised scales derived from his earlier model (1981). “Influence on budget plans” was measured using two five-point Likert-scaled items, while “personal involvement in budgeting process” was measured using three five-point Likert-scaled items. Merchant (1985) reported the Cronbach alpha for influence on the budget plans and personal involvement in budgeting as 0.52 and 0.60, respectively.

Technology

The two measures of technology (work flow interaction and product standardization) used by Merchant (1985) were designed for manufacturing companies. Since these measures were not relevant to hotel operations, they were replaced with two levels of technology that were related to hotel operations. These are technology applied to guest room services and technology used at the managerial and operational level (Lee et al., 2003). These two variables were measured using three items for each variable on a five-point Likert scale anchored by: (1) low level of technology integration; and, (5) high level of technology integration. There was no Cronbach alpha available from previous studies for these two measures.

Slack Detection

The ability to detect budgetary slack was measured using a three item five-point Likert-scale instrument developed by Onsi (1973). This instrument was also used by Merchant (1985). The Cronbach alpha value reported by Merchant (1985) was 0.61.

DISCUSSION

The purpose of this study was to provide some empirical evidence about how the design and implementation of an organization’s budgeting system might affect managers’ tendencies to create budgetary slack. Unlike Merchant’s (1985) study, which was drawn from samples obtained from the manufacturing sector and focused on the functional area of production, this study focused on managers in the functional area of hotel rooms operation in relationship to budgetary slack creation.

Merchant (1985) concluded that the TCBS is a general characteristic of managers. This tendency, according to Merchant (1985), can be affected both positively and negatively depending on the way in which the budgeting systems are designed and implemented. To be specific, Merchant (1985) examined managers TCBS in relationship to the administrative systems of organizations. Merchant (1985) examined four hypotheses and found very little support for them. The first hypothesis, that the propensity of managers to create budgetary slack is positively related to the importance placed on meeting budget targets, was not supported. The second hypothesis, that the propensity of managers to create budgetary slack is negatively related to the extent of participation, received marginal support. The third hypothesis, that the propensity of managers to create budgetary slack is negatively related to the degree of predictability in the production process, obtained very little support. The fourth hypothesis, that the propensity to create slack and the ability of superiors to detect it are negatively associated, received mixed results. Even though the literature review strongly supports the theory underlying Merchant's (1985) hypotheses, he received mixed results. Merchant (1985) suggested that the mixed results of his findings may be attributed to the fact that he used non-random sampling in his research.

The preliminary results of this study provide support for all four hypotheses presented. The results are consistent with the literature review's expectations. Although there is no evidence to suggest that random sampling is the factor that enabled the results of this study to be consistent with those expectations, there is a strong theoretical basis for employing random sampling in hypothesis testing (Kerlinger, 1986).

IMPLICATIONS

While the majority of the empirical literature has interpreted budgetary slack as being dysfunctional to companies' operations, practitioners can use budgetary slack in a meaningful manner to benefit their organization. Budgetary slack can be useful if incorporated into the budgeting system using underlying management accounting assumptions. For example, when a hotel is faced with uncertainty and several short-term objectives, budgetary slack can enable managers to be more focused and motivated because of the availability of additional financial resources. Therefore, budgetary slack can provide managers with a hedge against unexpected adverse circumstances. However, budgetary slack should not convey misleading information to top management because it would destroy the integrity and effectiveness of the budgeting system. Therefore, subordinates using budgetary slack must hold "honest" communication between themselves and their bosses.

Future studies on this topic could focus on understanding how organizations might design budget systems that deliberately integrate budgetary slack. Then individuals could be examined to determine the effectiveness of reputation and ethics in controlling self-interest behavior.

REFERENCES

- Baiman, S. (1982). Agency research in managerial accounting: A survey. *Journal of Accounting Literature*, 1 (2), 154-213.
- Baiman, S., & Evans, J.H. (1983). Pre-Decision Information and Participative Management Control Systems. *Journal of Accounting Research*, 11 (3), 371-395.
- Bitner, M.J., Brown, S.W., & Meuter, M.L. (2000). Technology infusion in service encounters. *Journal of the Academy of Marketing Science*, 28 (1), 138-49.
- Blumberg, D.E. (1994). Strategies for improving field service operations productivity and Quality. *The Service Industries Journal*, 14 (2), 262-77.
- Brehm, J. W., & Cohen, A. R. (1962). *Explorations in Cognitive Dissonance*. New York: Wiley.
- Cammann, C. (1976). Effects of the Use of Control Systems. *Accounting, Organizations and Society*, 1 (4), 301-313.
- Cherington, D., & Cherington, O. (1973). Appropriate Reinforcement Contingencies in the Budgeting Process. *Journal of Accounting Research*, 2, (1) 225-53.
- Childers, T.L., Pride, W.M., & Ferrell, O.C. (1980). A reassessment of the effects of appeals on response to mail surveys. *Journal of Marketing Research*, 17 (3), 365-370.
- Cohen, J. (1988). *Statistical power analysis for the behavioral sciences* (2nd ed.). Hillsdale, NJ: Lawrence Erlbaum Associates.
- Covaleski, M.A., Evans, J. H., & Luft, J.L. (2003). Budgeting research: Three theoretical perspectives and criteria for selective integration. *Journal of Management Accounting Research*, 15 (1), 3-49.
- Cronbach, L. J. (1951). Coefficient Alpha and the Internal Structure of Tests. *Psychometrika*, Vol. 16, (3), 297-334.
- Cyert, R. M., & March, J.G. (1963). *A Behavioral Theory of the Firm*. Englewood Cliffs, NJ: Prentice-Hall.
- Demski, J., & Feltham, G. (1978). Economic Incentives in Budgetary Control Systems. *The Accounting Review*, 53 (2), 336-359.
- Dillman, D.A. (1978). *Mail and telephone surveys: The total design method*. New York: Marcel Dekker, Inc.
- Dunk, A.S. (1993). The effect of budget emphasis and information asymmetry on the relation between budgetary participation and slack. *The Accounting Review*, 68 (2), 400- 410.
- Ekanayake, S. (2004). Agency theory national culture and management control system. *Journal of American Academy of Business*, 4 (1 / 2), 49-54.
- Fry, L. W. (1982). Technology-Structure Research: Three Critical Issues. *Academy of Management Journal*, 7 (4), 532-552.
- Hansen, D.R., & Mowen, M.M. (2005). *Management Accounting*. New York: Thompson South Western Publishing.
- Heneman, H., Schwab, D., Fossum, J.& Dryer, L. (1980). *Personnel-Human Resource Management*. New York: Irwin.
- Heider, F. (1958). *The Psychology of Interpersonal Relations*. New York: Wiley.
- Horngren, C. T., Datar, S. M., & Foster, G. (2006). *Cost accounting: A management emphasis*. Upper Saddle River, NJ: Prentice Hall.

- Kenis, I. (1979). Effects of budgetary goal characteristics on managerial attitudes and performance. *The Accounting Review*, 5 (4), 707-721.
- Kerlinger, F. N. (1986). *Foundations of Behavioral Research*. New York: Holt, Rinehart and Winston.
- Kren, L. (1992). Budgetary Participation and Managerial Performance. *The Accounting Review*, 3 (12), 511-26.
- Lai, M., Dunk, A., & Smith, G. (1996). The propensity of managers to create budgetary slack: A cross-national examination using random sampling. *The International Journal of Accounting*, 31 (4), 483-496.
- Lee, S., Baker, S., & Kandampully, J. (2003). Technology service quality and customer Loyalty in hotels: Australian managerial perspective. *Managing Service Quality*, 13 (5), 423-433.
- Merchant, K. (1981). The design of the corporate budgeting system: Influences on Managerial behavior and performance. *The Accounting Review*, 56 (5), 813-829.
- Merchant, K. A. (1985). Budgeting and the propensity to create budgetary slack. *Accounting Organizations and Society*, 10 (2), 201-210.
- Miller, L. (1975). *Principles of Everyday Behavior Analysis*. New York: Brooks-Cole Publishing.
- Munro, B. H. (2005). *Statistical method for health care research* (5th ed.). New York: Lippincott Williams and Wilkins Publishing.
- Murray, D., (1990). The Performance Effects of Participative Budgeting: An Integration of Intervening and Moderating Variables. *Behavioral Research in Accounting*, 1 (1), 104-123.
- Nouri, H., & Parker, R. J. (1996). The effect of organizational commitment on the relation between budgetary participation and budgetary slack. *Behavioral Research in Accounting*, 1 (1), 74-90.
- Nunnally, L. C. (1978). *Psychometric Theory* (2nd ed.). New York: McGraw-Hill.
- Nykiel, R.A. (2001). Technology, convenience and consumption. *Journal of Hospitality and Leisure Marketing*, 7 (4), 79-84.
- Onsi, M. (1973). Factor analysis of behavioral variables affecting budgetary slack. *The Accounting Review*, 48 (3), 535-548.
- Osgood, C. & Tannenbaum, P. H. (1955). The Principle of Congruity in the Prediction of Attitude Change. *Psychological Review*, 11 (1), 42-55.
- Parasuraman, A. (1997). Reflections on gaining competitive advantage through customer value. *Journal of the Academy of Marketing Science*, 25 (2), 154-61.
- Porter, M. (2001). Strategy and the Internet. *Harvard Business Review*, 79 (3), 63-81.
- Ramdeen, C.D. (2001). *An empirical investigation of the adoption and usage of electronic data interchange in the hotel industry*. Published Dissertation, Ann Arbor, MI: ProQuest Information and Learning Company.
- Reichheld, F. (1996). *The Loyalty Effect: The Hidden Force Behind a Lasting Value*. Boston, MA: Harvard Business School Press.
- Reid, R.D., & Sandler, M. (1992). The use of technology to improve service quality. *Cornell Hotel and Restaurant Administration Quarterly*, 33 (3), 68-73.
- Schein, V. E. (1979). Examining an Illusion: The Role of Deceptive Behaviors in Organizations. *Human Relations*, 2 (2), 287-295.
- Schiff, M., & Lewin A.Y. (1970). The impact of people on budgets. *The Accounting Review*, 70, (2), 259-268.

- Schmidgall, R. S. (2006). *Hospitality industry managerial accounting* (6th ed.). Michigan: Educational Institute of the American Hotel & Motel Association.
- Siguaw, J.A., & Enz, C.A. (1999). Best practices in information technology. *Cornell Hotel and Restaurant Administration Quarterly*, 40 (1), 58-71.
- Young, S. M. (1985). Participative budgeting: The effects of risk aversion and Asymmetric information on budgetary slack. *Journal of Accounting Research*, 23 (5), 829-842.

Evaluating Hospitality Corporations Takeover Using Cash Flow and Earnings Based Measures

Collin Ramdeen
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

and

Scott A. Lee
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

ABSTRACT

This research utilized cash flow and earnings based measures of return to assess the differences in the characteristics of target hospitality companies (gaming, hotels, and restaurants) compared to their industries, and to examine the association of these measures with target company's abnormal returns during the takeover. The preliminary results of this study corroborate the general premise in the literature that target firms are underperformers compared to other firms in their industries. Preliminary results further indicate that this low performance is evident not only in an earnings based measure, but is also evident when a cash flow based measure is used.

KEY WORDS: *Cash flows, earnings based measures, target firms, abnormal returns, and takeovers*

INTRODUCTION

Holmstrom and Kaplan (2001) estimate that the overall acquisition volume in the U.S. reached levels between 10 and 20 percent of GDP in the late 1990s. Corporate takeovers are major events for individual firms and sometimes even for entire industries it is not surprising that wealth effects of mergers attract a good deal of attention in financial research. Jensen and Ruback (1983) and Jarrel, Brickley and Netter (1988) using the stock price reaction during a short window around the announcement date, report important gains from mergers. With wealth gains accrue almost entirely to the

target firm shareholders. Andrade, Mitchell and Stafford (2001) present evidence that the method of payment has an impact on the reaction of stock markets to the merger announcement. Acquiring firms that pay with stock tend to earn significant and negative abnormal returns around the announcement date, while acquirers that finance the transaction with cash earn no statistically significant abnormal returns.

Some of the explanations proposed for takeovers including increase in market power Weber (2004), improvement in target management Andrade, Mitchell and Stafford (2001), production and distribution efficiencies and mitigation of hold-up problems Williamson (1975), and tax advantages Heron and Lie (2002) and Bittlingmayer (2000). The empirical evidence suggests the overall gains from takeovers are small, with the target shareholders capturing most of the incremental value. Using abnormal stock returns around takeover announcements as a proxy for value creation, Andrade et al (2001) report the mean combined cumulative abnormal return (CAR) for acquirers and targets is 1.8 percent over the period 1973-1998. The average CARs for the targets and the acquirers are 16.0 percent and -0.7 percent, respectively.

Low performance of stock acquirers can be related to the signaling hypothesis of Myers and Majluf (1984). In their information asymmetry model, a cash financed takeover is interpreted by the market as good news and a stock-for-stock takeover as bad news. Shleifer and Vishny (2003) develop a model where the financial markets are strong-form inefficient, leading to misvaluation of firms. On the other hand, managers are completely rational and take advantage of their asymmetric information. One of the implications of their model is overvalued acquirers make a stock-for-stock bid for undervalued targets and the method of payment in mergers reveals the prior misvaluation causing a negative market reaction.

Prior studies have examined the characteristics which differentiate merger target firms using either selected financial variables (Hribar and Collins, 2002; Baber and Lyon, 1996; Barton and Simko, 2002; Healy, Palepu, and Ruback, 1992; Simkowitz and Monroe, 1971; Stevens, 1973; Castagna and Matoley, 1976; Belkaoui, 1978; Palepu, 1986), or Tobin's q or other market-based measures (Hasbrouck, 1985; Lang, Stulz, and Walkling, 1989; Servaes, 1991). This research utilizes cash flow and earnings based measures of return to assess the differences in the characteristics of target firms compared to their industries, and to examine the association of these measures with target firms' abnormal returns during the takeover. Practitioners and the business media have raised concerns that the excessive focus on accounting earnings rather than cash flows is likely leads to suboptimal investment decisions McGoldrick (1997) and Barr (2000).

LITERATURE REVIEW

Cash Flow, Earnings, and Takeovers

Accrual accounting earnings has been a matter of interest for managers, current and prospective owners of the firm, and financial analysts. Cash flow, a useful gauge of liquidity, has also been of interest and in recent decades has received greater attention

from academics and accounting regulators. Its supporters view joint earnings and cash flow reporting as an improvement over the issuance of conventional accrual accounting alone, (e.g., Lawson, 1971; Lee, 1972; Ashton, 1976; Ijiri, 1978; Belkaoui, 1988). A number of studies have examined, with mixed results, the usefulness of cash flow versus earnings for the purpose of (1) predicting financial distress, (Beaver, 1966; Casey and Bartzack, 1985; Gentry, Newbold, and Witford 1985; Largay and Stickney, 1980 or, (2) determining the information content of financial statements, (Rayburn, 1986; Wilson, 1986 and 1987; Bowen, Burgstahler, 1987; and Bernard and Stober, 1989).

If takeover bids arise as a result of target firm undervaluation and/or managerial motives Lev (1983), then cash flow and earnings measures may be useful tools for the analysis of takeovers. Coffee (1988) identifies several potential reasons for target firm undervaluation, including the failure of management to efficiently manage the firms' assets, and the risk aversion of managers who may be extremely protective of their own authority. Under this scenario, motivation for a takeover bid stems from the bidder's desire to acquire an undervalued firm, displace current management, and exploit the disparity between the target's potential and current values.

Also, if firms become takeover targets due to undervaluation, then it is possible that the economic characteristics underlying this undervaluation (e.g., inefficient use of assets) are reflected in their accounting-based return measures. As such, the earnings and cash flow to total assets ratios, relative to the industry standard, provide an empirical prediction concerning the sources of value in takeovers and the characteristics of takeover targets. This possibility is addressed empirically by an examination of target firms' earnings to total assets and cash flow to total assets in comparison to the average of these performance measures for firms in the targets' industry. The following hypothesis, stated in the alternative form, is tested:

H1a: $D(E/TA)$ is less than zero.

H1b: $D(CF/TA)$ is less than zero.

Where:

E/TA = Earnings to total assets ratio;

CF/TA = Cash flow to total assets ratio;

$D(E/TA)$ = Difference between target firm earnings to total assets and average earnings to total assets for the target firm's industry;

$D(CF/TA)$ = Difference between target firm and average industry cash flow to total assets;

$D(E/TA)$ and $D(CF/TA)$ = Calculations based on data from the last full fiscal year prior to takeover and resolution.

Takeover results in a gain in wealth for target firms' shareholders. (Dennis and McConnell, 1986; Huang and Walkling, 1987; Bradley, Desai, and Kim, 1988). Rejection of the null for H1 and H2 will provide some indication that target firms are

poor performers compared to their industries. However, this alone will not demonstrate that poor performance is associated with the magnitude of the bid in a takeover offer. The next section describes tests of the association between relative target/industry performance and the abnormal stock returns earned by target firm shareholders.

Cash Flow, Earnings, and Takeover Abnormal Returns

when firms become takeover targets due to managements' failure to efficiently employ assets, and this underperformance can be remedied by a change in management, then, other things being equal, the lower the performance of the target in comparison to similar firms, the greater the gain to the acquirer. Further, if economic performance is proxy by the target's accounting measures of return, the abnormal returns earned by target shareholders during the takeover period should be associated with target firm cash flow and earnings to total assets relative to the industry standard. Under this scenario, $D(CF/TA)$ and $D(E/TA)$ should inversely proxy the extent to which an acquiring firm could better exploit the resources of the target firm and, consequently, should be negatively related to the share price increment that the bidding firm is willing to pay for the target. This leads to the second hypothesis:

H2a: $D(E/TA)$ is negatively related to target firm cumulative abnormal returns observed during

the interval from the first announcement of a takeover offer to the date of takeover resolution.

H2b: $D(CF/TA)$ is negatively related to target firm cumulative abnormal returns observed

during the interval from the first announcement of a takeover offer to the date of takeover resolution.

To analyze the extent to which $D(CF/TA)$ and $D(ETA)$ can explain abnormal returns to targets, the regression in equation (1) below is estimated (Separate regressions of $CAR(1)$ on $D(ETA)$ and on $D(CF/TA)$ are also reported in the result section).

$$CAR(T) = a_0 + a_1 D(CF/TA) + a_2 D(E/TA) \tag{1}$$

Where:

$CAR(T)$ = the cumulative abnormal return of the target over the takeover contest period;

$D(CF/TA)$ = the difference between target firm T's industry; and

$D(ETA)$ = the difference between target firm T's earnings to total assets and average earnings/total assets for T's industry.

Additional factors have been found to influence the magnitude of target firm abnormal returns during the course of a takeover contest. Huang and Walkling (1987) have found that returns to target shareholders are higher when the target's management opposes the takeover, and that more wealth is created in cash transactions than in takeovers conducted all or partly by the exchange of securities. Servaes (1991) also

reports that multiple bidders in the contest increased the returns to target shareholders. Finally Bradley, et. al., (1988) note that, with the appearance of investment banking firms specializing in financing takeovers and the creation of anti-takeover devices, there has been a change in the overall merger environment which occurred about 1981. These factors may confound the results of the analysis shown in equation (2) below.

$$CAR(T) = b_0 + a_1D(CF/TA) + b_2 D(E/TA) + b_3CASH + b_4 HF + b_5 BIDS + b_6 SIZE \quad (2)$$

CAR(T), D(CF/TA), and D(E/TA) are defined above. The control variables have the following definitions: CASH is an indicator variable equaling 1 if the takeover is primarily for cash and 0 otherwise; HF is an indicator variable equal 1 if managements reaction to the takeover indicates that it is hostile and 0 if friendly; BIDS is an indicator variable equal 1 if there is more than one bidder for the target, and 0 if there is only one bidder; and, SIZE is the natural logarithm of market value of equity of the target firm at the beginning of the year in which the takeover announcement is made.

For D(CF/TA) and D(E/TA) the expectation remain the same. Given the discussion above, the coefficients for CASH, HF, and BIDS are expected to be positive. Because SIZE is included as general control variables, there is no directional expectation for their coefficients.

RESEARCH MEHOD

Data collection

A sample of completed takeovers was identified by examining the COMPUSTAT Annual Research File for firms delisted due to merger or acquisition over the period 1994 to 2007.

Firms in Gaming, Hotels, and Restaurants industries were included in the sample. Information on industry earnings, cash flow, and total assets were collected from the COMPUSTAT Research Files. Similar data for target firms was collected from the COMPUSTAT Annual Research File. Return data was collected from the CRSP Daily Return File. Other information collected includes the date of the first takeover offer for the target firm, the form of payment (cash, securities, or mixed cash and securities), the number of bidding firms, and the nature of the takeover, (the takeover was viewed as friendly unless the Wall Street Journal Index reported the opposition of management to the offer). The Wall Street Journal Index and Mergers and Acquisitions were the source of these information items.

The date of the first offer is the date on which the first bid for the firm was made. In a multi-firm bidding contest, this date is not necessarily the date of the first bid by the firm which eventually acquired the target.

Analysis of Data

The final sample consists of 52 takeovers which were completed between 1994 and 2007 Table 1 presents the distribution of the sample by industry and number of takeover. Table 2 subdivides the sample according to various merger characteristics. Due to incomplete coverage in either the Wall Street Journal or Mergers and Acquisitions, one or more merger characteristics could not be determined for a number of firms.

Table 1
Frequency Distribution of Sample by Industry and the Number of Targets Takeover (1994-2007)

Industry	Number of Takeover
Gaming	11
Hotels	22
Restaurants	19
Total	52

Table 2a
Sample Frequency of Takeovers Classified by Method of Payment.

Method of Payment	Number of Firms	Percent
Cash Payment	22	42
Securities	16	31
Mixed cash and securities	14	27
Total	52	100

Table 2b
Sample Frequency of Takeovers According to Management Reaction to Offer

Management Reaction	Number of Firms	Percent
Hostile acquisition	11	21
Friendly acquisition	30	60
Unknown	10	19
Total	52	100

Table 2c
Sample Frequency of Takeovers Classified by Number of Bidders

Number of Bidders	Number of Firms	Percent
1 bidder	32	62
2 bidders	8	15
3 bidders	4	8
Unknown	8	15
Total	52	100

DISCUSSION AND CONCLUSIONS

Of the 52 completed takeovers over for the period 1994 to 2007, takeover targets have mean cash flow and earnings to total assets below their industry means in each of the three fiscal years preceding the year in which the takeover is completed. If these ratios are interpreted as measures of managerial performance, the implication is that target firms were underperformers which may have been taken over for a better use of their asset potential.

Abnormal returns observed for target firm during the takeover period are significantly related to the difference between the target firm and target industry earnings to total assets ratios and to the difference in cash flow to total assets ratios. Abnormal returns are negatively related to the difference in the earnings to total assets ratio, suggesting that target firm assets are indeed underutilized. The difference between target firm and target industry cash flow to total assets is positively related to target firm abnormal returns, suggesting that acquiring firms value the near term cash flow of targets.

REFERENCES

- Andrade, G., Mitchell, M., & Stafford, E. (2001). New evidence and perspectives on mergers. *Journal of Economic Perspectives* 15, 103-120.
- Ashton, R. (1976, Winter). Cash flow accounting: A review and critique. *Journal of Business Finance and Accounting*, 3, 63-81.
- Ayers, B. C., Lefanowicz, C. E., & Robinson, J. R. (2002). Do firms purchase the pooling method? *Review of Accounting Studies* 7, 5-32
- Baker, M., & Savasoglu, S. (2002). Limited arbitrage in mergers and acquisitions. *Journal of Financial Economics* 64, 91-115.
- Barber, B.M., & Lyon, J.D. (1996). Detecting abnormal operating performance: the empirical power and specification of test statistics. *Journal of Financial Economics* 41, 359-399.

- Barton, J. J., & Simko, P. J. (2002). The balance sheet as an earnings management constraint. *The Accounting Review* 77, 1-27.
- Bittlingmayer, G. (2000). *The market for corporate control including takeovers*. In B. Bouchaert & G. deGaest (Eds.), *Encyclopedia of Law and Economics*, University of Ghent, Edward Elgar.
- Beaver, W.F. (1966). Financial ratios and predictors of failure. Empirical research in accounting: Selected studies. *Journal of Accounting Research*, 4, 71-111.
- Belkaoui, A., (1978, Spring). Financial ratios as predictors of Canadian takeovers. *Journal of Business Finance and Accounting*, 2, 93-107.
- Belkaoui, A. (1988). *The new environment in international accounting*. Westport, CT: Greenwood Press.
- Bernard, V.L., & Stober, T.L. (1989, October). The nature and amount of information in cash flows and accruals. *The Accounting Review*, 4, 624-652.
- Bowen, R.M., Burgstahler, D., & Daley, L.A. (1987, October). The incremental information content of accrual versus cash flows. *The Accounting Review*, 4, 723-747.
- Bradley, M., Desai, A., & Kim, E.H. (1988). Synergistic gains from corporate acquisitions and their division between stockholders of target and acquiring firms. *Journal of Financial Economics*, 91, 3-40.
- Casey, C., & Bartzack, N. (1985, Spring). Using operating cash flow data to predict financial distress: Some extensions. *Journal of Accounting Research*, 2, 146-160.
- Castagna, A.D., & Matoley, Z.P. (1976, December). Financial ratios as predictors of company acquisitions. *Journal of the Securities Institute of Australia*, 4, 6-10.
- Coffee, J.C. (1988). Shareholders versus managers: The strain in the Corporate Web. In J.C. Coffee, et. al., *Knights, raiders, & targets: The impact of the hostile takeover*. Oxford University Press.
- Dennis, D.K., & McConnell, J.J. (1986). Corporate mergers and security returns. *Journal of Financial Economics*, 16, 143-187.
- Gentry, J.A., Newbold, P., & Whitford, D.T. (1985, Spring). Classifying bankrupt firms with funds flow components. *Journal of Accounting Research*, 3, 384-401.
- Hasbrouck, J. (1985). The characteristics of takeover targets: Q and other measures. *Journal of Banking and Finance*, 9, 351-362.
- Healy, P.M., Palepu, K.G., & Ruback, R.S. (1992). Does corporate performance improve after mergers? *Journal of Financial Economics*, 31, 135-175.
- Heron, R., & Lie, E. (2002). Operating performance and the method of payment in takeovers. *Journal of Financial and Quantitative Analysis* 37, 137-155.
- Holmstrom, B., & Kaplan, S.N. (2001). Corporate governance and merger activity in the US: Making sense of the 1980s and 1990s. *Journal of Economic Perspectives*, 15, 121-144.
- Hribar, P., & Collins, D.W. (2002). Errors in estimating accruals: Implications for empirical research. *Journal of Accounting Research* 40, 105-134.
- Huang, Y., & Walkling, R.A. (1987). Target abnormal returns associated with acquisition announcements: Payment, acquisition form, and managerial resistance. *Journal of Financial Economics*, 19, 329-345.
- Jarrell, G.A., Brickley, J.A. & Netter, J.M. (1988). The market for corporate control: The empirical evidence since 1980. *Journal of Economic Perspectives*, 2, 49-68.

- Ijiri, Y. (1978, Summer). Cash flow accounting and its structure", *Journal of Accounting, Auditing and Finance*, 4, 331-48.
- Jensen, M.C. (1986). Agency costs of free cash flow, corporate finance and takeovers. *American Economic Review*, 76, 323-329.
- Lang, L., Stulz, R., & Walkling, R.A. (1989). Managerial performance, Tobin's Q and the pains from successful tender offers. *Journal of Financial Economics*, 24, 137-154.
- Largay, J.A., & Stickney, C.P. (1980, July/August). Cash flow, ratio analysis and the W.T. Grant Company bankruptcy. *Financial Analysts Journal* 6, 51-54.
- Lawson, G.H. (1971, October 28, November 4). Cash flow accounting I & II. *Accountant*.
- Lee, T.A. (1972). A case for cash flow reporting. *Journal of Business Finance*, 1, 27-36.
- Lev, B. (1983, Winter). Observations on the merger phenomenon and a review of the evidence. *Midland Corporate Finance Journal*, 2, 6-28.
- Myers, S.C., & Majluf, N. C. (1984). Corporate financing and investment decisions when firms have information that investors do not have. *Journal of Financial Economics* 13, 187-222.
- Palepu, K.G. (1986). Predicting takeover targets. *Journal of Accounting and Economics*, 8, 3-35.
- Patell, J. (1976, Autumn). Corporate forecasts of earnings per share and stock price behavior: Empirical tests. *Journal of Accounting Research*, 2, 246-276.
- Rayburn, J. (1986). The association of operating cash flow and accruals with security returns. *Journal of Accounting Research*, 1, 112-133.
- Servaes, H. (1992, March). Tobin's Q and the gains from takeovers. *The Journal of Finance*, 4 409-419.
- Shleifer, A., & Vishny, R. (2003). Stock market driven acquisitions. *Journal of Financial Economics* 70, 295-311.
- Simkowitz, M., & Monroe, R.J. (1971, November). A discriminant analysis function for conglomerate targets. *Southern Journal of Business*, 4 1-16.
- Stevens, D.L. (1973). Financial characteristics of merged firms: A multivariate analysis. *Journal of Financial and Quantitative Analysis*, 8, 149-165.
- Weber, J. (2004). Shareholder wealth effects of pooling-of-interests accounting: evidence from the SEC's restrictions on share repurchases following pooling transactions. *Journal of Accounting & Economics* 37, 39-57.
- Williamson, O.E. (1975). *Markets and hierarchies, analysis and antitrust implications: A study in the economics of internal organization*. New York: The Free Press.
- Wilson, G.P. (1986). The relative information content of accruals and cash flows: Combined evidence at the earnings announcement and annual report release date. *Journal of Accounting Research*, 2, 165-200.
- Wilson, G.P. (1987, April). The incremental information content of the accrual and funds components of Earnings after controlling for earnings. *The Accounting Review*, 2 293-322.

‘SHADES OF GREY: REVIEWING THE MULTI-LAYERS OF DARK TOURISM’.

Clare Lade
School of Management
Tourism and Hospitality Research Unit
La Trobe University, Australia

ABSTRACT

For as long as people have been travelling, they have been fascinated with sites and attractions or events that are linked in some way with death, suffering, violence or disaster (Stone, 2005). The term ‘dark tourism’ was first created by researchers Foley and Lennon (1996) however, there is evidence of visitation to sites of death and suffering from early in our history. Much debate surrounding the definition, motivations, categories, interpretation and management of dark tourism exists and more attention towards these areas is needed to achieve a greater understanding of the concept (Foley and Lennon, 1996; Sharply, 2005; 2009; Stone, 2005; 2006). From a tourist consumption perspective, the term ‘dark’ does not amplify the multi-layers of dark tourism supply (Stone, 2006). It may be argued that a visit to Auschwitz – Birkenau in Poland or the Killing Fields in Cambodia are not on the same level of ‘darkness’ as a visit to Jim Morrison’s grave in P re Lachaise cemetery in Paris or to a war memorial in Ho Chi Minh City (Miles, 2002). This paper reviews literature relating to discussion of the varying levels of darkness. It attempts to explore the various viewpoints used to describe the multi-layers of dark tourism, from both a supply and demand perspective. The reviewed literature will be used as a basis for further primary research into dark tourism visitor experiences and site management, a subject area often overlooked in the literature (Biran et al, 2011).

KEYWORDS: Dark Tourism; Motivation; Visitation; Supply; Demand

INTRODUCTION

Although Foley and Lennon (1996) have been credited with first creating the term ‘dark tourism’, visitation to sites of death, suffering and disaster is not a new concept. Examples dating back to the Middle Ages and the late eighteenth and early nineteenth century exist, including the battle of Waterloo and travel to watch live hangings and executions (Seaton, 1996; 1999). Various terms for ‘dark tourism’ exist, including thanatourism (Seaton; 1996), grief tourism (O’Neil, 2002), morbid tourism (Blom, 2000) and black spots tourism (Rojek, 1993). While ‘dark tourism’ is a term more commonly used, it doesn’t necessitate a universally accepted definition (Biran et al, in press) and the term ‘continues to remain poorly conceptualized’ (Jamal and Lelo, 2010, p. 32).

Subsequently, more attention towards both the supply and demand of dark tourism is needed to achieve a greater understanding of the concept (Foley and Lennon, 1996; Sharply, 2005; 2009; Stone, 2005; 2006). This paper attempts to explore the various terms and concepts used to describe the multi-layers of dark tourism, from both a

supply and demand perspective. The reviewed literature will be used as a basis for further research into dark tourism visitor experiences and site management, which incorporates elements of both supply and demand.

BACKGROUND TO THE RESEARCH

Defining Dark Tourism

Much debate exists in relation to defining dark tourism including its interpretation, motivations, categories and management of sites. Both supply and demand perspectives need to be understood and considered (Biran et al, in press).

From a supply side perspective, dark tourism is associated with visitation to sites and attractions or events that are linked in some way with death, suffering, violence or disaster (Stone, 2005). This definition recognizes the tourists presence in death associated places, ranging from 'lighter' sites such as the London Dungeon to more 'darker' sites such as the Auschwitz concentration camps (Stone, 2006). Discussion of dark tourism from a supply side perspective provides a rather simplified understanding and fails to identify the variations in inner motives and experiences of the tourist (Biran et al, in press).

From a demand side perspective, dark tourism is associated with the motivations behind tourist visitation. Tourists will 'travel to a location wholly, or partially, motivated by the desire for actual or symbolic encounters with death' (Seaton, 1996, p.240). This viewpoint assumes all visitors have death associated motives and overlooks any additional non death associated reasons for visitation such as education or a 'must see' attraction (Austin, 2002; Hughes, 2008; Biran et al, in press).

The integrated supply-demand perspective considers both the sites attributes along with the experience sought by the tourist (Sharpley, 2009). This viewpoint considers the possibility that not all tourists drawn to dark tourist sites are engaged in a dark experience and other factors may influence visitation, such as scenery or seeking an educational or experiential experience (Austin, 2002; Poria et al, 2004; Smith & Croy, 2005).

This paper attempts to explore the various viewpoints relating to the multi-layers of dark tourism, from both a supply and demand perspective.

Degrees of Dark Tourism

The term 'dark' does not amplify the multi-layers of dark tourism supply (Stone, 2006). Therefore, various degrees or shades have been described in the literature and will be discussed in this paper (Henderson, 2000; Lonely Planet, 2007; Miles, 2002; Seaton, 2006; Stone, 2006; Sharpley, 2005).

The Lonely Planet (2007) published an article on dark tourism in its *Bluelist: The Best in Travel 2007* and raises the proposition of not whether tourists are dark, but exactly how dark are they? A dark-o-meter is used in an attempt to determine the level of 'darkness' ranging from opaque, dark, diehard dark, pitch black to too dark. Consideration of tourist motives is also raised.

Henderson (2000) considers dark tourism shades as two levels of integration. Firstly, where integration is within a broader context to which death occurs and not being in death itself such as tourists being able to fire machine guns and crawl through tunnels at the Cu Chi Tunnels in Vietnam. A second form of integration is where tourists seek to integrate themselves with death via actually witnessing violent deaths such as scenes of disasters, murders or travelling with knowledge of death, such as current war torn countries.

Miles (2002) suggests that a difference exists between 'dark' and 'darker' tourism, reflecting the temporal and spatial variations between visitor sites. For example, a visit to Auschwitz – Birkenau in Poland is not on the same level of 'darkness' as a visit to Jim Morrison's grave in P re Lachaise cemetery in Paris.

Stone (2006) describes dark tourism supply in the form of a spectrum ranging from darkest to lightest forms. This spectrum provides a conceptual framework for exploring the different modes of dark tourism supply and demand (p. 151). Considerations of additional influences for visitation are also made.

Sharpley (2005) discusses a 'continuum of purpose' (p.19) which recognizes four shades of dark tourism ranging from black, pale, grey to grey supply tourism. This concept incorporates elements of demand ranging from accidental to direct exploitation motivations in order to develop a matrix.

CONCLUSION

Dark tourism is a complex phenomenon and one which requires further attention to achieve a greater understanding of the concept (Foley and Lennon, 1996; Sharpley, 2005; 2009; Stone, 2005; 2006). This paper attempts to explore, from both a supply and demand side perspective, the various terms and concepts used to describe the differing degrees, shades or multi-layers of dark tourism that are discussed in the literature. The reviewed literature will be used as a basis for further research into dark tourism visitor experiences and site management which incorporates both supply and demand elements and is an area requiring further research (Biran, et al, in press).

REFERENCES

- Austin, N.K. (2002). Managing heritage attractions: Marketing challenges at sensitive historical sites. *The International Journal of Travel Research*, 4(6), 447-457.
- Biran, A., Poria, Y. & Oren, G. (In Press). Sought experiences at (dark) heritage sites. *Annals of Tourism Research* 22 pages.
- Blom, T. (2000). Morbid Tourism: A postmodern market niche with an example from Althorpe. *Norwegian Journal of Geography* 54: 29-36.
- Foley, M. & Lennon, J. (1996). JFK and Dark Tourism: A fascination with assassination. *International Journal of Heritage Studies* 2: 198-211.
- Henderson, J. (2000). War as a tourist attraction: The case of Vietnam. *International Journal of Tourism Research* 2 (3), 269-280.
- Hughes, R. (2008). Dutiful tourism: Encountering the Cambodian genocide. *Asia Pacific Viewpoint*, 49(3), 318-330.
- Jamal, T. & and Lelo, L. (2010) Exploring the conceptual and analytical framing of dark tourism: From darkness to intentionality. In R. Sharpley, & P.R. Stone (Eds), *Tourism experience: Contemporary perspectives* (pp.29-42). Oxon: Routledge.
- Lonely Planet. (2007). *Lonely Planet BlueList: The Best in Travel 2007*. Footscray: Lonely Planet Publications Pty Ltd.
- Miles, W. (2002) Auschwitz: Museum interpretation and darker tourism. *Annals of Tourism Research* 29 (4), 1175-1178.
- Poria, Y., Butler, R., & Airey, D. (2004). The meaning of heritage sites for tourists: The case of Massada. *Tourism Analysis*, 9(1/2), 15-22.
- Rojek, (1993). *Ways of Escape*. Basingstoke: Macmillian.
- Seaton, (1996). Guided by the dark: From thanatopsis to thanatourism. *International Journal of Heritage Studies* 2:234-244.
- Sharpley, R. (2005). Travels to the edge of darkness: Towards a typology of 'dark tourism'. In C. Ryan, S. Page & M. Aicken (Eds), *Taking tourism to the limits: Issues, concepts and managerial perspectives* (pp.187-198). Amsterdam: Elsevier.
- Sharpley, R. (2009). Shedding light on dark tourism: An introduction. In R Sharpley & P. Stone (Eds), *The darker side of travel: The theory and practice of dark tourism* (pp.3-22). Bristol: Channel View Publications.
- Smith, N. & Croy, G. (2005). Presentation of dark tourism: Te Waoria, the buried village. In C. Ryan S. Page & M. Aicken (Eds), *Taking tourism to the limits: Issues, concepts and managerial perspectives* (pp.187-198). Amsterdam: Elsevier.
- Stone, P. (2005). Dark tourism: An old concept in a new world. *Tourism (London) IV* 3, 18-35.
- Stone, P. (2006). A dark tourism spectrum: Towards a typology of death and macabre related tourist sites, attractions and exhibitions. *Tourism: An Interdisciplinary International Journal* 54(2), 145-160.

CRUISE SHIP OCCUPANCY RATES: A STUDY OF THE NORTH AMERICAN MARKET

Scott A. Lee
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

and

Collin D. Ramdeen
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

ABSTRACT

The Cruise Lines International Association claims that “the cruise industry in the most exciting growth category in the entire leisure market,” and has grown by an average 7.2% each year over the last 20 years (2010). Not only has the industry grown by leaps and bounds, but the ships the cruise lines are building are bigger than ever. Why are the cruise line companies building enormous ships? Are larger ships good for business? Do cruise lines enjoy higher or lower occupancy rates on these new mega-ships? Does size really matter? This paper attempts to answer these questions, by examining occupancy rates of almost 30,000 cruise ship voyages that have sailed on ships ranging in size from 4,253 gross registered tons to over 225,000 gross registered tons. All of the voyages investigated originated in U.S. homeports, but include voyages to the Caribbean, Bahamas, Bermuda, Alaska, Mexico, Hawaii, and even cruises to nowhere.

KEYWORDS: *Caribbean; Cruise line; Occupancy Rate; Passenger; Ship; Size.*

INTRODUCTION

The cruise industry is bigger than ever today. The Cruise Lines International Association claims that “the cruise industry in the most exciting growth category in the

entire leisure market,” and has grown by an average 7.2% each year over the last 20 years (2010). Gibson calls it a “modern day success story” with a virtually untapped market (2008, p.42). Not only has the industry grown by leaps and bounds, but the ships the cruise lines are building are bigger than ever. Klein describes the phenomenon as Viagra for cruise ships (2005). That may be a good analogy considering that Royal Caribbean Cruise Line began its operations with the 18,400 gross ton *Song of Norway* in 1970 (Kalosh, 2008), and today has two ships rated at 225,282 gross tons each (RCCL, 2011). Why are the cruise line companies building enormous ships? Are larger ships good for business? Do cruise lines enjoy higher or lower occupancy rates on these new mega-ships? Does size really matter? This paper attempts to answer these questions, by examining occupancy rates of almost 30,000 cruise ship voyages that have sailed on ships ranging in size from 4,253 gross registered tons to over 225,000 gross registered tons. All of the voyages investigated originated in U.S. homeports, but include voyages to the Caribbean, Bahamas, Bermuda, Alaska, Mexico, Hawaii, and even cruises to nowhere.

The race to have the biggest cruise ship can be traced back to 1985 when Carnival Cruise Lines introduced the 46,000 gross ton *Holiday* and claimed it was “the world’s largest cruise ship” (Klein, 2005, p.14). The *Holiday* carried 1,500 passengers. The game of one-upmanship began three years later when Royal Caribbean Cruise Line unveiled its newest ship, *Sovereign of the Seas*, and marketed it as “the world’s largest cruise ship” (Klein, p.14). In fact, the ability to introduce the newest, biggest ship in marketing efforts is so alluring that Royal Caribbean Cruise Line’s newest ship, the *Allure of the Seas*, is reported to be five centimeters longer than her sister ship, the *Oasis of the Seas*, making the *Allure of the Seas* to be the largest cruise ship ever built (Cruz, 2011).

Although this working paper is brief, the final paper will include a review of the current literature regarding the cruise industry; especially as it relates to the size of cruise ships. The next section in the final paper will explain the methodology used to examine the data. The next section in the final paper will report the results of the analysis of data, and the final paper will also discuss the implications of its findings, as well as recommendations for future research.

LITERATURE REVIEW

The cruise industry has experienced rapid growth in recent years (Sun, Jiao, Tian, 2011), and has become one of the most dynamic and fastest growing segments of the tourism industry (Dwyer, Forsyth, 1998; Wie, 2004; Marti, 2004). For an industry that has demonstrated such ‘explosive growth’, the literature regarding it is ‘surprisingly small’ (Wood, 2000, p.347). Many researchers have lamented the lack of academic research focused on the fast growing cruise line industry (Foster, 1986; Teye and Leclerc, 1998; De La Vina, Ford, 2001; Liburd, 2001; Marti, 2004; Toh et al., 2005; Biehn, 2006; Scantlebury, 2007; Sun, Jiao, and Tian, 2011). In a recent article, Papathanassis and Beckmann performed an extensive review of the cruise tourism literature and identified 145 scholarly articles. However, they also noted many of them were not directly focused on cruise tourism (2011). They suggest that research on the cruise line industry might

have improved from being described as a dearth of research to now being described as fragmented and evolving with some themes emerging in the literature. They identified four specific themes in their analysis: (1) the cruise market, (2) the cruise society, (3) cruises and society, and (4) cruise administration.

Although the quantity of published research has increased over the years, research on cruise administration or how cruise lines manage their staff and vessels is limited. With the exception of ‘generic processes and common practices in cruise textbooks, there is limited management research . . . on cruise operating’ (Papathanassis, Beckmann, 2011, p.165). They go on to suggest that considering the trend of ever increasing capacities for the cruise lines that this specific area ‘will remain relevant and sustain its centrality in academic literature’ (p.164). One reason the cruise line capacities are increasing at such a rapid rate is because they are not only building more ships, but the ships they are also building bigger ships.

Cruise ships have changed significantly from the early days of cruising (Kuki, 2008). Today’s cruise companies are building bigger ships than ever before, which benefit from economies of scale, helping to improve the bottom line for cruise lines (McAlpin, 2007). The increasing size of today’s cruise ship implies an increasing management complexity (Papathanassis, Beckmann, 2011). The cruise companies market their ships as destinations (Lester, Weeden, 2004), and they are increasing their emphasis on the ship being the attraction rather than the destination or ports of call. Over a decade ago, Pattullo (1996) wrote about the insignificance of the Caribbean and its beautiful island destinations to the cruise companies stating, “the Caribbean itself loses relevance except as a vague and shimmering backdrop (p.169).” Pattullo quotes Bob Dickinson, Carnival’s Managing Director, as saying “The limited number of countries and ports offered is not a deterrent to Carnival customers; after all the ship is the attraction, not the port of call.” Today’s cruise passengers want more than a place to sleep, food to eat, and the same tired old places to go. They want new activities and things to do while on vacation (Pizam, 2008).

The larger mega-ships being put into service today have at least two distinct advantages over some of the smaller ships. First, by exploiting economies of scale gained by operating larger vessels, cruise lines are able to keep their operating expenses low, and in turn keep cruise fares for passengers low (Kuki, 2008). Regardless of if a ship has 600 passengers or if a ship has 3,600 passengers, the cruise line only needs to hire one captain to operate a ship. There are many other advantages created by these economies of scale that impact a cruise line’s bottom line. Keeping cruise fares low has transformed cruising from a luxury vacation to one available to the masses. Operating larger ships with improved economies of scale allows the cruise lines to keep fares low and still produce a profit. Secondly, larger ships allow cruise companies the ability to increase on-board revenue opportunities made available by the additional amenities the larger ships can accommodate (Lois, et.al., 2004). Increasing on-board revenue also creates opportunities for cruise line to keep fares low and still turn a profit.

METHODOLOGY

Secondary data regarding individual voyages, including the number of passengers, and dates of sailing, was obtained from the U.S. Maritime Administration and was derived from the U.S. Customs and Border Patrol Vessel Entrance and Clearance documents (U.S.M.A., 2011). Additional secondary data regarding the gross tonnage of individual ships were obtained from multiple cruise line websites and cruise guide books such as the Berlitz Complete Guide to Cruising & Cruise Ships (Berlitz, 2006, 2009, 2011). These data were analyzed using SPSS 18.0.

First, the data regarding individual voyages were analyzed to see what different cruise ships were included in the data. Each cruise ship identified in the data was then investigated in sources of additional data to determine descriptive information about each individual vessel. These data were combined for an improved data set that included data regarding individual voyages and each different cruise ship that embarked on these voyages. The combined data were analyzed by performing a one-way ANOVA. The dependant variable selected was occupancy rate and the independent variable selected was size as determined by gross registered tons.

It is important to include a quick explanation regarding the calculation of the occupancy rate before proceeding further. It may also be of value to note that gross tonnage for a cruise ship has nothing to do with weight, but is a measure of encapsulated volume. However, in the context of this study, an explanation regarding occupancy rates is imperative. It is common in the cruise line industry for a ship to sail with a reported occupancy rate higher than 100%. This is possible because of how the cruise lines calculate occupancy rates. Full occupancy in the cruise line industry is 2 passengers sailing inside each available guest stateroom or cabin. It could be expressed mathematically as:

$$\text{Cruise ship occupancy rate} = \# \text{ of guests} / (\# \text{ of cabins} * 2)$$

However, it is common for many families that cruise together to book a cabin or stateroom for 3 or 4 passengers, sometimes even more for suites. The cruise lines understand that it is important for parents to keep their children close by and offer the opportunity for the whole family to sail in one stateroom. Cruise ships have been built with additional drop-down beds and equipped with roll-away beds and sleeper couches for many years now in order to provide their passengers with the ability to have more than two passengers in many of the staterooms offered onboard. Some ships have been built specifically with this idea in mind. For example, the Disney Magic and Disney Wonder each have 875 staterooms and a lower berth capacity of 1,750 passengers. However, according to the Berlitz Complete Guide to Cruising and Cruise Ships they have the capacity to set sail with 3,325 passengers (Berlitz, 2011). This affords these ships the potential to sail at 190% occupancy according to how the cruise lines calculate occupancy rates. You could compare this to Royal Caribbean Cruise Line's Brilliance of the Seas which has 1,056 staterooms and a lower berth capacity of 2,112. This ship however, has a reported maximum capacity of 2,500, affording it the potential to sail at

118.37% occupancy using the cruise line's formula for calculating occupancy rates. This creates a difficulty when examining the occupancy rates of cruise ships.

In this study, the researcher's calculated a new occupancy rate based off of the reported maximum occupancy for each ship. Although the occupancy rates reported in this study are not congruent with what the cruise line report for their ships, it does account for variances in how each ship is built and examines occupancy rates in light of each ship's maximum capacity.

For the one-way ANOVA analysis, cruise ships were placed into 8 different groups. The first group included ships with less than 30,000 gross registered tons. The second group included ships ranging from 30,000 – 59,999 gross registered tons. The third group included ships ranging from 60,000 – 74,999 gross registered tons. The fourth group included ships ranging from 75,000 – 84,999 gross registered tons. The fifth group included ships ranging from 85,000 – 99,999 gross registered tons. The sixth group included ships ranging from 100,000 – 124,999 gross registered tons. The seventh group included ships ranging from 125,000 – 149,999 gross registered tons. Last, but not least, the eighth group included ships with 150,000 or more gross registered tons. The results of this analysis are reported in the next section of this paper.

RESULTS

The researchers analyzed data collected from 29,746 cruise voyages. The results of the one-way ANOVA show that there was a significant effect of ship size on occupancy percentage, $F(7, 29738) = 557.695, p < .001, \eta^2 = .34$. These data will be reported in table 1. The group with the highest reported mean score (.92) for occupancy percentage was the group of ships with 150,000 or more gross registered tons, and the group with the lowest reported mean score (.81) for occupancy percentage was the group of ships with 30,000 or less gross registered tons. These data will reported in table 2.

CONCLUSIONS AND DISCUSSION

Cruise ships have been called floating hotels (Hall and Braithwaite, 1990), and floating resorts (Wood, 2000), however, the truth is they are floating cities with a number of complex systems operating at once to power the ship and take care of every guest need or care (McAlpin, 2007). The data supports the idea that size does matter when it comes to filling a cruise ship with passengers. But why does size matter? For sure, it is easier to market a new ship that has something unique about it, and being the biggest ever makes it pretty unique. The major cruise line companies have played this game of constantly unveiling the biggest ship for over 25 years. The importance of winning this game was made with an explanation point when Royal Caribbean began operating the Oasis of the Seas in 2009. The point was exacerbated when they built its sister ship, the Allure of the Seas, to be 5 centimeters longer than the Oasis. Of course, at a cost of around \$1.5 billion per ship (Ornstein, 2010), who could blame Royal Caribbean Cruise

Line for squeezing out every possible marketing opportunity? But is it that simple? Is today's cruise passenger only interested in sailing on the biggest ship ever? That is certainly possible, here are two other possibilities.

As a result of the game of one upmanship played by the cruise lines, the biggest ships also tend to be the newest ships. It could be that sailing on a ship with that new ship smell is the important factor rather than sailing on the biggest ship on the seven seas. Another advantage cruise lines have marketing larger ships have over smaller ones is that they can target a much wider group of interested tourists. Larger ships have more amenities and attractions to offer passengers. When Royal Caribbean built their ships in the freedom class, which were the biggest ships at that time, they included a FlowRider surfing simulator on the back of each ship. When they unveiled their Oasis class ships, which were even bigger, they included FlowRider surfing simulators on the back of each ship. But that's not all; these ships also include an AquaTheatre, carousel, seven different neighborhoods, including central park, 24 dining venues, 13 retail venues – including the only free-standing Coach store at sea, four pools, 10 whirlpools, a kid's H2O Aqua Park, sports courts, miniature golf, an exclusively licensed Hairspray Broadway show, the rising tide bar – the first moving bar at sea, which slowly raises and lowers three decks between the Royal Promenade and Central Park, and a zip-line at sea (Ornstein, 2010).

There used to be a saying in the travel industry that cruises are for the newly wed and the nearly dead. Sometimes the saying would be expanded to be that cruises are for the newly wed, the over fed, and the nearly dead. Regardless of which one you may have heard, the point is that cruises were just for a narrowly defined demographic. The larger mega-ships today allow cruise lines appeal to a wide variety of people from young student groups to couples on a honey moon to families with young children to families with older teenagers to grandparents travel with the grand children. It would be easy for a larger mega-ship to be able to more than adequately entertain an extended family that included young children, teenagers, young adults, middle-aged adults, recently retired couples, and grandparents who have gracefully aged.

LIMITATIONS AND RECOMMENDATIONS FOR FUTURE RESEARCH

This study was limited to the data collected, which was solely representative of the North American market. This study was also limited by looking at only one factor, ship size, as it analyzed significant differences in occupancy percentages. The researchers suggest that other factors such as itinerary, age of the ship, the number and kinds of amenities offered onboard, the size of the crew, cruise brand, home ports, etc. be considered for potential future studies.

REFERENCES

Biehn, N., 2006. A cruise ship is not a floating hotel. *Journal of Revenue & Pricing Management* 5, 135-142.

- CLIA, 2010. The Overview: 2010 CLIA Cruise Market Overview., <http://www2.cruising.org/Press/overview2010/>.
- De La Vina, L. & Ford, J., 2001. Logistic regression analysis of cruise vacation market potential: demographic and trip attribute perception factors. *Journal of Travel Research* 39 (May): 406-410.
- Dwyer, L., Forsyth, P., 1998. Economic significance of cruise tourism. *Annals of Tourism Research* 25, 393-415.
- Foster, G.M. 1986. South seas cruise: a case study of a short-lived society. *Annals of Tourism Research* 13, 215-238.
- Gibson, P., 2008. Cruising in the 21st century: who works while others play?. *International Journal of Hospitality Management* 27, 42-47.
Doi:10.1016/j.ijhm.2007.07.005.
- Kalosh, A. 2008. Spectacular Spaces. *Seatrade Cruise Review* June, p.7-11.
- Klein, R.A., 2005. *Cruise ship squeeze: the new pirates of the seven seas*. New Society Publishers. British Columbia, Canada.
- Kuki, 2008. Is the cruise industry changing?. *Cruisemates.com*.
<http://www.cruisemates.com/articles/feature/cruiseindustrychanges-030508.cfm#axzz1LPaukCvx>.
- Lester, J., Weeden, C., 2004. Stakeholders, the natural environment and the future of Caribbean cruise tourism. *International Journal of Tourism Research*, 6, 39-50.
- Liburd, J.J., 2001. Cruise tourism development in the south of St. Lucia. *Tourism: An International Interdisciplinary Journal* 49(3): 215-228.
- Lois, p., Wang, J., et. Al., 2004. Formal safety assessment of cruise ships. *Tourism Management* 25, 93-109.
- Marti, B.E., 2004. Trends in world and extended-length cruising (1985-2002). *Marine Policy* 28, 199-211.
- McAlpin, T. 2007. Personal conversation with Thomas McAlpin regarding the cruise industry.
- Pattullo, P. 1996. *Last Resorts: the cost of tourism in the Caribbean*. Cassell: London.
- Papathanassis, A., Beckmann, I., 2011. Assessing the 'poverty of cruise theory' hypothesis. *Annals of Tourism Research* 38(1), 153-174.
doi:10.1016/j.annals.2010.07.015.

- Pizam, A. 2008. Space tourism: new market opportunities for hotels and cruise lines. *International Journal of Hospitality Management* 27, 489-490. Doi:10.1016/j.ijhm.2008.06.007.
- RCCL. 2011. Ships: why should getting there be only half the fun?. <http://www.royalcaribbean.com/findacruise/ships/home.do?cS=NAVBAR&pnav=2&snav=4>
- Scantlebury, M.G. 2007. Cruise ship tourism. *Annals of Tourism Research* 34(3), 817-818.
- Sun, X, Jiao, Y, Tian, P. 2011. Marketing research and revenue optimization for the cruise industry: a concise review. *International Journal of Hospitality Management*, 30, 746-755. doi:10.1016/j.ijhm.2010.11.007
- Teye, V.B., Leclerc, D., 1998. Product and service delivery satisfaction among North American cruise passengers. *Tourism Management* 19, 153-160.
- Toh, R.S., Rivers, M.J., et al., 2005. Room Occupancies: cruise lines out-do the hotels. *International Journal of Hospitality Management* 19, 153-160.
- U.S.M.A. (2011). Cruise Detail Page. http://www.maradot.gov/library_landing_page/data_and_statistics/Data_and_Statistics.htm
- Ward, D., 2006. *Berlitz complete guide to cruising and cruise ships*. Berlitz Publishing: London.
- Ward, D., 2009. *Berlitz complete guide to cruising and cruise ships*. Berlitz Publishing: London.
- Ward, D., 2011. *Berlitz complete guide to cruising and cruise ships*. Berlitz Publishing: London.
- Wie, B.-W., 2004. Open-loop and closed-loop models of dynamic oligopoly in the cruise industry. *Asia-Pacific Journal of Operational Research* 21, 517-541.
- Wood, R.E., 2000. Caribbean cruise tourism: globalization at sea. *Annals of Tourism Research* 27(2): 345-370

**CRUISE SHIP DESTINATION: AN INVESTIGATION OF CRUISE SHIP
OCCUPANCY RATES OF CRUISE SHIPS SAILING ON DIFFERENT
ITINERARIES**

Scott A. Lee
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

and

Collin D. Ramdeen
School of Resort and Hospitality Management
Florida Gulf Coast University
10501 FGCU Boulevard South
Fort Myers, Florida 33965
USA

ABSTRACT

The Cruise Lines International Association claims that “the cruise industry in the most exciting growth category in the entire leisure market,” and has grown by an average 7.2% each year over the last 20 years (2010). Carnival Cruise Lines recently reported in a press release that they have experienced record bookings, receiving more than 165,000 reservations in one week (CCL, 2011). Not only has the industry grown by leaps and bounds, the number of different sailing itineraries have increased to accommodate this amazing growth of the industry. It used to be when you thought about going on a cruise vacation that you had just a couple of mainstream itinerary choices: Caribbean and Alaska. Today, there are fifteen distinct itineraries available for North American passengers to set sail on. But why do the cruise lines choose to offer different itineraries? Do cruise ships enjoy higher occupancy rates when sailing on some itineraries compared to others? This paper attempts to answer these questions, by examining occupancy rates of almost 30,000 cruise ship voyages that have sailed on ships ranging in size from 4,253 gross registered tons to over 225,000 gross registered tons. Voyages that set sail on fifteen different cruise ship itineraries are investigated in this study. All of the voyages investigated originated in U.S. homeports, and include voyages to the Caribbean, Bahamas, Bermuda, Alaska, Mexico, Hawaii, and even cruises to nowhere.

KEYWORDS: *Caribbean; Cruise Line; Itinerary; Occupancy Rate; Ship; Voyage.*

INTRODUCTION

The Cruise Lines International Association claims that “the cruise industry in the most exciting growth category in the entire leisure market,” and has grown by an average 7.2% each year over the last 20 years (2010). Gibson calls it a “modern day success story” with a virtually untapped market (2008, p.42). Carnival Cruise Lines recently reported in a press release that they have experienced record bookings, receiving more than 165,000 reservations in one week (CCL, 2011). Not only has the industry grown by leaps and bounds, the number of different sailing itineraries have increased to accommodate this amazing growth of the industry. It used to be when you thought about going on a cruise vacation that you had just a couple of mainstream itinerary choices: Caribbean and Alaska. Today, there are fifteen distinct itineraries available for passengers to set sail on. But why do the cruise lines choose to offer different itineraries? Do cruise lines only pay attention to logistical issues when choosing which itineraries to offer passengers, or do cruise ships enjoy higher occupancy rates when sailing on some itineraries compared to others? This paper attempts to answer these questions, by examining occupancy rates of almost 30,000 cruise ship voyages that have sailed on ships ranging in size from 4,253 gross registered tons to over 225,000 gross registered tons. Voyages that set sail on fifteen different cruise ship itineraries are investigated in this study. All of the voyages investigated originated in U.S. homeports, and include voyages to the Caribbean, Bahamas, Bermuda, Alaska, Mexico, Hawaii, and even cruises to nowhere. Some itineraries, such as cruises to nowhere, are somewhat limited; and some itineraries, for example the Caribbean, are quite popular. The Caribbean continues to rank as the dominant cruise destination in the world, accounting for 41.3% of all itineraries in 2010 (FCCA, 2011).

Although this working paper is brief, the final paper will include a review of the current literature regarding the cruise industry; especially as it relates to itineraries embarked upon from North American homeports. The next section in the final paper will explain the methodology used to examine the data. The next section in the final paper will report the results of the analysis of data, and the final paper will also discuss the implications of its findings, as well as recommendations for future research.

LITERATURE REVIEW

The cruise industry has experienced rapid growth in recent years (Sun, Jiao, Tian, 2011), and has become one of the most dynamic and fastest growing segments of the tourism industry (Dwyer, Forsyth, 1998; Wie, 2004; Marti, 2004). For an industry that has demonstrated such ‘explosive growth’, the literature regarding it is ‘surprisingly small’ (Wood, 2000, p.347). Many researchers have lamented the lack of academic research focused on the fast growing cruise line industry (Foster, 1986; Teye and Leclerc, 1998; De La Vina, Ford, 2001; Liburd, 2001; Marti, 2004; Toh et al., 2005; Biehn, 2006; Scantlebury, 2007; Sun, Jiao, and Tian, 2011). In a recent article, Papathanassis and Beckmann performed an extensive review of the cruise tourism literature and identified 145 scholarly articles. However, they also noted many of them were not directly focused on cruise tourism (2011). They suggest that research on the cruise line industry might

have improved from being described as a dearth of research to now being described as fragmented and evolving with some themes emerging in the literature. They identified four specific themes in their analysis: (1) the cruise market, (2) the cruise society, (3) cruises and society, and (4) cruise administration.

Although the quantity of published research has increased over the years, research on cruise administration or how cruise lines manage their staff and vessels is limited. There are some academic articles in the literature regarding different regions that cruise ships frequent on their itineraries, and some of these attempted to investigate the impacts of cruise ships on these different regions, none were found that investigated the significant differences in cruise ship occupancy rates across multiple itineraries to different regions and the management decisions affected by the significant differences and possible effects different itineraries have on cruise ship occupancy rates.

Today's cruise passengers want more than a place to sleep, food to eat, and the same tired old places to go. They want new activities and things to do while on vacation (Pizam, 2008). New activities can be found on newer bigger ships, but they can also be found in new interesting ports of call. Although Pattullo described over a decade ago the belief within the ranks of cruise line executives that the ships are more so the attraction than the ports of call (1996), it is widely accepted that the ports of call provide opportunities for cruisers to enrich their travel experience by immersing passengers in new a different cultures (Fanning, James, 2006). The reality is that itinerary planning involves both a cruise line's historical experience with particular ports and passenger expectations (Ippoliti, 2008).

METHODOLOGY

Secondary data regarding individual voyages, including the number of passengers, dates of sailing, and specific sailing itineraries was obtained from the U.S. Maritime Administration and was derived from the U.S. Customs and Border Patrol Vessel Entrance and Clearance documents (U.S.M.A., 2011). Additional secondary data regarding additional information on individual ships were obtained from multiple cruise line websites and cruise guidebooks such as the Berlitz Complete Guide to Cruising & Cruise Ships (Ward, 2006; Ward, 2009; Ward, 2011). These data will be analyzed using SPSS 18.0. Significant differences (if found) in ship occupancy rates will be reported in the completed paper and conclusions regarding why different sailing itineraries may matter will also be discussed in the final paper.

PRELIMINARY RESULTS

Mean occupancy rates for North American voyages were 109%. The researchers created dummy variables for each itinerary in the model. An analysis of the model produced shows that cruise ship itinerary was significant. These data are presented in table 1. Cruise Itinerary explained a significant proportion of the variance in occupancy rate, $\Delta R^2 = .23$, $F(15,30406) = 620.5$, $p < .001$.

Table 1: Regression Coefficients for Different Cruise Itineraries

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	N
	B	Std. Error	Beta			
(Constant)	1.249	.005		271.421	.000	
Alaska	-.198	.005	-.456	-39.226	.000	3431
Bahamas	-.073	.005	-.188	-14.756	.000	4551
Bermuda	-.174	.006	-.209	-28.176	.000	883
Canada/New England	-.225	.006	-.245	-34.762	.000	688
Eastern Caribbean	-.176	.005	-.422	-35.180	.000	3813
Hawaii	-.236	.006	-.305	-39.456	.000	1027
Mexico (Pacific)	-.147	.005	-.323	-28.873	.000	3189
Nowhere	-.227	.016	-.076	-14.425	.000	64
Pacific Coast	-.265	.010	-.158	-27.759	.000	205
South America	-.332	.013	-.142	-26.340	.000	104
South Pacific	-.411	.012	-.178	-33.049	.000	107
Southern Caribbean	-.224	.005	-.456	-43.307	.000	2572
Trans-Panama Canal	-.313	.007	-.320	-46.780	.000	605
Trans-Atlantic	-.362	.007	-.368	-53.930	.000	606
Western Caribbean	-.133	.005	-.436	-27.902	.000	8577

REFERENCES

- Biehn, N., 2006. A cruise ship is not a floating hotel. *Journal of Revenue & Pricing Management* 5, 135-142.
- CLIA, 2010. The Overview: 2010 CLIA Cruise Market Overview., <http://www2.cruising.org/Press/overview2010/>.
- CCL, 2011. Carnival Cruise Lines Reports Record Booking Week, Receiving More than 165,000 Reservations. <http://carnivalpressroom.wordpress.com/2011/02/15/carnival-cruise-lines-reports-record-booking-week-receiving-more-than-165000-reservations/>
- De La Vina, L. & Ford, J., 2001. Logistic regression analysis of cruise vacation market potential: demographic and trip attribute perception factors. *Journal of Travel Research* 39 (May): 406-410.
- Dwyer, L., Forsyth, P., 1998. Economic significance of cruise tourism. *Annals of Tourism Research* 25, 393-415.
- FCCA, 2011. Cruise industry overview – 2011. http://www.f-cca.com/downloads/2011-overview-book_Cruise%20Industry%20Overview%20and%20Statistics.pdf

- Fanning, C. James, J., 2006. When one size doesn't fit all. In Dowling, R.K. (Ed.), *Cruise Ship Tourism* (pp.86-94). Cambridge, MA: CABI.
- Foster, G.M. 1986. South seas cruise: a case study of a short-lived society. *Annals of Tourism Research* 13, 215-238.
- Gibson, P., 2008. Cruising in the 21st century: who works while others play?. *International Journal of Hospitality Management* 27, 42-47.
Doi:10.1016/j.ijhm.2007.07.005.
- Ippoliti, R.M., 2008. Cruise Line Itinerary Planning.
<http://www.cruisemates.com/articles/feature/HALItineraryPlanning-031408.cfm#axzz1MMAvSYLD>.
- Liburd, J.J., 2001. Cruise tourism development in the south of St. Lucia. *Tourism: An International Interdisciplinary Journal* 49(3): 215-228.
- Marti, B.E., 2004. Trends in world and extended-length cruising (1985-2002). *Marine Policy* 28, 199-211.
- Pattullo, P. 1996. *Last Resorts: the cost of tourism in the Caribbean*. Cassell: London.
- Papathanassis, A., Beckmann, I., 2011. Assessing the 'poverty of cruise theory' hypothesis. *Annals of Tourism Research* 38(1), 153-174.
doi:10.1016/j.annals.2010.07.015.
- Pizam, A. 2008. Space tourism: new market opportunities for hotels and cruise lines. *International Journal of Hospitality Management* 27, 489-490.
Doi:10.1016/j.ijhm.2008.06.007.
- Scantlebury, M.G. 2007. Cruise ship tourism. *Annals of Tourism Research* 34(3), 817-818.
- Sun, X, Jiao, Y, Tian, P. 2011. Marketing research and revenue optimization for the cruise industry: a concise review. *International Journal of Hospitality Management*, 30, 746-755. doi:10.1016/j.ijhm.2010.11.007
- Teye, V.B., Leclerc, D., 1998. Product and service delivery satisfaction among North American cruise passengers. *Tourism Management* 19, 153-160.
- Toh, R.S., Rivers, M.J., et al., 2005. Room Occupancies: cruise lines out-do the hotels. *International Journal of Hospitality Management* 19, 153-160.

- U.S.M.A. (2011). Cruise Detail Page.
http://www.marad.dot.gov/library_landing_page/data_and_statistics/Data_and_Statistics.htm
- Ward, D., 2006. Berlitz complete guide to cruising and cruise ships. Berlitz Publishing: London.
- Ward, D., 2009. Berlitz complete guide to cruising and cruise ships. Berlitz Publishing: London.
- Ward, D., 2011. Berlitz complete guide to cruising and cruise ships. Berlitz Publishing: London.
- Wie, B.-W., 2004. Open-loop and closed-loop models of dynamic oligopoly in the cruise industry. *Asia-Pacific Journal of Operational Research* 21, 517-541.
- Wood, R.E., 2000. Caribbean cruise tourism: globalization at sea. *Annals of Tourism Research* 27(2): 345-370

Tourism Competitiveness Index: The Case of Central America

Robertico Croes
Rosen College of Hospitality Management
University of Central Florida

and

Marketa Kubickova
Rosen College of Hospitality Management
University of Central Florida

ABSTRACT

The objective of this study is to suggest an alternative method for measuring tourism competitiveness. Measuring tourism competitiveness is attracting heightened attention. Most studies have employed a method based on inputs including a myriad of indicators. Most developing countries lack, however, such an elaborate list of indicators. Additionally, the study argues that the inputs method is an inadequate measure of tourism competitiveness in the context of developing countries. It suggests an alternative method based on tourism outputs (results) which inform better the democratic debate on policy choices in developing countries. The study presents the method and findings as they apply to Central American countries.

KEYWORDS: Central America, competitiveness, developing nations, Tourism competitive index (TCI)

INTRODUCTION

Tourism competitiveness has received heightened attention recently because the supply of tourism products has increased significantly over time. Competitive advantage attempts to explain why some countries specialize in tourism (Gooroochurn & Sugiyarto, 2005). Most studies embracing competitive advantage identify a number of variables in examining international tourism flows. These studies have succeeded poorly in explaining international ranking of destinations.

The literature regarding tourism competitiveness is riddled with definitional and measurement issues. The core conceptual work is based on the studies of Crouch and Ritchie (Crouch & Ritchie, 1999; Ritchie & Crouch, 1993, 2000, 2003; Ritchie, Crouch, & Hudson, 2001). Their work shaped the theoretical and conceptual foundations for the tourism competitiveness literature. They defined competitiveness as "...[the] ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations" (Ritchie & Crouch, 2003, p.2). The conceptual foundations of competitiveness theory are contested by Krugman (1996) who questions the usefulness of

the concept based on the theory of comparative advantage. Lall (2001) also asserts that the concept makes sense only under condition of market failures.

And yet, destinations are confronting increasing competition requiring destination managers to engage in prioritization of actions and deciding in the allocation of resources that will benefit tourism development. Competitiveness could be defined therefore as the ability and capacity to grow sustainably in competing and new markets. Therefore, determining the level of competitiveness of destinations is important to measure the performance of a destination compared to its competitors. Tourism according to this criterion is assessed through the results (e.g., arrivals, receipts) obtained by the destination. Results reflect the inputs (skills, learning curve, technology and strategies) invested in realizing the desired outcomes.

Competitiveness has been conventionally measured through indices. An example is the travel and tourism competitiveness index (TTCI) launched by the World Economic Forum (WEF, 2007). The TTCI is the most popular tool to rank countries in terms of their tourism performance. Yet, the TTCI seems more a systematic collection (comprehensive notwithstanding) of data than a model that reveals clear testable association among variables thereby facilitating inferential analysis. For example, the Crouch and Ritchie model is based on the premise of potential cause-and-effect relationships similar to other indices. It is not clear how this potential is transformed into ability. Neither the dependent variable(s) nor the independent variables are clearly stated in the model. From this perspective, the TTCI does not contribute to theory development.

The existing indices require countries to collect data based on a myriad of indicators, such as price and human factors, while there is no direct association between these indicators and the competitive level (outcome) of the countries (Mazanec et al, 2007). The information requirements from those indices are based on the assumption that inputs can reflect outcome expectations. For example, good roads, infrastructure, or heritage assets can predict attraction thereby resulting in increased arrivals. The nexus inputs-outputs are not automatic in the case of developing countries. The nexus inputs-throughput-outputs are blurred due to the existence of market imperfections in the production and consumption of the tourism product amplified by institutional weaknesses in developing countries (Croes 2011; Lall 2001). Even if the throughput process in developing countries is not riddled by market imperfections, most developing countries would lack such an elaborate list of indicators as required by several indices.

The quality of timely, accurate and accessible data is crucial in the planning and development of tourism. This is not only because of the need of promoting quality tourism products to keep up with increasing competition, but also on its impact of government budgets of developing countries. Developing countries in particular have embraced tourism as a development strategy to reduce poverty and therefore need timely and accurate information how tourism is affecting poverty reduction. Therefore simple models that can provide a quick snapshot of reality are crucial for developing countries in their quest for development.

Croes (2011) suggested a shift from measuring competitiveness by considering inputs to measuring competitiveness through outputs which allows for comparisons of tourism performance over time. Croes (2011) suggested a model based on rational choice theory where value is defined in terms of use, such as the value resulting from visiting a

particular destination. The Croes model is characterized by its simplicity, by the wide ranging effects of the indicators and by the minimum data requirements.

This study draws from Croes's perspective to apply his TCI to the Central American region and compares the respective performance of each country within the Central American region. This region has embraced tourism as a development strategy to reduce poverty and enhance development in the Central America countries. These countries have engaged in restructuring their economies away from traditional agriculture and towards services and manufacturing. This restructuring was necessary in view of the declining competitiveness of the agricultural sector and the need to improve competitiveness in non-traditional sectors. Consequently, the region has recently become an active participant in attracting tourism. Tourism development has been uneven in the region with some countries having a longer history of tourism development than others. Similarly, some have been more successful in attracting tourists than others (Hammill, 2007). The ranking of the TCI will then be compared to the TTCI ranking as it pertains to the Central American countries.

LITERATURE REVIEW

Competitiveness:

A review of the literature on tourism competitiveness reveals three discernable strands: (1) the first strand refers to those studies diagnosing positions of specific destinations (case studies); (2) those studies which assess the determinants of competitiveness, and (3) those studies which attempt to develop models and provide a theoretical foundation to competitiveness. Destination competitiveness is a compound topic, and its complexity becomes clear when we try to define it (Crouch & Ritchie, 1999; Ritchie & Crouch, 2000). Evaluation of competitiveness has been mainly based on two economic principles, namely efficiency and performance. Efficiency measures the production capabilities of firms, sectors or destinations (e.g., countries), while performance is based on results. For example, the TTCI alluded to previously is undergirded in the efficiency principle.

The TTCI consists of 72 variables, grouped in three categories: regulatory framework; business, environment and infrastructure; and human, cultural and natural resources. Each of these categories is subdivided in components for a total of 14 pillars. The measurement of the variables is based on either soft data (i.e. opinion survey of executives) or hard data (secondary data from international organizations and central banks). The rank of each of the 124 participating countries is an unweighted average of the 14 pillars. The TTCI has been criticized, among other things, for lacking a scientific underpinning that it is not testable in empirical research and for considering the sample of countries as homogeneous without taking into account size and product life cycles. For example, while the proportion of the international tourism flows to developing countries has significantly increased since the 1950s, there has been hardly any variance in the international ranking between advanced countries and developing countries.

Moreover in its application to developing countries, the method of the TTCI seems intractable, data requirements are difficult if not impossible to produce, and countries are omitted without any explanation. For example, in the case of Central America, Belize has been systematically left out from the WEF ranking.

Tourism Competitiveness Index

Consequently, the Tourism Competitiveness Index (TCI) developed by Croes (2011) was selected for this study as his model utilizes outputs rather than inputs and data requirements are more suitable for developing countries. The TCI index is composed of three outputs, each portraying different aspects of the industry's productivity: first, current performance in the global tourism market scale by size; second, dynamism of performance over time (growth rate); third, size of the industrial base in the economic structure. Tourism receipts per capita, average tourism receipts growth rates, and tourism added values as percentage of the GDP were used as variables representing these three outputs (Croes, 2011). The three variables were weighted 40%, 30%, and 30% rather than equal thirds, given the interest in current performance and the need to account for the size of each country. The three outputs, according to the Croes model, employ different aspects of the industry's productivity through the concept of utility, consequently permitting the creation of a quick snapshot of destination's position in terms of competitiveness. In addition, it allows the researchers to collect an adequate number of variables to analyze competitiveness especially in developing countries as previous studies required large number of variables, often unavailable in such destinations.

For developing countries, such as those in Central America, focusing only on three variables is a tractable method. The method is simple in construction; the indicators are wide ranging (trade and value-added) and the indicators can be easily compared internationally. The main premise of the study is that the construction of indices of performance is important for the democratic debate on policy choices regarding tourism trends. Reasonable people can disagree on policy evaluation and therefore it is critical for democracy (particularly in developing countries) to provide the opportunity to know why one policy choice is selected over another policy choice.

The Central American Region:

Central America consists of Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. Currently, the region is moving from traditional agriculture to predominantly service-based industries. In particular, tourism has emerged as a primary development strategy for Central America (RIE, 2010). Between 2000 and 2008 Central America experienced 8.4% growth in international tourists' arrivals, the highest rate among the world (UNWTO, 2010). In 1996, the Declaration of Montelimar was signed to recognize tourism as a central force for global competitiveness and to increase diversification of the economies (RIE, 2010). Tourism in developing countries is recognized as a main export category and key source of income, creating much needed employment and opportunities for development (UNWTO, 2010). Because of the growth rate of tourism, Central American countries need to have a better understanding of the tourism industry.

METHOD

Data collection

Given the nature of the study secondary data were collected from the World Tourism Organization (WTO), World Bank (World Bank, 2011), and National Master

(National Master, 2011). The data used for this study covered the period from 1996 to 2008.

Specifically, the following data were collected: (1) International tourism receipts growth rate, (2) Tourism added value as a percentage of GDP, and (3) Tourist receipts per arrival in US dollars. In terms of arrivals, only international tourists were taken into consideration as opposed to visitors. Visitors are defined as combination of tourists and same-day, non-residents visitors according to WTO. For the purpose of this study, only international tourists, those that stay at least one night and are non-residents, were taken into consideration, according to the WTO. In addition, data were not available for tourists' arrivals for Belize in 1996 and 1997. Therefore an average of two years prior and two after were taken into consideration and an estimate was calculated.

Data analysis

After data were collected, an index value was estimated for each variable based on the following formula suggested by Croes (2011):

$$X_{ci} = \frac{X_{ci} - X_{c \text{ mini}}}{X_{c \text{ maxi}} - X_{c \text{ mini}}}$$

where c represents country and i represents the variable. The values for each variable are presented in Table 1. The closer the variable to one, the more competitive the destination is and therefore, the higher rank it exhibits. Rank one in this study represents the most competitive destination and rank seven characterizes the least competitive destination. Once values were established, the mean was used to determine the ranking for each country. The three variables were weighted 40:30:30, where tourism receipts per capita were weighted 40; average tourism receipts growth rates 30; and tourism added value as a percentage of the GDP 30. Once the three indices were estimated, the ranking of the seven Central American destinations was determined.

RESEARCH RESULTS

After analyzing the data, a TCI was established for Central America (Table 1).

Table 1. TCI for Central America

<i>Country</i>	<i>Tourism Competitiveness Index (TCI)</i>	<i>Rank</i>	<i>Tourist receipt per arrival</i>	<i>Rank</i>	<i>Tourism added value ration of GDP</i>	<i>Rank</i>	<i>Growth rate of tourism receipts</i>	<i>Rank</i>
Panama	0.633	1	0.992	1	0.229	3	0.558	1
Belize	0.565	2	0.358	3	1	1	0.407	6
Costa Rica	0.522	3	0.725	2	0.456	2	0.317	7
Honduras	0.295	4	0.252	6	0.127	4	0.519	2
El Salvador	0.294	5	0.298	4	0.067	6	0.514	3

Guatemala	0.261	6	0.254	5	0.084	5	0.447	4
Nicaragua	0.125	7	0	7	0.003	7	0.414	5

The findings indicate some surprising results. Based on the conventional measurement of tourism competitiveness employed by the TTCI, Costa Rica and Guatemala ranked higher than the other Central American markets. For example, in the 2009 TTCI Costa Rica ranked 42 compared to 55, 83, 94 and 103 Panama, Honduras, El Salvador and Nicaragua, respectively. Guatemala ranked higher than Panama. The alternative method that this study employed, however, tells a different story. Panama is on top of the list while Belize, which was conspicuously absent from previous studies, ranked second. Panama and Belize enjoyed a higher spending per arrival than the other five Central American countries, including Costa Rica, which suggest that the tourism product of Panama and Belize is more valued than the product of Costa Rica. While Costa Rica had a higher market share in terms of tourism arrivals, spending seemed lacking indicating a value problem.

This value problem could either be a result of the destination life cycle or a reflection of the type of tourism offerings of a destination. Costa Rica, being a more matured destination than Panama and Belize, could be suffering from higher production costs than the other two destinations, being compelled to entertain higher prices than the other destinations. For example, Costa Rica scores lower in terms of price competitiveness (57) compared to Panama (33), according to the 2009 TTCI index. Or, the value problem could be a manifestation of the lower productivity of an eco-tourism product compared to a mixed offering destination as Panama (eco-tourism, shopping, meetings and conventions).

Another surprising finding is the low ranking of Guatemala. While Guatemala has become one of the envy countries in Central America in terms of infrastructure, such as airport, institutions, business sophistication and labor market efficiency, Guatemala has not been able to capture a higher spending of the tourists compared to Panama and Belize. When Guatemala is compared to Panama, Guatemala received about 20% of all tourist arrivals to Central America, compared to 12% for Panama between 2000 and 2008. However, when we look into the currencies generated by these tourists, Guatemala received on average only 16.5% compared to 23% for Panama during that same time period. It can be concluded that Panama is able to capture more money spent by tourists in the destination as opposed to Guatemala.

Such a gap can be shaped by two factors. First, those tourists that are attracted to Guatemala do not enjoy high disposable income. A second assumption can be made that those tourists visiting do not enjoy the product they receive when visiting Guatemala and therefore their spending is lower during their stay. Therefore, it is believed that the TCI seems a more suitable measurement for competitiveness as it looks into the buying power of tourists. A destination that has a new airport or an excellent infrastructure does not necessary guarantee that tourists will come and spend money.

CONCLUSION AND IMPLICATION

The purpose of this study was to create a tourism competitiveness index that is more suitable to the Central American countries. While the TTCI methodological approach develops a comprehensive and systematic data set on destination competitiveness, its suitability and validity is ambiguous. The literature reviewed indicated that Central American nations do not have an adequate competitive index that would allow them to compare themselves against each other and to assess their competitiveness relative to their capacity to realize their own development goals.

The TCI seems to reflect better the 'ability' of destinations to provide 'memorable experiences'. It facilitates a quick assessment of a destination's performance in its quest for growth (dynamic approach of performance) and it provides meaningful information to the Central American countries in guiding their democratic debate regarding policy choices. Finally, it sets the foundation for testable hypotheses by aligning the index (performance) with the ability of a destination to provide memorable experiences as the dependent variable. The index founded on outcomes is the manifestation of competitiveness. Future research could investigate the determinants of competitiveness (outcomes) and how competitiveness is linked to the quality of life.

REFERENCES

- Croes, R. (2011). Measuring and Explaining Competitiveness in the Context of Small Island Destinations. *Journal of Travel Research* 50(4), 431-442.
- Crouch, G. I., & Ritchie, J. R. B. (1999). Tourism, Competitiveness, and Societal Prosperity. *Journal of Business Research*, 44 (3), 137-152.
- Gooroochurn, N., & Sugiyarto, G. (2005). Competitiveness indicators in the travel and tourism industry. *Tourism Economics*, 11 (1), 25-43.
- Hammill, M. (2007). *Growth, poverty and inequality in Central America*. Mexico: CEPAL.
- Krugman, P. (1996). Making sense of the competitiveness debate. *Oxford review of economic policy*, 12 (3), 17-25.
- Lall, S. (2001). Competitiveness indices and developing countries: An economic evaluation of the global competitiveness report. *World Development*, 29 (9), 1501-1525.
- Mazanec, J. A., Wober, K. & Zins, A. H. (2007). Tourism destination competitiveness: From definition to explanation. *Journal of Travel Research* 46(1), 86-95.
- National Master (2011). Retrieved from www.nationalmaster.com.
- RIE (2010). Real Instituto Elcano. Retrieved from <http://www.realinstitutoelcano.org>.
- Ritchie, J. R. B., & Crouch, G. I. (1993). *Competitiveness in international tourism: A framework for understanding and analysis*. Annual Congress of the International Association of Scientific Experts in Tourism, Baliloché, Argentina.
- Ritchie, J. R. B., & Crouch, G. I. (2000). The competitive destination: A sustainability perspective. *Tourism Management*, 21, 1-7.
- Ritchie, J. R. B., Crouch, G. I., & Hudson, S. (2001). *Developing operational measures for the components of a destination competitiveness/sustainability model: consumer versus managerial perspectives*. In Mazanec, J. A., Crouch, G. I., Ritchie, J. R.

B., & Woodside, A. G. (Ed), Consumer psychology of tourism, hospitality and leisure (pp. 1-18). New York, NY: CABI.

Ritchie, J. R. B., & Crouch, G. I. (2003). *The Competitive Destination, a Sustainable Tourism Perspective*. Wallingford, UK: CABI.

UNWTO (2010). *Tourism 2020 Vision*. Retrieved from <http://www.unwto.org>.

WEF (2007). Retrieved from www.weforum.org/.

World Bank (2011). Retrieved from <http://www.worldbank.org/>.

WTO (2010). *Tourism and travel-related services*. Retrieved from <http://www.wto.org/>.

SUSTAINABLE TOURISM: AN EXPLORATION OF PAST, PRESENT, AND FUTURE TRENDS AND ISSUES

Lena R. McArthur
Academy of Hospitality & Tourism
Miami Norland Senior High School, USA

ABSTRACT

As I continue to work in the hospitality field and travel around the United States and neighboring countries; the use of sustainable resources in the tourism industry are rather scarce. Researching and exploring local tourist areas in Florida has afforded me with the opportunity to pose the following questions: What is sustainable tourism? How can we increase its use and decrease the natural disasters that are causing our wastelands to diminish? Additionally, how can everyone benefit in this spiraling downfall recession that has economically devastated our society by augmenting the use of ecological goods? This paper will provide background information on the growth of tourism over the past fifty years and how it has flourished in the 21st century. Additionally, evidence will be provided on the use of sustainable goods and the benefit it has on our environmental organization and pecuniary productivity. This paper will encompass the use of referred journal findings along with detailed accounts of personal statements from tourism corporations within the research. In summation, prospective individuals that are interested in increasing their knowledge in sustainable tourism will truly benefit from reading this study.

KEYWORDS: Sustainable Tourism, Equitable Distribution, Eco-Tourism, Environmental Sustainability, Electronic Commerce, Nature-based Tourist

INTRODUCTION: Trends and Issues in Sustainable Tourism

A trend provides a path for us to follow from the present world into the future world (Cornish, 2004). I feel that a trend is the ability to forge forward in a particular manner towards a pathway that will encompass a direction in mind. In order to understand the process of a trend, it is important to be able to know what the path is and begin to submit to succeeding towards it. On the other hand, a trend analysis is a concept which takes that trend and aligns it with other similar measures over a period of time. For example, crime in public schools is a trend that continues to evolve throughout our ecosphere. Many people have suffered at the hands of misguided teenagers as well as outsiders who do not value human life. Now, let us take that trend and compare it to similar crimes throughout our country within the public school system. The subsets that are examined are then measured; this is the analysis of that trend. Cornish (2004) states that a trend analysis modifies: Demography, Economy, Government, Environment, Society and Culture and Technology (DEGEST) systems. This process will allow

multiple scenarios within the category researched so that the targeted issue may be evaluated for future study and rectifications.

Sustainable Tourism

Sustainable tourism has been a topic since the early 1970's. During that time, there was a United Nations Conference on Human Environment issues; which was surrounded by the ability to increase the efficacy in economic development without the possibility of destroying the environment. This would augment the capability of utilizing sustainable goods to increase the travel market. During this process, there still was the option of insufficiency and degradation. Would this cause damage to our wastelands? Will tourist protect the environment during traveling? Looking at the three dimensional core, sustainable tourism typically consists of economic, social and environmental sustainability (Figure 1A <http://www.iucn.org/programme/>).



Figure 1A. Overlapping Circles

Everyone is involved in sustainable tourism and the need to upsurge cognizance is imminent. It is our duty to ensure that the needs to understand sustainability has come to pass and the trends of sustainability are becoming scarce. In order to shape the framework into an actual model of growth, incorporating political sustainability will help encompass the aspect of governmental concerns to traveled locations. This will increase assurance aligned with the presented ideologies: Economic, Social, Environmental and Political dominions; which are put into place as a guide to organize presented issues that may arise during traveling (http://www.xolaconsulting.com/Aabo_David_Adventure_Service_Tourism.pdf).

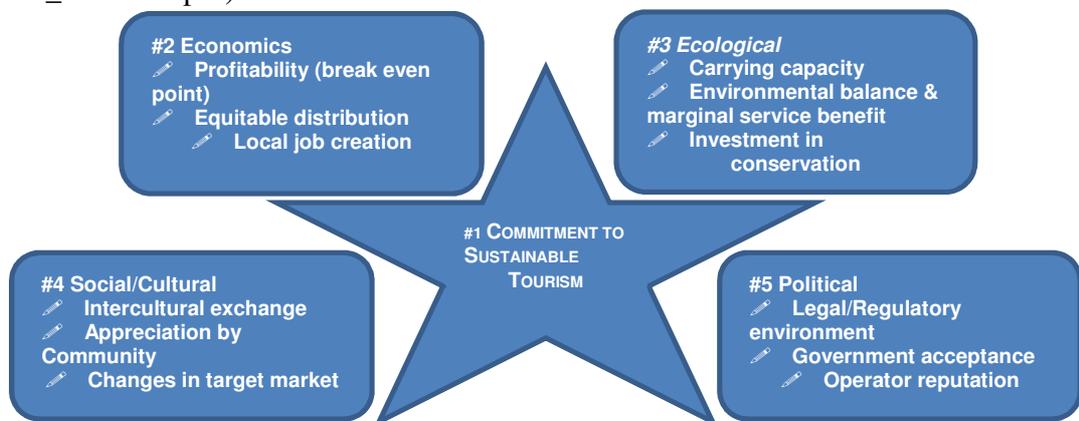


Figure 2A. Issues in Sustainable Tourism

Sustainable tourism provides tourists with the ability to enjoy their travel by affording them with opportunities to take vacations with low impact of social, economic and cultural ramifications. Additionally, sustainable tourism is maintaining a clean, safe and welcoming environment that is protected by the host city and traveling guest. This also allows each economically impacted city the ability to generate income and employment for their communities. Information addressed and presented on sustaining tourism involve issues such as the management of natural, manufactured, and culturally socio-assets and finding ways to preserve natural capital, while ensuring that the well-being of all travelers are accommodated physically, mentally and emotionally (Butler, 1991). Sustainable tourism is a great way to revitalize the economy by providing travelers with the finest and precise travel destination may have to offer. Taking that experience and indulging in surveys, conversations and responses to family, friends and neighbors, increases the tourism output for the economy and creates a multitude of business for the traveled destination. One of the greatest ways to measure sustainable tourism is the number of people that travel, time and money spent and knowing that the traveler is provided with the highest quality of satisfaction.

Past Trends of Sustainable Tourism

After World War II, travel and tourism quickly became one of the world's largest and fastest growing activities, and the construction of hotels kept pace with these development. Between 1948 and 1975, rooms available in the United States increased 80% (Gartner, 1996). The common method of tourism was limited to train or bus as most travelers utilized these forms of transportation. Harssel (1986) stated that President Reagan signed a law in 1982 deregulating all bus companies operation between cities and across states lines and bus lines began to choose their own destinations and pick-up stops. During the stagecoach era, most modern major roads in the United States and Europe had boarding houses built where travelers were, for most part, the wealthier clients. People loved to travel no matter what the reason was and this trend increased as time passed. New and exciting forms of travel emerged and the growing types of activities began to form as eco-tourism materialized. The advancement of types of travel and communication was unveiled; which opened the door for many more people to travel.

Many negative factors were initiated due to ethnicity and gender. As the travel industries began to evolve, African Americans were not able to partake in many forms of travel and tourism. The travel industry was stagnated because African Americans began to host their own travel needs as wide-spread activities emerged. This was truly a loss for many of the businesses, so revised travel restrictions were implemented; which gave African Americans the opportunity to utilize most means of travel with limited functionality.

Then, travel plummeted in all markets during 1990 to 1995 due to the Gulf War and a poor global economy (Hawkins & Lamoureux, 2001). This caused a shift in the paradigm of travel as businesses all over the world tried to find ways to attract people and have them traveling again. Then, during the late 1990s to 2000, the travel industry sought and obtained certification and accreditation. The travel industry begin to progress as the development of new ways to entice travelers was beginning to spiral upwards.

Additionally, during this time, the need for travel was at a high demand. In order to attract travelers, travel destinations had to increase the overall outlook of location sceneries and maintain varied efficient natural resources. This caused travelers to spend more during their traveling by enhancing their knowledge of the traveled location (Goodall & Stabler, 1997). Reviewing information on former tourism, travelers would spend additional funds during the time of year when they enjoyed time off from their everyday duties. Travelers would prefer spending their leisure somewhere that was surrounded by tumultuous landscape, greenery scenery and the ability to thrive off nature's beauty.

Present Trends of Sustainable Tourism

According to the United Nations World Tourism Organization (UNWTO), the tourism industry has evolved enormously. Additionally, the revenues that are obtained exceed other prodigious establishments. Nowadays, tourism upsurges the positive effect of a normal atmosphere and guards the cultural veracity of our nation. But, in order for our nation to sustain tourism, more emphasis on provinces and homelands must be developed so that importance may be placed on preserving landscape and green friendly environments. This produces substantial impact on natural capitals, drinking patterns, contamination and societal structures in various regions. The need for ecological, accountable preparation and supervision is imperious for the business travel and tourism to totally persist.

Furthermore, electronic commerce has evolved based on newer technologies being introduced. Shum (2010) stated that online travel and tourism was over a \$20 billion industry in the year 2001 compared to \$2.5 billion in 1998. These current technological trends have reduced the workload on travel agencies as well as customer knowledge. Based on a survey from the Journal of Teaching in Travel and Tourism, 41.6% of travelers felt as though they did not receive quality customer service. This response was due to change in delivery of travel and tourism information. Additionally, it is projecting a negative effect of future tourism if mediums are not put into place to reach out to the tourism clientele so that sustainable measures may be infused.

Another aspect of sustainable tourism is economic and environmental awareness. Coral reefs are being trampled by tourists, beaches wrecked by hoteliers and the Arctic is being destroyed by cruises. In order to sustain tourism, increased cooperation and partnerships among the tourism industry, government, state, society, market, community, legislatures, managers, and most of all, the tourist must be established. A safer, cleaner future is worthy for our future travel generation. Building a demand business to business approach and fostering and increased knowledge of sustainable tourism practices are integral to the sustainability of its success. Expanding tourism encumbers four pillars of success: a) planning, b) environmental aspects, c) introductions of social economics and cultural characteristics, and d) maximizing the benefits that tourism can bring to the promotions and preservation of social economic cultures. The core elements that must be obtained are: raising awareness, education, standards, setting, training market access and accreditation.

Although some of these present trends are deemed daunting, new and invigorating ideas are predicted in order to increase the substantiality of the tourism industry. In order

to capitalize from the past and present trends, an analysis of the functionality of sustainable tourism must be utilized so that future sustainability would be beneficial to the success of the tourism industry. In order to forge forward and bring to a head the negative aspects within the tourism industry; it is extremely important to remedy these problems before infusing new travel destinations. This is an area that needs enhancement so that intensification in the sustainability of tourism is attained (Butler, 1998).

Future Trends of Sustainable Tourism

Procedures to increase the sustainability in tourism continue to be sought after and many people dispute that it cannot be accomplished based on the anomalies of goals and aspirations versus a measurable objective. Middleton and Hawkins (1998) stated that by 2050 half the Amazon rainforests will not exist and neither will 90% of the coral reefs, mainly as a consequence of climate change. Additionally, the number of travelers worldwide (i.e., including internationally) will quadruple by 2030 and the affects it will have on the world will not be optimistic. In order for the tourism industry to sustain the progressive productivity of travel, arduous work must be done by all industries (e.g., travelers).

In order to increase sustainability in tourism, the use of existing communication must be utilized. Learning the investors, transport services natural and cultural heritage areas, and most importantly, knowing who owns tourism businesses is extremely important. Establishing future regional plans for economic development, relevant local government issues and expressions of community aspiration is essential to the productivity of sustaining future tourism. Additionally, technology has increased the outflow of tourism and major attractions have seen enormous growth. The use of future technology aligned with industrialized prospect situations that explore problems like how to deal with environmental alteration, compression on water and other natural properties, and what the consumer may be considering in 15 years.

The tourism industry and other stakeholder's development of visionary strategies to attain sustainable outbound travel in the service sector are monumental at increasing the efficacy in travel and tourism. Another future sustainable prediction is overland travel which will bridge the gap between many countries by allowing low carbonated travel using the road, rail or ship. The travel industry will bud in the future and travel will emerge utilizing multiple means of travel. Glaesser (2008) stated that holidays in outer space will be the ultimate luxury experience, extreme Swedish ironing will be an olympic sport, embedded technologies will be the norm in future tourists and skiing in the Alps will be no more.

Prediction of Sustainable Tourism

I truly believe that in order to sustain the tourism industry, there are a host of factors that must be analyzed. The environment is extremely sensitive to the overexposed use of travelers that do not take the opportunity to preserve the natural habitat. Additionally, I predict that the future of travel has many great advantages as well as destructive ones. The first step at ensuring that everyone understands the need to preserve

our ecosystem is to host travel seminars and virtual lessons on travel. This will increase ones knowledge of what is needed to preserve the land for future use.

A positive factor of future tourism is the trend analysis of future economic upgrades. Technology is one main factor. It is almost like the movie, "The Net." In the future, you can travel without even leaving the comforts of your own home. This is a reality that will soon transpire based on the trend of travel now and how virtual reality is setting a forum for future improvement. A robotic clone can travel for you as you enjoy the leisure of the travel in your mind without actually moving. Additionally, having the ability to go anywhere in the world with a touch of a button. All of these trends are sure to transpire based on the technological development exploration on future travel and tourism. As the world continues to evolve, there will be many attributes to sustaining tourism and our society. Worrying about the coral reefs and the destruction of building over natural lands will begin to filter down and space houses and virtual improved wetlands will encompass the world and sustainable tourism will reach heights of the unknown.

Infusing Marketing Strategies into Sustainable Tourism

There are numerous types of travelers but those who truly believe in sustainability are defined as nature-based tourist. A study was implemented that compared behavioral responses based on travel destinations; individuals examined were found to be nature-based eco-tourism travelers. (Kretchman & Eagles 1990) It has been noted that travelers enjoy the natural singularities and generally engage in comparable interest as travelers believing and feeling the same way towards nature. Recent studies implied that in order to attract nature-based travelers, incorporating marketing strategies that appeal to their senses and character traits, will heighten their prospect of traveling. Aabo (2006), continued to analyze these trends and issues in order to provide a rationale for heightened services in the tourism industry based on a travelers preferred travel destination. He gathered information on past, present and future economical sustainability in tourism and compared it to what is needed to ensure that the industry understands the need for change in tourism before the market becomes unstable.

Conclusion

Sustainable tourism has emerged and it is continuing to evolve into a world of productive uses. Not only will the framework components increase; the need for products will transform how sustainability will be looked at. Local businesses are utilizing home-grown farmers for products; utilities that decrease degraded output solutions; and using merchandises that are environmentally friendly. As I continue to find ways to proliferate my knowledge on sustainable tourism; the aspect that surrounds the efficacy within the tourism industry will continue to emerge. My research will continue to provide the reader with basic knowledge of sustainable tourism and will evolve into eco-tourism and the emergence of the two. Sustainable tourism should be analyzed and additionally research must be accumulated in order to ensure that tourist understand the need to assist in supporting our ecosphere.

References

- Aabo, D. (2006). Sustainable tourism realities: A case for adventure service tourism. Retrieved from <http://library.csun.edu/docs/apannotbib.pdf>.
- Adams, M. (2006). The Future of Sustainability: Rethinking Environment and Development in the 21st Century. The World Conservation Union. Retrieved from http://cmsdata.iucn.org/downloads/iucn_future_of_sustainability.pdf
- Butler, R. W. (1991). Tourism, environment and sustainable development. *Environmental Conservation*, (18), 201–209.
- Butler, R. W. (1998). *Sustainable tourism – looking backwards in order to progress? A geographical perspective*. United Kingdom: London, Longman.
- Cornish, E. (2004). *Futuring: The exploration of the future*. Bethesda, MD: World Future Society.
- Gartner, W. C. (1996). *Native American gaming breakout session, travel and tourism* Research Association Annual Conference. Las Vegas, NV.
- Glaesser, D. (2008). *Tomorrow's tourist - scenarios & trends*. Retrieved on January 27, 2011, from <http://www.tomorrowstourist.com/>
- Goodall, B., & Stabler, M. J. (1997). *Principles influencing the determination of environmental standards for sustainable tourism*. Stabler, M.J.
- Harssel, J. (1986). Tourism an exploration. *The development of the tourism industry*. Rapid City, SD. Black Hills, Inc.
- Hawkins & Lamareux. (2001). *Eco-tourism*. Retrieved on January 28, 2011 from, <http://rudar.ruc.dk/bitstream/1800/3188/1/Final%20project,%20with%20white%20fronpa,%20for%20library.pdf>
- Kretchman, J. A., and P. F. Eagles (1990). "An Analysis of the Motives of Ecotourists in Comparison to the General Canadian Population." In Proceedings of the Third Symposium on Social Sciences in Resource Management. Rudder Conference Center, Texas A&M University, College Station, pp. 144-45.
- Middleton, V., & Hawkins, R., (1998). *Sustainable tourism: A marketing perspective*. Wellesley, MA.
- Murray, V., Draper, S., (2010). *Travel and tourism*. Retrieved on January 26, 2011 from <http://www.forumforthefuture.org/projects/travel-and-tourism>
- Shum, K. (2010). *Green travel-trends in ecotourism*. Retrieved on January 27, 2011, from <http://www.lohas-asia.org/2010/01/26/green-travel-trends-in-ecotourism/>

COMPARING STUDENT LEARNING STYLES IN TRADITIONAL, BLENDED, AND ONLINE LEARNING ENVIRONMENTS

Nicole L. Davis
Hospitality and Tourism Administration
Southern Illinois University, USA

Sylvia Smith
Hospitality and Tourism Administration
Southern Illinois University, USA

Stephanie Rhodes
Graduate School
Southern Illinois University, USA

ABSTRACT

As technology advancements continue, rapid growth of the Internet offers improved access for students involved in higher education. This not only means increased opportunities for distance learning, but opportunities in blended learning as well. There is little research that focuses on student achievement and learning outcomes in tourism-related curriculum while comparing online, blended and face-to-face learning environments. The purpose of this study is to evaluate tourism students' learning styles within the traditional, blended and online environments. Students enrolled in each of three tourism marketing courses (one taught in each learning environment) were surveyed. There were too few participants to garner solid results. However, students were less satisfied with the blended learning environment than the traditional and online environments.

KEYWORDS: Blended Learning, Effectiveness, Learning Styles, Online Learning, Student Satisfaction, Tourism Education

INTRODUCTION

As technology advancements continue, rapid growth of the Internet offers improved access for students involved in higher education. This not only means increased opportunities for distance learning, but opportunities in blended learning, as well. Blended learning allows students to benefit from the strengths of both the online learning environment as well as a traditional, face-to-face classroom. As post-secondary hospitality and tourism programs increase in popularity, a nontraditional curriculum design warrants research in order to effectively utilize web-based technology tools for instruction. Research is necessary to help educators refine hospitality and tourism courses for the purposes of offering students the maximum knowledge and benefits to be successful in the workforce.

Tourism educators are still in experimental stages of online and blended learning. As a result, there is little research that focuses on student achievement and learning outcomes while comparing online, blended and face-to-face learning environments. The purpose of this study is to evaluate students' learning styles within the traditional, blended and online settings. This research will serve to identify learning styles best suited for the online environment and to create effective instructional techniques and meaningful content in curriculum. As a result, the following research questions were posed:

1. What are the current learning styles of students enrolled in a Hospitality and Tourism Marketing course ?
2. Are there significant differences in student learning styles based on gender and ethnicity?
3. Are there significant differences in student satisfaction levels based on instructional methods (traditional, blended, and online) and student learning style?
4. How does student achievement in traditional courses compare to blended and online courses?

BACKGROUND

Technology represents challenges for educators for many reasons, but it also represents a large number of opportunities for education at all levels. One of the earliest recognized advantages was that “online learning, powered by broadband technology and the other new tools of the Information Age, is making it possible for more Americans every day to overcome barriers and to access the education they need” (Flores, 2010).

For hospitality and tourism education and other career and technical education programs, implications and opportunities of emerging technology are exciting and even unknown at times. “The field of hospitality and tourism education needs to take an active role in shaping the emerging standards in order that the new technology can truly benefit hospitality students including those with special needs” (Hofstetter, 2004, p. 112). Satisfaction, effectiveness and learning style must be examined prior to developing or adapting standards (Diaz & Entonado, 2009; Lim & Morris, 2009; Saeed et al., 2009; Zwaal & Otting, 2007).

This paper has been organized into three areas to better address the research questions: 1) student satisfaction, 2) effectiveness of E-learning, and 3) learning styles in Career and Technical Education programs in Higher Education. Examining these areas will offer a better look at issues, trends and research in the area of hospitality and tourism education and the three learning environments previously mentioned.

Student Satisfaction

According to the Sloan Consortium (2002), faculty and student satisfaction are key to developing effective online and blended curriculum. Student satisfaction is important no matter the learning environment and can lead to greater retention and recruitment opportunities in higher education. This can also mean greater motivation to graduate (Bailey and Morais, 2004). Although Bailey and Morais' research did not

indicate greater satisfaction of one learning environment over another, the study does indicate how interaction may improve satisfaction in coursework.

Little research has been done in the area of student satisfaction comparing the three (online, blended and face-to-face) different learning environments. Yet, “distance learning has received mixed results from researchers studying students’ satisfaction with it” (Helms & Jackson, 2008, p. 8). In an online learning environment motivation and achievement were positively related (Bekele, 2010). Although student ratings of blended courses are favorable, the challenge of being self-motivated, as well as the reduction of actual time in class, does pose a challenge for some students (Napier, Dekhave, & Smith, 2011).

Banerjee (2011) found that students believed blended courses had somewhat unrealistic expectations and were more work than traditional courses because teachers expected “students would read voluminous amounts of materials, post responses to discussion boards regularly, participate in class, and do research independently and online” (pp. 14). A slight majority (57%) of students indicated they liked blended formats, but the face-to-face component remained a strong component in the course evaluation.

Students aren’t the only participants whose satisfaction levels matter. Faculty must also be satisfied with the learning environment and what it offers. Bolliger & Wasilik (2009) determined “the student factor is the most important factor influencing satisfaction of online faculty, which is encouraging because it leads us to believe that many online instructors are student centered (p. 112).”

Effectiveness of E-learning

E-learning, in fully online or blended form, is still in its infancy, certainly within hospitality and tourism. Sigala and Christou (2002) indicated educators often did not fully exploit the potential resources available, while others merely transferred information from the face-to-face setting, making only marginal improvements from the traditional classroom design. Such actions impact the effectiveness of the e-learning environment.

After comparing face-to-face and online learning environments (for the same course taught both ways), Neuhauser (2002) determined there to be no “significant differences” between the two groups in grades or outcomes and learning preferences. This may suggest that there are not many differences in the level of knowledges gained between the environments and that online instruction can be just as effective as face-to-face instruction when designed appropriately.

Research from Ginns and Ellis (2007) showed close, reliable associations between four factors: teaching, (available) resources, (student/teacher) interactions and (student)?workload. This indicates several areas to consider when designing courses and evaluating effectiveness and outcomes. The results of the same study indicate positive student perceptions of teaching quality and level of interactions to be strongly related to comparatively higher grades.

However, studies conducted by the National Bureau of Economic Research and U. S. Department of Education find statistically significant differences in student performance in online courses compared to face-to-face courses (Carter, 2010). Carter

suggests further examination comparing online and traditional learning environments and how the different settings affect different groups of students.

In research addressing comparability and consistency of the three learning environments, “faculty responses to the idea that online, blended, and face-to-face courses need to be designed to deliver comparable learning experiences ranged from agreement to dismay” (Fabry, 2009, p. 258). This experiment tested a “Matrix for Creating Comparability”. Research indicated that administrative support is a required and integral part of design and development of any and all curriculum and instruction to shift from teacher-centered to learner-centered pedagogy.

Learning Styles

In addition to the many factors influencing student and teacher satisfaction and assessment of courses in the three learning environments, recognition of learning styles is also vital because “individual learning differences are an important area to consider in making instructional decisions for learner-oriented blended instruction” (Lim & Morris, 2009, p. 291). Creating applicable learning experiences from design to delivery to evaluation provides a better experience for both student and teacher.

These same considerations are just as relevant in the online setting, potentially moreso. In a Boston Globe interview of educators from Lesley University in Cambridge and University of Massachusetts Dartmouth, educators advise “online readiness” should be assessed by individual students. University of Massachusetts educator Jeanette E. Riley indicated without the traditional classroom setting, “more self-discipline” is needed by online students, while Lesley University’s Karen Muncaster indicated that students should consider their own learning style before enrolling in an online course (Denison, 2010).

Research by Saeed, Yang and Suku (2009) shows relationships that students prefer to use a combination of synchronous and asynchronous communication in class. Results further suggested that students today are not only ready to experience new technology in the classroom and their studies, they are also willing to collaborate and use multiple communication channels (Saeed et al., 2009). While this is a favorable report for blended learning, there is only a limited amount of research conducted in the subject area.

Zwaal & Otting (2007) state that “the recent trend in higher vocational education can be identified as a shift toward a more constructivist concept of education.” (p. 256) In the simplest form of constructivism, the instructor facilitates learning rather than imparting knowledge or lecturing. Research from Diaz and Entonado (2009), comparing face-to-face and online learning recognize that traditional teaching methods neglect the need to guide students through conceptual learning and development of the subject-matter. Perhaps in recognition of this, “e-learning platforms are increasingly adapting a pedagogical approach that is based on the theoretical underpinnings of constructivism (critical thinking skills) and collaboratism” (Sigala, 2003, p. 120).

In hospitality and tourism education, limited research exists examining the differences in student learning styles among learning environments. However, hospitality and tourism programs and others of a vocational nature lend themselves to practical application, allowing students to gain real-world experience (Dale & McCarthy, 2006). Supporting that idea, Sigala (2002) indicates “when considering the diverse profile and

needs of learners entering tourism and hospitality education (e.g. high school leavers, people with industry experience, industry professionals), the identification of factors affecting individual learning processes is crucially important.” (p. 41) In the direction of e-learning, Sigala (2002) concludes the “design of student-centered (collaborative and constructivism) and student-determined (personalized)” are steps to include in design of the learning environment (p. 42).

METHOD

A student assessment instrument based on the Index of Learning Styles (ILS) (Felder and Soloman, 1991) was developed to collect information concerning learning styles, student satisfaction, and student achievement in the Hospitality Marketing Management Course at SIUC. The ILS instrument was designed to assess preferences on four learning style dimensions (active/reflective, sensing/intuitive, visual/verbal, and sequential/global). Three questions were designed to ascertain student satisfaction to include” instructional method, overall value of learning from course, and overall satisfaction with course. In addition, demographic questions were included as well as expected grade from course. The assessment was distributed in each of three semesters; Fall 2010 in a traditional classroom setting, Spring 2011 in a blended class setting, and Summer 2011 in an online setting. The same instructor taught the course all semesters, and has 6 years of experience teaching in higher education in traditional and online learning environments. Human subjects was approved for the study, therefore students were not forced to participate and had the option to decline the study at any time. For those completing the study, extra credit was given as an incentive to participate.

The assessment instrument was pilot tested in a Food and Beverage Cost Control course at the beginning of the Fall 2010 semester. Reliability of dimensions within the ILS instrument were similar as those found in previous studies (Livesay, et al., 2002; Litzinger, Lee, Wise, and Felder, 2007; Zywno, 2003) where the Sensing/Intuitive scale had the highest reliability alpha (0.674), followed by Visual/Verbal (0.661), Active/Reflective (0.615), and Sequential/Global (0.462) Although Sequential/Global had a relatively low reliability score, it was still higher than 0.40 as recommended by Stevens (1992).

RESULTS

Thirty-four questionnaires were collected over the one-year study period. Two of the questionnaires were unusable for a total sample of thirty-two questionnaires.

Table 1 presents the demographic characteristics of the student respondents. The majority of the students were between the ages of 20-22 (79%), while a few were between the ages of 23 and 29. There were more females (69%) than males and a greater percentage of the students (80%) were Caucasian. In terms of expected grades, all students anticipated a B or higher for the course.

Table 1. STUDENT DEMOGRAPHIC CHARACTERISTICS

	Frequency	%
AGE (n=32)		
20	7	22%
21	12	38%
22	6	19%
23+	7	21%
GENDER (n=32)		
Male	10	31%
Female	22	69%
ETHNICITY (n=31)		
Caucasian	25	80%
African American	2	7%
Asian/Pacific Islander	1	3%
Hispanic	2	7%
Other	1	3%
GRADE (n=32)		
A	15	47%
B	17	53%

All students majored in Hospitality and Tourism Administration and were enrolled in HTA Marketing 435

The first research question addressed learning styles of the student respondents. The ILS instrument was utilized to examine four dimensions of student learning: active/reflective, sensing/intuitive, visual/verbal, and sequential/global. The original instrument from Felder and Solomon (1991) contained 44 items, however preliminary results from our pilot test indicated eliminating 4 of the items for a total of 40 learning styled questions.

Initially, in order to answer research question 1 analyzing HTA student learning styles, a factor analysis was intended to reduce a series of interrelated variables into a smaller set of "learning style" factors. This analysis was not possible with only 32 respondents and a 40-item instrument. As a rule of thumb, it is recommended to have a minimum of 10 respondents per variable, thus indicating a minimum of 400 respondents (Field, 2005). Reliability and a correlation matrix were assessed on the items within the factors from the original learning style research. Based on these results only two factors with satisfactory Cronbach's alpha were reportable: Visual/Verbal ($\alpha = 0.571$) and Sensing/Intuitive ($\alpha = 0.861$).

Seven items made up the Visual/Verbal learning style factor. The following statements were on the questionnaire: "When I think about what I did yesterday, I am most likely to get 'a picture or words,'" "When I am learning something new, it helps me to 'talk about it or think about it,'" "I prefer to get new information in 'pictures, diagrams, graphs, or maps or written directions or verbal theories,'" "In a book with lots of pictures and charts, I am likely to 'look over the pictures and charts carefully or focus on the

written text,' "I remember best 'what I see or what I hear,' "when I see a diagram or sketch in class, I am most likely to remember 'the picture or what the instructor said about it,' and "I tend to picture places I have been 'easily and fairly accurately or with difficulty and without much detail.'

Four items made up the Sensing/Intuitive factor, these were: "If I were a teacher, I would rather teach a course 'that deals with facts and real life situations or that deals with ideas and theories,' "I find it easier 'to learn facts or to learn concepts,' "I prefer the idea of 'certainty or theory,' and "I prefer courses that emphasize 'concrete materials (facts, data) or abstract material (concepts, theories).'

Research question two asked whether or not there were differences in learning styles based on gender and ethnicity. There were no significant differences in gender or ethnicity when comparing these two learning style factors.

To answer research question 3, a One-way Analysis of Variance (ANOVA) was used to compare satisfaction among students under the three different instructional methods. Table 2 displays the results. There were no differences between the three groups in terms of Overall Value of learning and Overall Satisfaction with the course, yet there were differences regarding satisfaction with the Instructional Methods. LSD Post hoc test indicated respondents of the Blended teaching environment had lower mean scores than the other two methods.

Table 2. ANOVA COMPARING INSTRUCTIONAL METHODS WITH STUDENT SATISFACTION

	Sum of Squares	df	Mean Square	F	Sig.
INSTRUCTIONAL METHODS	5.586	2	2.793	2.968	0.057
VALUE	0.642	2	0.321	0.364	0.698
OVERALL	2.48	2	1.24	1.755	0.191

Mean comparisons were made Between Groups

Lastly, to answer research question 4, comparing student achievement between the three different teaching methods an ANOVA was performed. Results indicated no significant differences between expected grades and instructional methods.

CONCLUSION

When comparing the three instructional methods, there were no significant differences in value of learning and overall satisfaction. However, the blended environment was less satisfactory to students compared to traditional and online methods. Increasing student awareness of expectations in a blended course at the onset is important, especially for students who are enrolling in a blended course for the first time.

There was no significant difference in grade expectations; students' anticipated grades were the same across all environments. Unfortunately, the results did not present a definite learning style suitable for any specific learning environment. From the total sample, the learning styles that surfaced among hospitality and tourism students were Visual/Verbal and Sensing/Intuitive.

Although these results cannot be generalized, the apparent learning styles imply that blended and online courses should include both active and visual design components. Instructors of blended and online courses should take care to keep students engaged through discussion forums and more visually based technology tools. These results speak to the importance of community in nontraditional learning environments.

REFERENCES

- Bailey, K. D., & Morais, D. B. (2004). Exploring the Use of Blended Learning in Tourism Education. *Journal of Teaching in Travel & Tourism*, 4(4), 23-36. doi:10.1300/J172v04n04_02
- Banerjee, G. (2011). Blended environments: Learning effectiveness and student satisfaction at a small college in transition. *Journal of Asynchronous Learning Networks*, 15(1), 8-19.
- Bekele, T. A. (2010). Motivation and Satisfaction in Internet-Supported Learning Environments: A Review. *Educational Technology & Society*, 13(2), 116-127. Retrieved from http://www.ifets.info/journals/13_2/ets_13_2.pdf
- Bolliger, D. U., & Wasilik, O. (2009). Factors influencing faculty satisfaction with online teaching and learning in higher education. *Distance Education*, 30(1), 103-116. doi:10.1080/01587910902845949
- Carter, D. (2010, September 13). *Study: Online learning less effective for some*. Retrieved from <http://www.ecampusnews.com>: <http://www.ecampusnews.com/top-news/study-online-learning-less-effective-for-some/>
- Dale, C., & McCarthy, P. (2006). I Like Your Style: The Learning Approaches of Leisure, Tourism and Hospitality Students Studying Generic Modules. *Journal of Hospitality, Leisure, Sport and Tourism Education*. 5(2), 48-58. Retrieved from <http://www.heacademy.ac.uk/assets/hlst/documents/johlste/vol5no2/0116.pdf>
- Denison, D. C. (2010, October 10). Online success depends on learning style. *Boston Globe* (pp. G.2), Business section. Boston, MA. Retrieved from www.boston.com
- Diaz, L. A., & Entando, F. B. (2009). Are the Functions of Teachers in e-Learning and Face-to-Face Learning Environments Really Different?. *Educational Technology & Society*, 12(4), 331-343. Retrieved from http://www.ifets.info/journals/12_4/ets_12_4.pdf
- Fabry, D. (2009). Designing Online and On-Ground Courses to Ensure Comparability and Consistency in Meeting Learning Outcomes. *The Quarterly Review of Distance Education*, 10(3), 253-261.
- Felder, R. M., & Spurlin, J. E. (2005). Applications, reliability, and validity of the *Index of Learning Styles*. *International Journal of Engineering Education*, 21(1), 103-112.
- Field, A. (2005). *Discovering statistics using SPSS(2nd Edition)*. London: Sage.
- Flores, J. G. (2010). *Enabled by Broadband, Education Enters a New Frontier*. United State Distance Learning Association. Retrieved from http://www.usdla.org/assets/pdf_files/OnlineWhitePaper-V10312.pdf

- Ginns, P., & Ellis, P. (2007). Quality in blended learning: Exploring the relationship between on-line and face-to-face teaching and learning. *Internet and Higher Education, 10*, 53-64. doi:10.1016/j.iheduc.2006.10.003
- Helms, M. M., & Jackson, M. J. (2008). Student Perceptions of Hybrid Courses: Measuring and Interpreting Quality. *Journal of Education for Business, 83*(1), 7-12.
- Hofstetter, F. T. (2004). The Future's Future: Implications for Emerging Technology for Hospitality and Tourism Education Program Planning. *Journal of Teaching in Travel & Tourism, 4* (1), 99-113. doi:10.1300/J172v04n01_07
- Index of Learning Styles. Retrieved 8-2-2010 from <http://www4.ncsu.edu/unity/lockers/users/f/felder/public/ILSpage.html>
- Lim, D. H., & Morris, M. L. (2009). Learner and Instructional Factors Influencing Learning Outcomes within a Blended Learning Environment. *Educational Technology & Society, 12*(4), 282-293.
- Napier, N. P., Dekhave, S., & Smith, S. (2011). Transitioning to blended learning: Understanding student and faculty perceptions. *Journal of Asynchronous Learning Networks, 15*(1), 20-32.
- Neuhauser, C. (2002). Learning Style and Effectiveness of Online and Face-to-Face Instruction. *Americal Journal of Distance Education, 16*(2), 99-113. doi:10.1207/S15389286AJDE1602_4
- Saeed, N., Yang, Y., & Suku, S. (2009). Emerging Web Technologies in Higher Education: A Case of Incorporating Blogs, Podcasts and Social Bookmarks in a Web Programming Course based on Students' Learning Styles and Technology Preferences. *Educational Technology & Society, 12*(4), 98-109. doi:10.1.1.170.1615
- Sigala, M. (2003). Developing and implementing eAssessment Strategies in Virtual Learning Environments. *16th Bled eCommerce Conference: eTransformation*, (pp. 119-129). Bled, Slovenia. Retrieved from [http://ecenter.fov.uni-mb.si/proceedings.nsf/0/c9d96fa7e412a634c1256ea1002c1760/\\$FILE/10Sigala.pdf](http://ecenter.fov.uni-mb.si/proceedings.nsf/0/c9d96fa7e412a634c1256ea1002c1760/$FILE/10Sigala.pdf)
- Sigala, M. (2002). The Evolution of Internet Pedagogy: Benefits for Tourism and Hospitality Education. *Journal of Hospitality, Leisure, Sport & Tourism Education, 1*(2), 29-45. doi:10.3794/johlste.12.4
- Sigala, M., & Christou, E. (2002). Using the Internet for complementing and enhancing the teaching of tourism and hospitality education: evidence from Europe. In A. F. K.W. Wober (Ed.), *Information and Communication Technologies in Tourism 2002*. Springer-Verlag, Wien.
- Sloan Consortium. (2002). *Quick guide: Pillar Reference manual*. Sloan-C. Retrieved from http://sloanconsortium.org/publications/books/dprm_sm.pdf
- Stevens, J.P. (1992). *Applied multivariate statistics for the social sciences* (2nd edition). Hillsdale, NJ: Erlbaum.
- Zwaal, W., & Otting, H. (2007). Hospitality management students' conceptions of education. *Tourism and Hospitality Research, 7*(3/4), 256-268. doi:10.1057/palgrave.thr.6050048

THE TASTE OF COURAGE, THE SOUNDS OF LEARNING: EXPERIENTIAL LEARNING IN TOURISM EDUCATION PRACTICE

Vahagn Asatryan
Department of Business
Redeemer University College, Canada

ABSTRACT

Outdoor-adventure programs are often cited as designed to enhance the participants' general skills (e.g., personal development, interpersonal communication, and creative problem solving) (Meyer, 2003). This paper introduces contributions of an experiential learning course to the professional development of students enrolled in a hospitality management program. The adventure management program emphasized active learning by putting business concepts into action at a resort, based on Kolb's (1984) four-stage cycle of learning. Daily journal writing exercises stimulated students' critical reflection and opportunities for instructional feedback. An open coding procedure based on the grounded theory (Strauss & Corbin, 1998) was used to generate categories that reflected the students' experiences. The analyzed journal data helped identify three categories of reflections: emotional, cognitive, and personal/spiritual. Instructional recommendations include designing more context-specific exercises for student engagement at the resort and incorporating site-specific practical examples into the pre-experience lecture series to enhance student learning. The author encourages tourism educators to expand their vision of experiential learning and shares insight on the process of organizing and orchestrating meaningful student-oriented educational experiences. University administrators will gain insight into institutional benefits (e.g., retention) and challenges of such programs.

KEYWORDS: Experiential learning; Resort management, Student journal.

INTRODUCTION

The growth of hospitality and tourism programs in recent years has generated increasing interest in enhancing student learning experiences with the emphasis on experiential learning and service learning (Seaman & Gas, 2004). Students' learning experiences outside the classroom constitute a valuable component of their college education (Tinto, 1997) and are related to personal development (Kuh, 1995). Our challenge as tourism management educators is to facilitate an environment in which learners can deal with every-day practical situations and strengthen their professional competencies by observing industry professionals in proper practical contexts.

ADVANTAGES OF EXPERIENTIAL LEARNING

Student's learning experiences outside classroom such as experiential learning as well as interactions with faculty and peers in such environments have been shown to have a positive influence on learners (Terenzini, Pascarella, & Bliming, 1996). The experiential learning environment provides students with numerous opportunities to obtain and sharpen transferable skills, such as critical thinking in realistic situations, teamwork, problem-solving, risk-taking, etc. In these learning environments students may also learn to evaluate important hospitality operations areas, to analyze the quality of a resort site or area, to assess the professionalism of the staff and management, as well as critique management practices and operations policies among other variables. Students also gain insight into how to ask probing, critical questions, how to interpret answers in relation to their pre-existing theoretical knowledge, and how to solve problems given a set of resources and instructions. All of this is done in a dynamic hands-on environment, which is often not available in an educational institution or even a lab (Schlager, Lengfelder, & Groves, 1999). This kind of direct engagement of the professional environment stimulates innovative thinking, emotional maturity, and even revisions in a student's worldview. Moreover, learning business practices while observing professionals at work and simultaneously participating in the service delivery process provides students with unique and invaluable insights into customer service practices and consumer behavior analysis. The implementation of experiential learning programs, however, has been criticized for its lack of balance between activities and learner's reflections on those activities (Breuning, 2005).

COURSE PHILOSOPHY AND APPROACH

Learning, according to the experiential learning theory, is defined as "the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience" (Kolb, 1984, p. 41). Kolb's four-stage cycle of learning (Figure 1), suggests that *immediate or concrete experiences* generate a basis for learner's *observations and reflections*, which are assimilated and distilled into *abstract concepts*. These concepts produce new implications for action, which, in turn, can be *actively tested* for creating new experiences. Similarly, Van Brummelen (1988) identifies the roles of the teacher and the learner in this four-phase process: setting the stage, disclosure, reformulation, and transcendence. Schlager, et al., (1999) suggest that "the more open [instructional] methodologies provide freedom for student expression, input, and response." The course design philosophy and approach were based on these theoretical underpinnings.

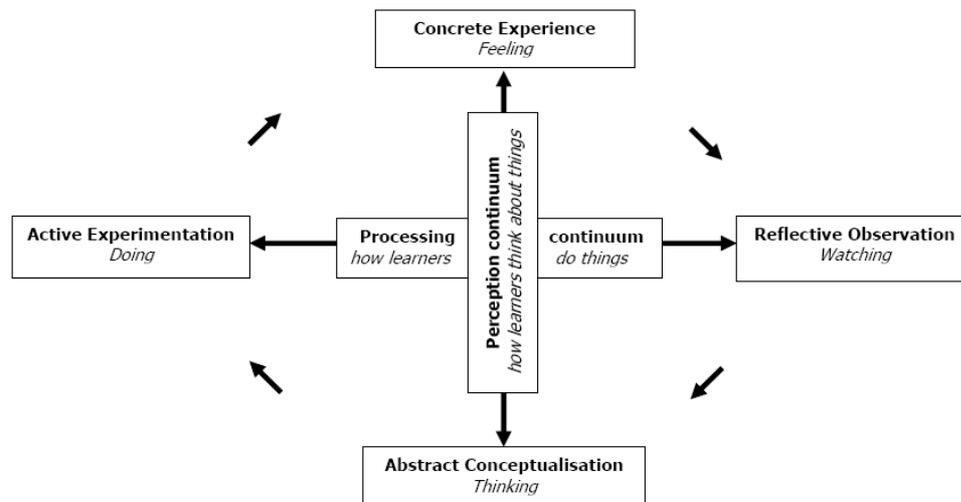


Figure 1. Kolb's (1984) Experiential Learning Model.

Using Kolb's (1984) model as a guiding framework (in collaboration with the resort's management team) this course was designed to run in two distinct phases. The first phase was designed as a one-week resort management (full college-credit) course to take place on the campus of a relatively small-size university. The class participants met every day for lectures, exercises, discussions on the current issues in mountain resort management and preparations for the second phase.

This second phase included five days at the resort for hands-on learning and exercises. The goal of this component was not to enable students master significant skills in such activities as canoeing or white-water rafting, but to primarily help them gain operational insight in collaboration with the resort management and staff. This unique approach also stressed the importance of student's experiences as "guests of the resort," with all the privileges and responsibilities. Ideally, students would experience the resort services as regular customers while learning from the staff about the operational and other challenges related to the activities. For example, while engaging in rock-climbing activities, student learned about staffing, training, programming, logistics, as well as legal and insurance related issues.

PROGRAM DEVELOPMENT STRATEGIES AND FORMULATION OF LEARNING OUTCOMES

This course was designed as an elective offering tailored to the needs of the students (particularly in their second or third year of studies) in a Hospitality Management Program (HMP) at a relatively small, private university in New England, USA. The course was available to all other students in the University as an "open elective." The program coordinator identified the learning outcomes of this course and how they fit with the HMP's goals and student development. The author discussed these goals with the senior management of the resort hosting the program and made necessary changes. Unlike many outdoor education programs, this course was designed to enhance the students' operations

management, marketing, guest relationship, and similar resort management skills. The course syllabus contained a detailed description of these outcomes. Thus, upon completion of the program students would be able to:

- Identify major resort market segments and describe customer profiles
- Describe social, economic, and cultural impact of resort developments and community implications
- Categorize key recreational activities and facilities at mountain-based resorts
- Describe the role of resort staff and their impact on guest experience
- Identify key components of resorts' organizational structure, personnel management, administration, guest relations, and security, as well as environmental and public policy issues
- Describe the resort planning and development process and identify the basic structural elements of a resort.

INDUSTRY PARTNERSHIP DEVELOPMENT PROCESS

The design of this program relied partially on the capabilities and resources at the host resort. This mountain resort facility provided a variety of experiences such as flat and swift water activities, ropes course, rock climbing, etc. The course instructor secured the buy-in of the resort management team on the program's approach and, with their expertise on guest programming, devised the week-long program to take place in the month of August. The resort staff members were instructed in assisting the students attain their educational goals. Under this approach, the course instructor became a part of the student group (with separate accommodations and arrangements near those of the students) and participated in all activities with them, often facilitating and encouraging appropriate learning strategies.

ASSESSMENT: STUDENT JOURNAL GUIDELINES AND REFLECTIONS

Reflection has been recognised as an important element of learning (Schon, 1987). The author follows the definition of *reflection* as an important human activity in which people recapture their experience, think about it, mull it over and evaluate it (Boud, Keogh, & Walker, 1985). The learner's experience enhances reflection on the subject matter such as theoretical concepts or management principles, or may expand one's worldview by putting to test those theoretical concepts in practice (Reid, 1993).

The purpose of including journaling activities was to enhance participants' learning and to strengthen the relation between the real-world experiences and the follow-up reflective activities. These reflections allow educators "to engage students in a critique of their beliefs and practices" (Bean & Stevens, 2002, p. 206). They provide opportunities to explore, identify, and reconcile differences between theoretical knowledge, pre-existing assumptions, and actual outcomes (Johns, 1995) as well as to generate opportunities for creating personal meaning (Brockbank & McGill, 1998) and recognize one's role in a group. In Kolb's (1984) model learners' reflections allow them to review the experience and determine its significance in order to reconcile and integrate new knowledge with existing schemas and worldview assumptions.

Following Boud *et al.*, (1985), the author allocated specific time for learner reflections and recommended students to find adequate places for this process. Furthermore, the written instructions to the students encouraged communal discussion and group reflections on the day's events. (These group activities were not mandatory, and in any case students had to submit individual journals. Students were asked to write 2-3 pages). Students also received daily feedback on their writing before they engaged in further reflections on the next stage of their educational adventure. (In addition, students had to produce individual projects, such as a marketing plan for the resort or a guest activity program based on their experiences and journal reflections). The questions Ishii, Gilbride, and Stensrud (2009) used in their analysis of journal reflections were modified to include the following statements: What did the students experience during the adventure program? How did it contribute to their academic, professional, and personal growth? What reactions did they have?

METHODS & RESULTS

The small group of students generated close to 30 journals for each of the two years of the program. An open coding procedure based on grounded theory (Strauss & Corbin, 1998) was used to generate categories that reflect the learners' experiences. Grounded theory approach was chosen because of its flexibility and creativity, whereby systematic comparisons yield more discrete categories. The writer's anonymity was ensured with an identification number assigned to each journal. Following recommendations in Findlay, Dempsey, & Warren-Forward (2010) and Ishii *et al.*, (2009), the author read the journal once (for grading purposes) and re-read the journals after a period of time (to reduce the initial bias in interpretation) for coding purposes for this study. Using Findlay's coding development process the author formed categories, examined commonalities, and tested validity. The author read the journals, making notes and highlighting substantive and reflective sections. A second reading identified various categories and grouped them accordingly, using word-processing software. A student researcher also read the journals and independently identified categories which were then compared with those of the author.

The data revealed three general categories of reflections: emotional (e.g., fear, trust, surprise), cognitive (e.g., course content, professional observation or judgment related descriptions), and personal/spiritual (e.g., personal maturation, spiritual experiences).

Emotional reflections

Emotional responses were among the most telling and rewarding reflections read by the researcher. Students described their feelings and reactions toward the day's events, ranging from fear to joy, in a variety of descriptive statements (e.g., invigorating, exciting, scary). These sections of the journals also indicated internal struggles and emotional victories the students achieved after going through an experience. For example, students reflected on the positive and negative emotions they experienced before the actual experience: "I started to get very nervous", during the event: "I felt so good about myself

for actually going through (the white-water rafting experience)”, and after the exercise: “I learned that you need to be spontaneous every once in a while.”

Overall I am happy with myself. I was proud of myself.
I learned that being brave and trying new things is rewarding.
I intend to have a more positive attitude in everything.

Cognitive reflections

The *cognitive* category included statements that reflected knowledge attainment, identification and description of course concepts, as well as analysis and evaluation of the events and experiences. Students reflected how their understanding of the course concepts changed because of their practical experiences and interactions with the resort staff. The interactions with the resort guides, who facilitated the activities, allowed students to gain insight into the role and influence of the service provider’s characteristics and personal qualities on guest experiences, which we discussed in our lectures. As one student wrote, “Developing a relationship with your guide is something that should happen.”

Some critical reflections on specific events attracted students’ own assessments of those reflections. For example, a female student described her reactions to experiences in a paired, trust-building exercise, which “caused me to think about how people should not panic or get stressed because being able to think in tricky situations is important. I had to stop and think it through a couple of times.”

Other student reflections included thoughts on resort management and marketing, as well as sustainable operations and stewardship:

I learned about various aspects of resort management, how to build a resort as part of the natural environment, and the effects of the environment and weather (e.g., lack of snow or persistent rain) on operations.

I learned a lot about the business aspects of the resort and taking care of nature.

Knowledge of the different paddle strokes was also an enjoyable experience that I will never forget.

I learned that in order to be complete _____ exercise you have to possess patience.

Personal or spiritual reflections

This category of reflections emerged as a persistent topic in the journals of all students and included statements related to students’ well-being, personal growth, as well as spiritual or philosophical maturation:

My persistence paid off.

I enjoy helping other people reach their goals.

The mountains and water made me feel so peaceful and small.

From this experience I learned to be happy with a decision I make and not to second guess myself.

The most valuable lessons I’ve learned are about myself and other people: that I can be myself even around people who are different. I can get along and be friends with people who don’t have the same values - I just have to avoid imitating them.

I wonder if (some of my classmates) wished they had done things differently.

This experience taught me to deal with life as it comes and never give up.

I felt myself growing stronger and more adventurous.

Trusting others in the group and equipment had been easy for me, but when it was me versus the water rapids, I had difficulty trusting myself.
Part of me will miss these people [other students].

EVIDENCE OF THE PROGRAM'S SUCCESS

Students' journal entries and verbal feedback indicated satisfaction and significant progress in understanding and application of the course concepts. The team-building exercises appeared to have improved the students' leadership and team-building skills, while participation in various activities enhanced students' understanding of programming, staffing, and marketing challenges.

Furthermore, daily journal grading and feedback allowed for further deepening of the relationship between the instructor and the students. Students' writing on character-building episodes and student-professor relationships, as well as connections to previous personal experiences warranted deep reflections on self-identity, personal meaning, and future personal and professional orientation. The appropriate physical contact between the students and the instructor during the activities (e.g., a "helping hand" in team-building exercises or rock climbing) further enhanced trust and interdependence, as well as students' confidence and morale. The student journals indicated that the entire program was an unforgettable and enjoyable experience for all participants.

Overall, the trip was a life-changing experience. I didn't know so much could be learned in one week. I learned how to interact with others and trust my classmates.
I tried new things that I would not have done on my own.
I would definitely tell my (college) friends to take this course next time.
I learned more than I thought I would.
It was definitely the best class the University had to offer.

DISCUSSION AND RECOMMENDATIONS

The results of the two-week experiential resort management course indicated that the students found the learning space (i.e., both physical places and what Kolb and Kolb (2005, p. 200) call "constructs of the person's experience in the social environment") challenging, yet the post-experience debriefs with the management and the author were educational and inspiring. Community building exercises and critical experience discussions provided foundation for further professional development and character formation during the course. Students noted positive changes in their critical thinking skills, teamwork, problem-solving, and risk-taking capabilities. The daily inputs from the resort management and staff as well as discussions with the course instructor appeared to have enhanced the student learning experience in this course. The program may further benefit from more context-specific exercises for student engagement at the resort (e.g., applications of Programmer's Cube (Farrell & Lundegren, 1991) in action) and incorporating site-specific practical examples into the pre-experience lecture series to enhance student learning.

This study also provides insight into the effectiveness and value of such experiential learning methods in travel and tourism education programs. The student journals indicated increased levels in positive attitude and commitment toward the program and the University. (Only one student left the study program before graduation due to personal reasons). Travel and tourism educators are encouraged to use similar experiential learning programs to help students learn management, marketing, operations, and other aspects of the industry's businesses. Further research may explore the effects of such programs on the course instructors (e.g., their own personal or spiritual growth).

REFERENCES:

- Bean, T., & Stevens, L. (2002). Scaffolding reflection for preservice and inservice teachers, *Reflective Practice, 3*(2), 205–218.
- Boud, D., Keogh, R., & Walker, D. (1985). *Reflection turning experience into learning*. London: Kogan Page.
- Breuning, M. (2005). Turning experiential education and critical pedagogy theory into praxis. *Journal of Experiential Education, 28*(8), 106-122.
- Brockbank, A., & McGill, I. (1998). *Facilitating reflective learning in higher education*. Philadelphia, PA: Society for Research into Higher Education & Open University Press.
- Farrell, P., & Lundegren, H. M. (1991). *The process of recreation programming: Theory and technique* (3rd ed.). State College, PA: Venture Publishing.
- Findlay, N., Dempsey, S, & Warren-Forward, H. (2010). Developing a qualitative framework for analysis of student journals. *The Radiographer, 57*(2), 34-39.
- Ishii, H., Gilbride, D., & Stensrud, R. (2009). Students' internal reactions to a one-week cultural immersion trip: A qualitative analysis of student journals. *Journal of Multicultural Counseling and Development, 37*, 15-27.
- Johns, C. (1995). Framing learning through reflection within Carper's fundamental ways of knowing in nursing. *Journal of Advanced Nursing, 22*, 226–234.
- Kolb, D. A. (1984). *Experiential learning*. Englewood Cliffs, NJ: Prentice Hall.
- Kolb, A. Y., & Kolb, D. A. (2005). Learning styles and learning spaces: Enhancing experiential learning in higher education. *Academy of Management Learning & Education, 4*(2), 193-212.
- Kuh, G. D. (1995). The other curriculum: Out-of-class experiences associated with student learning and personal development. *Journal of Higher Education, 66*(2), 123-155.
- Meyer, J. (2003). Four territories of experience: A developmental action inquiry approach to outdoor-adventure experiential learning. *Academy of Management Learning and Education, 2*(4), 352–363.
- Reid, B. (1993). “But we're doing it already”: Exploring a response to the concept of reflective practice in order to improve its facilitation. *Nurse Education Today, 13*(4), 305-309.
- Schlager, F., Lengfelder, J., & Groves, D. (1999). An exploration of experiential education as an instructional methodology for travel and tourism. *Education, 119*(3), 480-488.
- Schon, D. (1987). *Educating the reflective practitioner*. San Francisco: Jossey-Bass.
- Seaman, J., & Gass, M. (2004). Service-learning and outdoor education: promising reform movement or future relics? *Journal of Experiential Education, 27*(1), 67-86.

- Strauss, A. L., & Corbin, J. (1998). *Basics of qualitative research: Grounded theory procedures and techniques* (2nd ed.). Thousand Oaks, CA: Sage.
- Terenzini, P.T., Pascarella, E., & Blimling, G.S. (1996). Students' out-of-class experiences and their influence on learning and cognitive development. *Journal of College Student Development, 37*(2), 149-162.
- Tinto, V. (1997). Classrooms as communities: Exploring the educational character of student persistence. *Journal of Higher Education, 68*(6), 599-623.
- Van Brummelen, H. (1988). *Walking with God in classroom: Christian approaches to learning and teaching*. Welch Publishing: Burlington, ON: Canada.

STRATEGIC PARTNERSHIP TO IMPROVE TOURISM EDUCATION:
UNIVERSITY OF FLORIDA, USA AND THE STATE UNIVERSITY OF NIZHNI
NOVGOROD, RUSSIAN FEDERATION

Svetlana Stepchenkova
Charles W. Lane
Lori Pennington-Gray
and
Brijesh Thapa

Department of Tourism, Recreation and Sport Management
University of Florida, USA

ABSTRACT

Given the current influx of visitors as well as development of destinations and attractions in Russia, there has been limited number of institutions that have focused on tourism related curricula. The University of Florida, USA and the State University of Nizhni Novgorod, Russian Federation, formed a strategic partnership to improve tourism education at both institutions with the focus on degree curriculum development and pedagogy, faculty and student exchange mobility program, and experiential education involving service learning projects. New curriculum development and on-line delivery are being implemented at both institutions. Service learning projects have been developed for students from both countries to strengthen their understanding of issues pertinent to tourism, hospitality, and destination management. Students are also expected to experience practical applications, improve their language skills and cultural understanding of the host country. During the faculty mobility program, UF and UNN team have engaged to develop, share and partner in teaching methodologies, instructional materials, research initiatives as well as industry outreach activities. The collaboration between the two institutions is funded by The U.S. Department of Education and the Ministry of Science and Education of the Russian Federation.

KEYWORDS: Educational exchange; Industry outreach; Online delivery; Pedagogy; Service learning; Tourism curriculum development

SITUATIONAL ANALYSIS

Tourism is the largest and fastest growing industry in the world with a greater number of people traveling both domestically and internationally than ever before. The Russian Federation is a major tourism market with over 20.6 million in international arrivals that account for \$11.94 billion in international tourism receipts¹. The domestic

¹ Tourism statistics referenced from the World Tourism Organization and World Travel & Tourism Council websites.

market within Russia also accounts for a major economic impact to the economy with significant potential for further growth.

Tourism is an important industry in Russia as visitor expenditures permeate throughout various sectors of the economy and create a multiplier impact in income and employment. The tourism industry encompasses multiple interrelated businesses that include lodging, natural and built attractions, restaurants, travel agents and operators, etc. Given the interdependency of these multiple businesses, it is important to maintain and further enhance tourism with a sustained long-term growth strategy for destinations and the nation's economy. Russia is a vast country with rich tourist resources of all kinds – unique natural features, beautiful landscapes, historical and cultural attractions, places of ethnographic interest, and excellent recreational opportunities. To realize its potential, Russia needs to diversify its tourism product mix beyond the traditional nucleus of Moscow and St. Petersburg and into other regions (Stepchenkova and Morrison 2006, 2008).

The city of Nizhni Novgorod with a population of about 1.3 million people was founded in 1221 and is one of the cultural centers of modern Russia due to its central location, history, and background. It is also referred to as the third “capital” of Russia and is located at the strategic confluence of the Oka and Volga rivers. The city is on the UNESCO list of the top hundred cities worldwide that are most valuable in terms of culture. Evidently, the city attracts a sizeable number of visitors to learn and experience the culture and heritage. Beyond the elements of cultural heritage, the city is also a commercial hub for industry, manufacturing, innovation and research, as well as a major educational center in Russia.

The city and the national government expect to increase international arrivals as the potential to expand this sector to generate more income, employment and other benefits are enormous. Nevertheless, tourism growth is dependent on a number of factors, notably, developing a qualified, trained and skilled labor force. This is evidently the case in Russia as tourism education lags behind that of other disciplines. The shortage of specialists in tourism related professions (e.g., destination planning and development) is rooted since the surge in international visitors following the collapse of the Soviet Union in 1991. Although economic prosperity was cultivated in various sectors, the growth in the hospitality and tourism industry was experienced later. Given the current influx of visitors as well as development of destinations and attractions in Russia, there has been limited number of institutions that has focused on tourism degrees. This is a major limitation when compared with other countries with similar tourist flows. Overall, capacity building and institutional development in tourism education is a fundamental component for the vitality and sustainability of the industry in Russia.

Hence, a primary effort is need to be instituted in developing a qualified, trained and skilled labor force. More importantly, a close working partnership by universities with the hospitality and tourism industry is needed to identify and develop skills. In May 2010 the University of Florida (UF) and the State University of Nizhni Novgorod (UNN) formed a strategic partnership to improve tourism education at both institutions with the

focus on degree curriculum development and pedagogy, faculty and student exchange mobility program, and experiential education involving service learning projects. The proposed model of collaboration between the two institutions was funded by The U.S. Department of Education and the Ministry of Science and Education of the Russian Federation.

STRATEGIC PARTNERSHIP

The greater Nizhni Novgorod region is a major tourist destination but there is a lack of institutions of higher education with a bachelor degree program focused on tourism management. UNN is the largest in the region with 40,000 students and has also received the distinction of being one of the 29 national research universities in the country. More importantly, UNN currently offers a few tourism courses within the Department of International Relations, and it plans to formulate a bachelor degree program in the near future. Moreover, it intends to first develop a concentration in tourism management as the next step towards its strategic implementation of a full curriculum.

UF was established in 1853 and is one of the nation's most academically diverse and largest public universities. It has 16 colleges with 140 departments and 150 research centers and institutes. The Department of Tourism, Recreation and Sport Management (TRSM) is one of the largest programs in the U.S. with a well-deserved national and international reputation for excellence in teaching, research, and professional service. The department offers Bachelor, Master and Doctoral degrees. It also houses the Eric Friedheim Tourism Institute (EFTI) and the Tourism Crisis Management Institute. The Department of TRSM has recently demonstrated commitment towards the formulation of a new as well as a revised curriculum at the undergraduate level with respect to hospitality and tourism management. In collaboration with Warrington College of Business Administration at UF, TRSM offers a Master's Certificate in Hospitality and Tourism, which has immense popularity at the graduate level; courses and revised curriculum for the undergraduate level is in the discussion phase. Thus, this proposal is an opportune time to revise current curriculum as well as develop select courses that will be used in the joint partnership.

As part of the curriculum it is mandated that hospitality and tourism students engage in an applied internship to understand the applications of the industry from a local, national and international perspective due to the global nature of the discipline. Hence, the role of experiential education in the hospitality and tourism discipline is paramount towards the student's skills development process. The application of learning via service learning projects will be designed and implemented during the student mobility exchange for UF and UNN students. Close interactions between students will also foster language development, as well as cultural immersion and understanding.

CURRICULUM DEVELOPMENT

Based on the strategic goal of UNN to offer a bachelor's degree in tourism, the consortium partners evaluated the current course offerings in tourism. Then, they conducted an assessment of existing similar programs in Russia and the U.S., notably UF.

Also, focus group meetings with industry leaders and management staff were held to generate input with respect to skills needed to work in the respective industry. Based on the information, the UF-UNN team collaborated on the development of specifics for the curriculum. In March 2011, the UNN educational proposal has been approved by the Russian Federation authorities. Additionally, UF current curriculum was examined to assess the formulation of a separate hospitality and tourism management concentrations within the bachelor degree program; seven new courses were proposed. In May 2011, the UF proposal has been approved at the TRSM and UF level.

However, the objective of the partnership is not to design each specific course but rather develop a holistic curriculum framework for a bachelor's degree, and more specifically a tourism concentration with input from the industry. In addition, to create select courses that is mutually beneficial and can be offered to UF and UNN students. Within the three-year period, the team is set to develop and deliver three tourism courses at UNN and two at TRSM. These courses are tentatively called "Destination Management", "Cultural Tourism", and "Tourism English".

These topical areas for the courses were chosen to address the particular challenges of the University of Nizhni Novgorod in establishing their tourism degree program. The course "Destination Management" is slated to be a capstone course for the tourism concentration which will include an overview of key issues: tourism arrivals and forecasting, economic impacts of tourism, destination image, branding and promotion, stakeholders in destination development, crisis management, visitor management and sustainability. The course "Cultural Tourism" provides an understanding of the concepts of cultural tourism with a focus on theory, practice, history, terminology, and current issues of planning and management. Additionally, it will cover motives and behavior of cultural tourists, intangible and tangible cultural heritage and interpretation.

Russia is largely perceived as a destination for cultural tourism and is associated with such images as beautiful architecture, onion-shaped domes, historic sites, arts, vast open spaces, and the Volga River (Stepchenkova and Morrison 2006, 2008). The team perceives that shaping the unique identity of Nizhni Novgorod within the domain of Russian cultural tourism is in the interest of the city and the region. Therefore, the course on cultural tourism will help to prepare students to be better equipped to participate in this process. The third course is "Tourism English"- designed specifically to address the language needs of tourism students and professionals working within the hospitality and tourism industry in Nizhni Novgorod. Since English is the medium of communication for international travelers, it is important for current and potential employees to be able to communicate the basics of tourism terminology. This course will be highly interactive and will focus on terminology acquisition and application.

The first two courses will be offered at UF as on-line courses. Similarly, the two courses will be delivered on-line in the Russian language by UNN. The on-line aspect is intended to reach a greater number of people; therefore the courses can be offered to students of various majors, students from other universities, and industry practitioners in Russia, which will increase the value-added component of the project.

Destination Management

Management of tourism destinations is an integral part of providing for sustainability and for controlling tourism's environmental impacts. Destination Management will cover essential aspects of land use planning, zoning concepts, government regulations, and DMO functions and initiatives. Additionally, students will become familiar with the principles of planning and managing geographically diverse tourism destinations.

Topics explored in this course will include an explanation of the tourism system, destination management terms and definitions, sustainability theories, resource analysis, development of destination products, understanding destination image, visitor experience and visitor satisfaction, destination e-business and information management, visitor interpretation centers, management of natural, cultural and indigenous heritage, and planning visitor tours.

Cultural Tourism

The course Cultural Tourism is an online class that will serve as an upper level undergraduate course offered by the Eric Friedheim Tourism Institute (University of Florida) and State University of Nizhni Novgorod (Russian Federation). This course is designed to provide an understanding of the attributes of cultural heritage tourism. Through the analysis of case studies, the history, theory, practice, terminology and current issues in cultural tourism planning and management will be examined. Additionally, a basic survey of cultural and heritage components, motives and behaviors of heritage tourists and attractions, on-site interpretation, sustainability, and government policies will be discussed.

Students will explore current issues in cultural heritage tourism, the roles of host communities in the sustainability of cultural heritage, the question of authenticity, and emerging and non-traditional areas of the field. Students will consider how public policy and the role of international organizations have impacted cultural heritage. In addition, students will look at current threats to cultural heritage sites, such as population pressure, war, and environmental degradation. Students will view cultural heritage tourism through the prism of destination case studies throughout the course.

Tourism English (Students)

Tourism English is an online course for travel and tourism students that uses an evidenced-based approach to teaching tourism concepts through vocabulary instruction. The course is comprised of two primary elements: an interactive web interface that teaches a select tourism lexicon, and a workbook designed to expand and document student progress. The lexicon consists of graphic depictions of travel and tourism terminology, along with the "most common" English words in written text, and a review of American idioms.

Tourism English (Students) employs content-area vocabulary instruction that differs from literature-based vocabulary instruction. In content-area vocabulary instruction word meanings are closely tied to the theme of the lesson. Within the content

areas, vocabulary words are selected for inclusion because they are critical concepts to understanding the content in the subject area. In this context, useful concept instruction integrates new words/concepts with a student's prior knowledge. All content is structured as sets of relationships rather than lists of independent facts.

Tourism English (Industry Practitioners)

For industry practitioners, Tourism English assumes a much lower level of English comprehension than for the "students" course, and the selected lexicon is geared toward everyday guest/host interactions rather than tourism industry concepts. The practitioner course is also comprised of two primary elements of an interactive web interface and a workbook designed to expand and document student progress.

Because basic vocabulary instruction may not increase comprehension when the focus is on memorization or rote learning of definitions, the practitioner course uses concept maps and other graphic organizers for instruction. Concept maps are graphic organizers that depict an idea in a visual display. The associated workbook requires students to discuss each word in terms of four elements: essential characteristics, non-essential characteristics, examples, and non-examples.

FACULTY TRAINING

One of the project objectives is professional development of the UNN faculty with respect to tourism and hospitality education. The project team plans to achieve this objective by a series of workshops spread across the 3-year period of 2010-2013. Three workshops have been conducted so far:

- Introductory Seminar on Curriculum Development at UNN (January 2011)
- E-Learning Seminar at UF (April 2011)
- Tourism Education Seminar at UF (April 2011)
- Service Learning in the Host County (scheduled for September 2011)

The UNN team brought to US in April 2011 a large group (14 people) of administrators, educators, and IT specialists to capitalize on the professional development opportunities at UF. In the first two days of the visit, the delegation had a seminar on E-learning organized and conducted by UF specialists, since the course development includes an online component. When the E-Learning Seminar had concluded, the UNN group moved to the Tourism Education seminar. It was highly interactive and hands-on, since the goal was to show how an established tourism curriculum and education can function in a major USA university. The seminar included the following professional development sessions:

- Curriculum Development Framework – at the session a framework of curriculum overhaul and development conducted by the TRSM faculty committee was presented;
- Tourism & Hospitality Research – TRSM master and PhD students presented their research;
- Preparing Students for Real World: Education and Industry Experience – the session explained the internship as part of the curriculum system at TRSM;

- Regional Tourism Development and University Role in It – the session explained how the industry and TRSM cooperate;
- Development of Service Learning Projects – round-table discussion;
- Study Abroad at UF and Language Component – specialists from the Russian Studies Program talked about the language component of student exchange and abroad programs in Russia;
- Experiencing Online Learning – hands-on class in conducted by Director of Curriculum Development of the project, one of the authors of this paper.

Monitoring and evaluation of the partnership plays a significant role in providing information upon which effective decisions can be made regarding the direction of the project, and identification of activities and components that have significant impact and value to the partnership. The team has developed a monitoring, reporting and evaluation plan which includes bringing an external evaluator to assess project outcomes.

STUDENT EXCHANGE

The student mobility exchange is designed to increase the value and educational outcomes as derived from the new courses, as well as enhance language communication skills. UF team in collaboration with the Alachua County Visitors and Convention Bureau will organize a five week tourism service learning projects for UNN students locally and regionally in Florida. The projects will largely be related to tourism marketing and destination management; however, others options can be further explored and integrated in the program. The Visitors and Convention Bureau is the Destination Marketing and Management organization in Alachua County which includes the City of Gainesville, home of the University of Florida. The direct interaction with industry leaders and managers will be a great learning opportunity for students. One of the major outcomes of the project will be to submit a comprehensive report to the UF-UNN team. The exchange program in Nizhni Novgorod will reciprocate similar opportunities for UF students in terms of service learning projects and improving understanding of Russian society, culture and language. Nizhni Novgorod has various tourism sites and hospitality establishments that would benefit from the UF students. The proposed project intends to maintain parity in student exchange, in terms of both the number of students and weeks of exchange.

SUMMARY

The goal of this project is to build capacity to improve tourism education at the State University of Nizhni Novgorod, Russian Federation, and the University of Florida, USA. To achieve this goal, the partner institutions have been engaged since May 2010 in the development of high quality tourism curriculum, which integrates state-of-the art online courses on destination management, cultural tourism and tourism English, as well as research and service learning projects supporting the classroom instruction. The project also involves building ties with the tourism industry in Nizhni Novgorod and Florida with the view of the education being closely related to the tourism industry needs in both countries. Research opportunities for the students and faculty have been identified and industry outreach effort launched at both partner universities. It is important to

highlight that the partnership is mutually beneficial for UF and UNN. More importantly, it is expected that this partnership will continue beyond the project.

REFERENCES

- Stepchenkova, S., & Morrison, A. M. (2006). The destination image of Russia: From the online induced perspective. *Tourism Management*, 27(5), 943-956.
- Stepchenkova, S., & Morrison, A. M. (2008). Russia's destination image among American pleasure travelers: Revisiting Echtner & Ritchie. *Tourism Management*, 29(3), 548-560.

A Preliminary Investigation into the Antecedents of Volunteer Participation in Mega

Sports Events

Kai (Natalia) Jiang

Honggen Xiao

Hanqin Zhang

School of Hotel and Tourism Management

The Hong Kong Polytechnic University, Hong Kong SAR

ABSTRACT

Volunteering in Mega Sports Events (MSEs) has been gaining increasing popularity among volunteers in China. As a pioneering attempt to explore volunteering in MSEs, this preliminary research employs a case study of the Universiade SHENZHEN 2011 to address issues pertaining to Chinese MSE volunteers' motivation, perception of external attractiveness, satisfaction and intention to volunteer in future opportunities. A model of determinants and antecedents of volunteer participation in MSE contexts was proposed and pilot-tested with data collected during a field survey in Universiade SHENZHEN 2011. The findings show that statistically significant and positive associations exist between MSE volunteers' perceived level of satisfaction and their intention to participate in future volunteering opportunities. Furthermore, the result proves that increase in satisfaction of external attractiveness, e.g., efficient and widely recognized organizing committee can lead to advanced level of satisfaction, while intrinsic motivation fulfillment was proved to play only an insignificant role in influencing satisfaction, a distinctly new finding which was not identified in previous research undertaken in other countries and/or contexts.

KEYWORDS: External attractiveness; Intention; Intrinsic Motivation; Mega Sports Events (MSE); Volunteer; Satisfaction.

INTRODUCTION

A nation's sporting achievements are viewed as an indicator of the overall national power. In China, participation in sports events is massive in scale in recent years. Since China's Reform and Opening-up Policy in 1979, with the continuous increasing of global market share and upgrading of international popularity and status, China has successfully held a number of worldwide mega events, for instance, the 2008 Beijing Olympic Games and the 2010 Guangzhou Asian Games. It is generally perceived that China has properly represented its enthusiasm and increasing competitiveness to maximize the success of each MSE hosted.

Apparently the success of mega events should be attributable to a variety of contributing sources. Basically, sufficient economic foundation, appropriate political maintenance, and extensive community encouragement and involvement are all vital in promoting an event's success. Additionally but very importantly, apart from strong government leadership and effective community support, the massive supports from non-governmental organizations, e.g., the Red Cross and various volunteering associations can not be neglected. What is noticeably observed in Chinese MSEs in the last twenty years is the substantial scale of MSE volunteer participation, strengthening and highlighting the overall managerial effectiveness of mega events. As such, it is imperative that MSE organizations effectively design and operate volunteer programs to capitalize on volunteer strength to achieve event success.

Table 1 below illustrates a few MSEs held in China in the last twenty years. In each of these events, volunteers have played essential roles. For the Beijing summer Olympics, a remarkably milestone in the history of Chinese volunteer participation in MSEs, the number of volunteers surpassed all of those in previous Olympic Games, e.g., Los Angeles 1984 (28,742), Seoul 1988 (27,221), Barcelona 1992 (34,548), Atlanta 1996 (60,422), and Sydney 2000 (50,000) (Moreno, Moragas, & Paniagua, 1999), reaching an unprecedented high. Olympic volunteers' commitment and support were contributing for each step of the event's operation and proceeding. By kindly answering visitors' questions, directing them to different pavilions, and introducing various facilities and information of sports arenas, they built up on the widely recognized volunteer image fostered in previous MSEs, further exemplifying the Chinese image of dynamic event volunteering enthusiasm. Olympic game visitors gain a much deeper understanding of the Olympic spirit by interacting with volunteers. The whole volunteer body consisted of nearly 100,000 game volunteers serving in sports arenas, such as the National Stadium (known as the Bird's Nest), 400,000 city volunteers providing services in places like X, X, and X, and 1,000,000 social volunteers serving in XXX.

Table 1 Recent Mega Sports Events in China

Year	Mega Event	Host City	Number of Volunteers Participated		Number of Countries, Regions & International Organizations Participated	Number of Athletes & Officials Participated
1990	11 th Asian Games	Beijing	200,000		37	6,578
2008	29 th Olympic Games	Beijing	Game volunteer	100,000	204	11,438
			City volunteer	400,000		
			Social Volunteer	1,000,000		
			Total	1,500,000		
2010	16 th Asian Games	Guangzhou	Game volunteer	85,000	45	Around 12,000
			Social volunteer	500,000		
			Total	585,000		

Source: BOCOG, 2008; IOC, 2010

MSE volunteer motivation and satisfaction should be recognized and understood by both academia and event organizations in order to stimulate sustained volunteering participation. Just as Yoon, Lee, and Lee (2010) suggested, it is important to understand “post-visitation festival experiences” (p. 341), which would facilitate the effective planning and construction of appealing festivals and events that can encourage repeat visitation and visitor loyalty. Although the constructive role of volunteering in events has already been identified and commended, much of volunteers’ work still goes unrecognized and under-researched (Research Centre for Sport in Canadian Society & Centre for Sport Policy Studies, 2005), especially when it comes to the case of an authentic Chinese MSE. This paper, therefore, is dedicated to investigating Chinese MSE volunteer intrinsic motivation, perceived external attractiveness, and satisfaction, which inform the structural composition of antecedents of MSE volunteering intention.

The main purpose of this preliminary study is to test the verification of the selected instrument pool, add or delete invalid and insignificant indicators, and serve as the initial step towards identifying the antecedents of MSE volunteer future participation intention. It should be noted that due to discrepancies in social democratic, culture identity, and the different roles government play in social system, it is highly possible for Chinese MSE volunteers to show certain behavioral preferences which are distinctly different from those in other countries. Certain new discoveries which have never been identified by researchers who examine volunteering involvement in western countries are indeed expected.

LITERATURE REVIEW

Volunteering in mega events is an emerging area of research in the field of event management, and has drawn considerable attention from the academics. Previous researchers have applied various theories (e.g., self determination theory, volunteer function inventory, etc.) to understand volunteering behavior. As such, intrinsic factors (e.g., competence motive, relatedness motive, and autonomy motive) are often noted as antecedents of volunteers’ satisfaction with a mega event, and consequently of their participation intention in future mega events as a volunteer. Houle, Sagarin, and Kaplan (2005, p. 342) emphasized the multiple functions served by volunteerism by arguing that “volunteerism may serve more than one motive for an individual and, also, different motivations may be served within a group of volunteers performing the same activity”.

Many volunteer organizations in nonprofit sectors, as noted by Finkelstein (2008), could not survive without volunteers’ joint effort and non-materialistic involvement; therefore, effective recruiting and retention are considered key concerns for volunteer associations (Finkelstein, Penner & Brannick, 2005) who aim to pace the way for an event’s success by massive volunteering participation. Allison, Okun and Dutridge (2002) reconfirmed that understanding the reason why people show great interest in volunteer work facilitates the organizer’s recruitment and programming and helps organizers combine specific volunteers’ needs with related work categories.

Notably, Intrinsic Motive Fulfillment drives people to enroll as MSE volunteers in the initial

stage. Three categories of intrinsic motive fulfillment have been identified in literature review, namely relatedness motive fulfillment, competence motive fulfillment, and autonomy motive fulfillment. Specifically, relatedness motive fulfillment is defined as MSE volunteers' level of satisfaction regarding their relatedness need; autonomy motive fulfillment is MSE volunteers' level of satisfaction regarding their autonomy need; competence motive fulfillment is perceived satisfaction rooting in competence need contentment. A point to emphasize here is that Boezeman and Ellemers (2009) have confirmed the insignificant relevance of competence motive fulfillment with volunteers' level of satisfaction, and their intention to continue cooperating with volunteer organizations.

External factors, according to Strigas and Jackson (2003, p. 119), serve to evaluate "motives related to factors outside of their immediate control, like family traditions and significant others". Besides internal motivations, external factors also exert a strong impact on volunteer satisfaction and future participation intention. For instance, a prospective MSE volunteer may participate merely because his friends or families are currently members of a certain MSE volunteer team or because of his positive perception of the real-time communications with MSE volunteer organizations. Strigas and Jackson (2003), in their study of volunteer motivation in a regional marathon competition, indicated a new five-dimensional internal structural motivation solution to explain marathon running volunteer motivation: external factors, material, purposive, leisure, and egoistic. The findings proved to fit the original Volunteer Function Inventory (VFI) proposed by Clary, Snyder, Ridge, Copeland, Stukas, Haugen, and Miene (1998). What should be clarified here is that external factors identified in this investigation were supposedly very similar to the external traditions put forward by Farrell, Johnston, and Twynam (1998) and Strigas and Jackson (2003). Additionally, regarding the mutual correlation between perceived external attractiveness and future participation intention, Cnaan and Goldberg-Glen (1991) suggested that volunteers' perceived attraction of voluntary work lead to sustained willingness for volunteerism.

The value of investigating the underlying factors leading to volunteer satisfaction or discontentedness is that volunteerism will be stimulated and sustained only when volunteers can perceive the value and attractiveness of volunteering, and their motivational drives and other needs are understood and fulfilled. As noted by Davis, Hall, and Meyer (2003), it is motive fulfillment, rather than their importance, that sustains volunteerism. Finkelstein (2008) has pointed out the correlation between volunteer motivation satisfaction and future behavior intention by testing an assumption existing in the functional approach: motive fulfillment is correlated with intention to help, and it can sustain and predict helping behavior when volunteers experience satisfaction.

Despite some published research on volunteer motivation (e.g., Boezeman & Ellemers, 2009; Clary & Snyder, 1998), there is a notable gap in the scientific literature on volunteer motivation and their future volunteering intention in the context of mega sports events (MSEs). Especially in the Chinese MSE context, research on volunteers' motivation, satisfaction and future behavioral intention is equally scarce. This research, therefore, attempts to fill this research gap partially by proposing a model of determinants and antecedents of volunteer participation in a MSE context (Figure 1), and identifying the relationships among MSE volunteers' motivation, satisfaction and future participation intention.

METHODOLOGY

Study Purpose

This preliminary investigation attempts to understand MSE volunteers' intrinsic motivation, levels of satisfaction and their future volunteering intention through a field survey of the Universiade SHENZHEN 2011. To address motivational/behavioral issues relating to the MSE volunteers, a model of antecedents of volunteer participation in a MSE context (Figure 1) is proposed and tested with data from 51 self-administered questionnaires collected as a pilot study of the Universiade SHENZHEN 2011.

Conceptual Model

As illustrated in Figure 1, three hypotheses are developed around the notions of intrinsic motivations, satisfaction and behavioral intentions pertaining to volunteering in MSEs. Based on existing literature, it is theoretically hypothesized that 1) the more MSE volunteers' intrinsic needs are fulfilled, the higher the level of satisfaction MSE volunteers will express; 2) There exists a positive association between perceived external attractiveness and perceived MSE volunteering satisfaction; and 3) MSE volunteers who have experienced a higher level of satisfaction will express a greater intention to involve in future MSE opportunities.

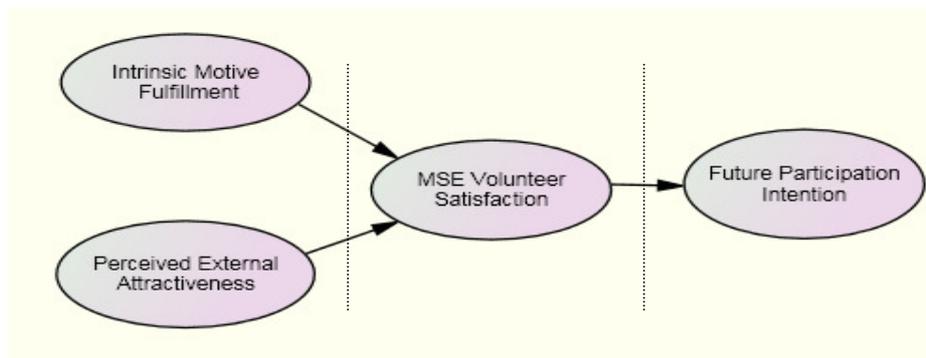


Figure 1
Conceptual Structure of Antecedents of MSE Volunteer Participation (Latent Variables)

Sampling and Measures

A location-based sampling method was employed to get the final pre-test sample of 51 Universiade volunteering serving in 5 U-stations. U-station is a specific term emerged in Universiade Shenzhen 2011, meaning an officially designated service station where volunteers provide Universiade-related booklets and consulting help for game audience, citizens, and athletes, etc. As suggested by Hair, Anderson, Tatham, and Black (1995, p. 373), basically 50 sample is required for conducting principle component factor analysis which was used in data analysis of this research, thus the sample size of 51 sample is adequate in this regards. Moreover,

the sample size should allow each manifest indicator to have at least 5 persons for measurement (Hair et al., 1995), thus a sample of 65 is required to test the instrument pool of 13 manifest indicators in this research. However, considering this is a pre-test merely aiming to preliminarily understand the profile of MSE volunteers in China, and the full sample in the main survey would undergo a much more thorough examination, the fact that the number of survey respondents did not surpass a ratio of 1:5 is deemed acceptable, as the case in Jones' (2000) research project.

In order to address the hypotheses derived from the conceptual framework (Figure 1), a set of measurement items have been selected from the existing literature with proper modification. In addition, an one-hour focus group discussion with 10 Universiade volunteers was conducted to generate comments to revise and modify items that can not truly reflect the specific context of the Universiade, considering the characteristics of Chinese volunteering. Additionally, a few innovatively necessary items emerged from this focus group discussion were added into the finalized research instruments. Finally, 13 manifest indicators under four constructs were remained for the testing.

Indicators of intrinsic motive fulfillment were borrowed with revision from Boezeman and Ellemers (2009) to fit into the Universiade SHENZHEN 2011 settings. For instance, the original indicator "At my organization, I really like the people I work with" has been modified to be "At the volunteer team in the Universiade, I really like other volunteers that I work with".

The construct Perceived External Attractiveness includes items to test perceived attractiveness of event organizational attributes, host city's profile and fame, family traditions, and folklore and culture of the host city. This construct examines the degree to which external factors that MSE volunteers can not directly control affect their level of satisfaction.

MSE Volunteer Experience Satisfaction is assessed based on a set of selected instruments initially established by Farrell, Johnston, and Twynam (1998). Manifest indicators of MSE Volunteers' Future Participation Intention were modified after Hidalgo and Moreno (2009), and Um, Chon, and Ro (2006). For example, the original item adopted by Hidalgo and Moreno (2009) is "I would like to go on collaborating with this association for many years" (p. 598); the modified one is "I would like to go on collaborating with MSE volunteer programs in future Chinese MSE opportunities." Indicators under all of the four constructs are evaluated with a 5-point Likert scale.

RESULTS

Descriptive Statistics

As shown in Table 2, females account for more than half of the pilot test sample (52.9%). The majority of respondents are youngsters (39.2%) aging between 18 and 28. Most of the volunteers report an annual income of above 40,000 (37.3%), being educated with university degree (47.1%). Additionally, respondents' occupations range from student, teaching staff, to medical workers. Moreover, as Table 3 displays, all the four constructs indicate satisfying reliability coefficients (Cronbach's alpha are all above 0.7), with the overall reliability coefficient for all the items being 0.89.

Table 2 Respondents' Demographic Information

Characteristics	N	%
Gender (n=51)		
Male	24	47.1
Female	21	52.9
Age (n=51, S.D.= 1.039)		
18-28	20	39.2
29-38	18	35.3
39-48	6	11.8
above49	7	13.7
Annual Household Income (n=51, S.D.= 1.13)		
below15000	9	17.6
15001-20000	10	19.6
20001-40000	13	25.5
above40000	19	37.3
Education Level (n=51)		
Middle School	11	21.6
High Diploma	14	27.5
University	24	47.1
Postgraduate or above	2	3.8
Occupation(n=51)		
Student	4	7.8
Teaching Staff	4	7.9
Medical Staff	5	9.8
Govement Staff	2	3.9
Others	36	70.6

Table 3 Construct and Item Reliability

Constructs	A	M	S.D.
Intrinsic Motive Fulfillment (IMF)	0.71	13.80	1.43
Perceived External Attractiveness (PEA)	0.72	13.18	1.60
MSE Volunteer Satisfaction (MVS)	0.86	17.00	2.25
Future Participation Intention (FPI)	0.76	13.84	1.30

Overall Cronbach's alpha: 0.89

Two- Way Approach

This research provides a 95% confidence interval with a margin of error of about $\pm 5\%$. The collected data was analyzed using AMOS 18.0 to test possible multiple inter-relationships between the four latent constructs. Exogenous and endogenous variables have already been identified in Figure 1.

A two-step strategy has been applied to analyze the model. Firstly, the model was analyzed as a measurement model, aiming to test the validity of each research item; a Confirmatory Factor Analysis was performed of all the items to generate specific factor loadings, with items having factor loading above 0.5 being retained (I1, I2, I5; P3, P6, P7; S1, S4, S5, S6; F1, F2, F4). As shown in Table 4, all of the remained items display statistically significant p-value, which is smaller than 0.005.

Table 4 Confirmatory Factor Analysis

	Standard Regression Weight	S.E.	C.R.	P
I5 <--- Intrinsic Motive_ Fulfillment	0.530			
I2 <--- Intrinsic Motive_ Fulfillment	0.719	.308	3.329	***
I1 <--- Intrinsic Motive_ Fulfillment	0.804	.322	3.464	***
P7 <--- Perceived External_ Attractiveness	0.648			
P6 <--- Perceived External_ Attractiveness	0.602	.323	3.717	***
P3 <--- Perceived External_ Attractiveness	0.733	.281	4.374	***
S6 <--- MSE Volunteer_ Satisfaction	0.789			
S5 <--- MSE Volunteer_ Satisfaction	0.817	.211	6.079	***
S4 <--- MSE Volunteer_ Satisfaction	0.782	.188	5.775	***
S1 <--- MSE Volunteer_ Satisfaction	0.713	.167	5.186	***
F1 <--- Future Participation_ Intention	0.501			
F2 <--- Future Participation_ Intention	0.840	.355	3.601	***
F4 <--- Future Participation_ Intention	0.874	.483	3.533	***

All these above items were measured using 5-point Likert scale, with 1 representing “totally disagree” and 5 representing “totally agree”, or 1= “Highly satisfied” and 5= “Highly dissatisfied”.

After that, the model is run as a structural model in order to examine the path loadings between latent variables, with the three hypotheses tested. Both the measurement model and the structural model show good model fit indices (Table 5).

Table 5 Model Fit

Model	χ^2	df	RMSEA	CFI	RMR
Measurement Model	60.878	58	0.032	0.989	0.032
Structural Model	78.575	60	0.079	0.930	0.072

DISCUSSION AND CONCLUSION

The testing of structural model lent strong support to two of the three research hypotheses presented. To be specific, structural model analysis revealed that there exist positive and statistically significant regression relationships between perceived external attractiveness and MSE volunteering satisfaction, and between MSE volunteering satisfaction and their future participation intention (both significant at $p < .005$). In other words, as perceived external

attractiveness increases, MSE volunteers are more likely to experience satisfaction from participating in voluntary service during MSEs, thereby promoting sustained volunteer involvement, because the results show that the more satisfied volunteers feel, the more likely they will participate in future MSE volunteering.

It should be noted that the path relationship between intrinsic motive fulfillment and MSE volunteering satisfaction turns out to be statistically insignificant, with a p-value of 0.291, a result entirely different from that under the western context discussed in the existing literature. This finding reaffirms one distinct characteristic of Chinese volunteering as an authority-initiated-but-socially-operated activity. In fact in the Chinese context, the reason people want to join volunteer programs is a combination of the unique Chinese social-cultural environment and personal motives. Compared with the emblematical western mode of “self-initiated” (Hustinx & Lammertyn, 2003, p. 180) volunteerism, the Chinese mode of volunteering is more embedded in volunteer organizations’ promotion and government’s encouragement. Volunteers do have certain intrinsic motivations, but they appear to be much weaker when compared with external attractiveness, such as governmental appealing, event organizing committee’s promotion and extensive opportunities to just be one to witness a magnificent part of the history.

Considering this uniqueness, the remarkable leading roles of official organizations and organizing committees in invoking interest in volunteering should be highlighted. Item P3 and P7 ask about the extent to which the respondents support the Universiade organizing committee’s goals and objectives, and the extent to which they perceive this organizing committee as widely acknowledged and trusted. Both items indicate a statistically significant p-value of smaller than .005, meaning that volunteers surveyed perceive organizing committee’s influence as substantial. It is suggested that Chinese MSE volunteering organizations should work harder to inspire people’s intrinsic motivation in order to encourage longer and sustained volunteering.

This study serves as an initial attempt to investigate Chinese MSE volunteers’ motivation, satisfaction and future participation intention. Thus, its findings partially fill the knowledge gap on Chinese MSE volunteers’ motivation, satisfaction and future behavior intention, illuminate event volunteer motivation and intention theory and complement to research instruments on volunteering in MSEs.

Limitations in association with this research, however, are inevitable. Firstly, a comparison study is indeed preferred, especially with the authentic findings of volunteers in previous MSEs in China, e.g., the 2008 Beijing Olympic Games and the 2010 Asian Games. However, since this study serves as the very initial attempt to explore Chinese MSE volunteers’ profile, the existing scarcity of research into Chinese MSE volunteers in previous sports events leaves no platform for comparison, making the findings of this study open to be drawn upon and compared by future researchers. It should be noted that a great number of Chinese volunteers who previously participated in volunteer service during the 2008 Beijing Olympics show great interest in volunteering for the 2010 Asian Games. Thus the perceptions of previous voluntary experience may to some extent influence volunteers’ intention to participate in current or future mega events. Those with satisfactory experience will be inclined towards committing longer and more deeply in current and future events; they may even encourage relatives or colleagues to participate, thus

creating a snowballing effect.

Secondly, in terms of sampling limitations, as discussed earlier, since this study serves as a pre-test of the hypothesized model (Figure 1), the limited sample size might limit the generalizability of the research findings. However, it could be anticipated that the adequate sample size in the main survey will help expand the related generalizability. Besides, the certain demographics of the sample (e.g., age) may only be representative of the MSE volunteer population in China instead of the general/overall volunteer population and, least of all, of census population of the country.

REFERENCES

- Allison, L.D., Okun, M. A., & Dutridge, K. S. (2002). Assessing volunteer motives: A comparison of an open-ended probe and Likert rating scales. *Journal of Community & Applied Social Psychology, 12*(4), 243-255.
- Boezeman, E. J., & Ellemers, N. (2009). Intrinsic need satisfaction and the job attitudes of volunteers versus employees working in a charitable volunteer organization. *Journal of Occupational & Organizational Psychology, 82*(4), 897-914.
- Clary, E. G., Snyder, M., Ridge, R. D., Copeland, J., Stukas, A. A., Haugen, J., & Miene, P. (1998). Understanding and assessing the motivations of volunteers: A functional approach. *Journal of Personality and Social Psychology, 74*(6), 1516-1530.
- Clary, E. G., & Snyder, M. (1999). The motivations to volunteer: Theoretical and practical considerations. *Current Directions in Psychological Science, 8*(5), 156-159.
- Cnaan, R. A., & Goldberg-Glen, R. S. (1991). Measuring motivation to volunteer in human services. *The Journal of Applied Behavioral Science, 27*(3), 269-284.

- Finkelstein, M. A. (2008). Volunteer satisfaction and volunteer action: A functional approach. *Social Behavior & Personality: An International Journal*, 36(1), 9-17.
- Finkelstein, M. A., Penner, L. A., & Brannick, M.T. (2005). Motive, role identity, and prosocial personality as predictors of volunteer activity. *Social Behavior and Personality*, 33(4), 403-418.
- Hair, J. F. J., Anderson, R. E., Tatham, R. L., & Black, W.C. (1995). *Multivariate data analysis with readings* (4th ed.). Upper Saddle River, NJ: Prentice Hall.
- Hidalgo, M. C., & Moreno, P. (2009). Organizational socialization of volunteers: The effect on their intention to remain. *Journal of Community Psychology*, 37(5), 594-601.
- Houle, B. J., Sagarin, B. J., & Kaplan, M. F. (2005). A functional approach to volunteerism: Do volunteer motives predict task preference? *Basic & Applied Social Psychology*, 27(4), 337-344.
- Hustinx, L., & Lammertyn, F. (2003). Collective and reflexive styles of volunteering: A sociological modernization perspective. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*, 14(2), 167-187.
- Jones, D.L. (2000) A determination of interpersonal interaction expectations in international buyer-seller relationships. Unpublished PhD thesis, XXX Department, XXX University.
- Moreno, A. B., Moragas, M., & Paniagua, R. (1999, November 24-26). The evolution of volunteers at the Olympic Games. Retrieved from <http://olympicstudies.uab.es/volunteers/moreno.html>

- Research Centre for Sport in Canadian Society & Centre for Sport Policy Studies (CSPS). (2005, March 31). *Volunteerism: Researching the capacity of Canadian sport*. Retrieved from <http://www.crssc.uottawa.ca/volunteerism.pdf>
- Strigas, A. D., & Jackson, E. N. (2003). Motivating volunteers to serve and succeed: Design and results of a pilot study that explores demographics and motivational factors in sport volunteerism. *International Sports Journal*, 7(7), 111-123.
- Um, S., Chon, K., & Ro, Y. (2006). Antecedents of revisit intention. *Annals of Tourism Research*, 33(4), 1141-1158.
- Yoon, Y. S., Lee, J. S., & Lee, C. K. (2010). Measuring festival quality and value affecting visitors' satisfaction and loyalty using a structural approach. *International Journal of Hospitality Management*, 29(2), 335-342.

Female Gender Advantage in Leadership Styles in Hotel Operations

Xiaoyang Zhang

Hospitality and Tourism Management

Florida International University, USA

ABSTRACT

This Delphi study attempts to explore the female advantages of transformational leadership style in the hotel domain. By interviewing fifteen professionals specialized in gender and leadership in hotel operations, this paper aims to suggest that participative and people-oriented female executives who were endowed with a style consistent with transformational leadership, are indeed more effective than male leaders in hotel operations. Consequently, this advanced leadership style can be defined as an advantage for female hotel executive managers. The worldwide shortage of female executive in hotel operations has been discussed in recent years. This paper seeks to highlight the effectiveness of females' leadership styles in hotel operations which should influence organizations to value gender advantage of female leaders and potential female leaders.

KEY WORDS: gender difference, gender advantage, hotel operations, leadership, transformational leadership

INTRODUCTION

Recent statistics indicate that, after some progress in expanding participation in executive positions, females nowadays accounts for 18% of all senior leaders (White House Project, 2009), while women labors make up 46.8% of the whole general workforce, in the United States (US Dept. of Labor, Labor statistics, 2011). Schein (2007) claimed that the rate of women entering the senior level of management was increasing, however slowly and unevenly. Moreover, existing studies (Burgess, 2003; Sparrowe & Iverson, 1999; Ng & Pine, 2003; Skalpe, 2007; Sumer, 2006) stated that in many countries, female leaders' pay was indeed lower than what males in the same senior management positions received.

In service-centric domains, such as hotels, careers were gendered in many countries (Sinclair, 1997). Women mostly occupied lower-level positions with less pay and lower job satisfaction than what males were offered in hospitality industry (Guerrier & Adib, 2004); whereas men dominated senior management positions with better pay and benefit packages (Garavan, O'Brien, & O'Hanlon, 2006). By way of illustration, Ng and Pine (2003) indicated that with lower pay than male leaders in hotels, females only make up 7.2% of all hotel general managers while females took more than half of the jobs in hotel operations in Hong Kong. In addition, Ludking (1999) emphasized that the

difference between the numbers of female and male college students who participated in hospitality programs was barely noticeable; however, the difference between the percentage of female and male leaders in hotel operations was enormous.

These statistics stand in the need of explanation, possible barriers for female potential leaders to develop their careers have been discussed and identified as: 1.) the glass ceiling rendered by gender discrimination, 2.) an absence of role models, and 3.) exclusion from “old boy networks” (Brownell, 1994a; Knutson & Schmigdall, 1999). In contrast, based upon a survey of 447 participants from U.S full-service hotels’ Executive Operating Committee, Beck (1996) argued that gender was no longer a barrier for a female executive’s management development.

Assuming that Beck (1996) stated the truth, do those statistics indicate that female leaders are less effective than males by gender in hotel operations? The answer is undiscovered due to the lack of study on the particular issue.

Leadership styles were the most important competence when discussing leadership effectiveness in hotel operations (Brownell, 1994b). Hence, this paper aims to discuss the particular effectiveness of female leaders in hotel operations, on the basis of analyzing their mostly favored leadership styles, by answering the following three questions:

1.) Which leadership style is more effective in hotel operations, transactional leadership or transformational leadership? What are the essential elements of the more effective leadership?

2.) Working from the assumption that female leaders favor transformational leadership style while male leaders prefer transactional leadership style, are women leaders more effective than men leaders in hotel operations, and if so, why?

3.) When both males and females adopt the more effective leadership in hotel operations, how does gender virtue differentiate females from males in leadership effectiveness? Do these differences render females better leaders than males in hotel operations?

LITERATURE REVIEW

A new era for females in executive roles, under a realignment of structure and culture in the United States, has been extensively announced and discussed in the press (Burke & Collins, 2001). While women increasingly occupy leadership positions in domains of politics, education, and the military, as well as business, discussions of the distinct leadership styles and advanced effectiveness of female leaders, have appealed to researchers in the recent decades (Anderson, Lievens, Van Dam, & Born, 2006; Appelbaum, Audet, & Miller, 2002; Burke & Collins, 2001; Eagly & Johannesen-

Schmidt, 2001; Eagly, Johannesen-Schmidt, & Van Engen, 2003; Valentine & Godkin, 2000).

Bass (1981), one of the greatest researchers in the management field, started the discussion by stating that there was no difference of gender tendency in leadership styles. However, ever since Rosener, McAllister, and Stephens (1990) questioned Bass (1981), the perception of a lack of gender differences in leadership has been continuously disputed in the last two decades (Burke & Collins, 2001).

In the beginning of the 21st century, researchers' attention has shifted to debating female gender advantages in leadership (Appelbaum et al., 2002; Burke & Collins, 2001; Eagly et al., 2003; Vecchio, 2002). Nowadays, more and more females have been gradually entering in executive roles in hotels. In the specific environment of hotel operations, do female leaders maintain gender advantages in leadership styles and effectiveness?

Female Leaders in Hotel Operations

Li and Leung (2001) demonstrated that due to the gendered nature of being considerate and socially skilled, females mostly launched their leadership careers in departments such as the front office and sales/marketing, which emphasize interpersonal communication. However, managers in these departments found it more difficult to enter positions of senior management (Burke, Koyuncu, & Fiksenbaum, 2008). Meanwhile, male managers participated in areas where they practiced discipline and task-oriented leadership (Woods & Viehland, 2000). By way of illustration, financing control, property management, and purchasing were the areas that male managers started their leadership development in hotels. Such areas were more likely to render employees executive leaders (Garavan et al., 2006).

Brownell (1994a) claimed that during their management development, most female leaders have adopted behaviors from the traditional leadership style that established by males. Accordingly, few differences were found in terms of leadership styles on the basis of gender, between male and female senior managers in hotel operations.

However, Maxwell (1997) argued that when compared with male senior managers with task-oriented leadership, female leaders: 1.) performed with better communication skills by gender, 2.) expected consistent teamwork with focuses on details, 3.) established an open-management by frequent communication with peers and staff, 4.) demonstrated sensitivity of staff's reaction to the leadership and flexibility to accommodate behaviors accordingly, 5.) presented great tendency of teamwork. In contrast, male hotel leaders were reported focusing on: 1.) integrity, 2.) masculine traits, and 3.) task-oriented leadership behaviors, which completely differentiated males' leadership from females' in hotel operations (Brownell, 1994a; Lewis & Fagenson-Eland, 1998).

Females' Differed Leadership Styles

Scholarly articles in recent years have focused on that female leaders demonstrated a differentiated preference from male leaders on transformational leadership style, a style dominated by the characters and values of gender virtue, presented by behaviors of: 1.) relationship building, 2.) inter-personal and participative communicating, as well as, 3.) team working (Anderson et al., 2006; Appelbaum et al., 2002; Burke & Collins, 2001; Eagly & Johannesen-Schmidt, 2001; Eagly & Carli, 2003; Vecchio, 2002; Valentine & Godkin, 2000). According to perceptions of their subordinates, differences between females' and males' leadership styles indeed existed. Females' leadership presented a greater interpersonal aspect, meanwhile males' leadership reflected more focus on structure (Valentine & Godkin, 2000). Likewise, through the meta-analysis, Eagly and Johannesen-Schmidt's (2001) study demonstrated that females' leadership styles were more democratic than males, while male leaders tended to task-oriented styles based on the different values (Eagly & Johannesen-Schmidt, 2001). By reviewing the landscape of previous theories, Appelbaum et al. (2002) concluded that when women emerged to lead, presented tendencies of being: 1.) considerate, 2.) participative, 3.) social-expressive, 4.) transformational, and 5.) people-oriented, which assembled to the transformational leadership style; meanwhile, men preferred utilizing: 1.) instructions, 2.) business-oriented messages, 3.) autocratic and transactional leadership styles, and 4.) structure, as the transactional way to lead. The construct-driven investigation based on a sample of 1,857 candidates of leaders by Anderson et al. (2006), reinforced the claim of previous studies that females were remarkably higher rated on the interpersonally oriented leadership style, a style consistent with transformational leadership, which differentiated females from males in leadership styles.

Moreover, Burke and Collins (2001) stated that when compared to males, females present interactive leadership behaviors more frequently, pertaining to the transformational style, were more likely to be adopted by females. However, the sample collecting was limited in one sort of profession, accountants. As a consequence, these findings serve the best when specifically representing leaders in the domain of accounting. In addition, Eagly et al. (2003) found that female leaders also manifested contingent reward, a behavior pertaining to transactional leadership style. However, male leaders mostly utilized other behaviors of transactional leadership style (Eagly et al., 2003).

Advanced Effectiveness of Female Leaders

Furthermore, researchers suggested that women leaders with different leadership styles were indeed more effective than men leaders in contemporary organizations, organizations on the basis of teamwork (Appelbaum et al., 2002; Burke & Collins, 2001; Eagly & Carli, 2003; Eagly et al., 2003). Findings of Burke and Collins (2001) indicated that female accountants, with transformational leadership styles, were perceived more effective than males, due to two aspects: 1.) coaching and developing, and 2.) communicating. Moreover, transformational leadership style which was mostly adopted

by women was tested to be more effective than others, when founding an inclusive and inspiring environment by supporting and encouraging employees (Appelbaum et al., 2002). Accordingly, Appelbaum et al. (2002) stated that female leaders were more effective than male leaders in consensually-driven and team-based organizations. A meta-analysis computing the data of extended studies on different leadership styles with a common metric of effect size was done by Eagly et al. (2003). This study presented that 92% comparisons bolstered that women leaders mostly manifested a democratic or participative leadership style. This style could be particularly advantageous for females under the temporary conditions of organizations (Eagly et al., 2003). Women with a democratic or participative leadership style demonstrate greater social skills by gender than men. Therefore, females were seen better facilitating collaborative than males amongst peers and subordinates, especially for those who might be resistant to female leaders (Eagly & Carli, 2003).

Nonetheless, while admitting the gender differences in leadership styles, Vecchio (2002) stated that female leadership advantage by gender tendencies had been overstated. Specifically, Vecchio (2002) stated that there was little difference in effectiveness by gender when males and females both lead in the transformational leadership style, with critiques on the unconvincing samplings in contradictory studies. Eagly and Carli (2003) agreed with Vecchio (2002) on leadership effectiveness by gender differentiated in a particular leadership style. However, Eagly and Carli (2003) argued that Vecchio (2002) did not provide sufficient explanation for the conclusion as a lack of gender advantage in leadership effectiveness. There were two critical aspects not mentioned in Vecchio (2002), which undermined the strength of the conclusion. Accordingly, Eagly and Carli (2003) demonstrated these two essential concerns on how the environment cultivate females to be more advanced than men as leaders: 1.) influences of gender roles in the society can internally modify females' transformational leadership; 2.) the glass ceiling and double standards may facilitate females being more skilled in leadership than males.

Effective Leadership in Hotel Operations

Through conducting the survey responses from fifty-six members of Palm Beach County Hotel Association, Kay and Russette (2000) defined Essential Competences of leadership in hotel operations: 1.) customer-centered, 2.) role-modeling, 3.) ethical, and 4.) trust and conceptual-creative. Nevertheless, the responses were collected from a limited number of participants in one resort area.

Patier and Mia (2009) presented that the practice of hotel general managers' transformational leadership significantly influenced the financial performance of operational departments, for instances, food and beverage department and rooms department. For being motivating as well as collaborating, general managers' transformational leadership enhanced the employees' job satisfaction, which resulted in a greater commitment and a better performance in hotel operations (Patier & Mia, 2009). Likewise, Clark, Hartline and Jones (2009) stated that since transformational leaders were more efficient in interpreting their expectation of service quality by self-

commitment into employees' performance than transactional leaders, transformational leaders were found more effective in hotel operations.

Under an across-sectional research design, Ryan, Tavitiyaman and Weerakit (2009) conducted responses from 503 participants in hotel operations with different age, gender and education level. As a result, Ryan et al. (2009) identified essential leadership competencies for hotel general managers: 1.) leadership, 2.) interpersonal skills for motivation, 3.) strategic orientation, 4.) planning and implementation, 5.) team building and ethics, 6.) skills of communication, 7.) flexibility, and 8.) concern for community. As it indicated in the research results, flexibility and strategic orientation were the least important amongst those eight components (Ryan et al., 2009). Comparing with Kay and Russette (2000), Ryan et al.'s (2009) findings were conducted from a larger sampling with participants from different backgrounds, which reinforced the reliability of the results.

Transformational Leadership Style in Hotel Operations

Leadership style is defined as the approach to leadership behaviors with two clear and independent dimensions: task dimension and relationship dimension (Hersey & Blanchard, 1988). The new trend that emerged in 1990s, categorized leadership styles into two management styles: transformational and transactional (Burke & Collins, 2001).

By appealing to followers' interests by founding and exchanging relationships with them, transformational leaders (Burke, 1986), were also regarded as charismatic leaders for establishing emotional responses amongst followers. Transformational leadership includes four foundational elements: 1.) charisma or idealized influence, 2.) inspiring motivation, 3.) intellectual stimulation, and 4.) individualized consideration (Bass & Avolio, 1990). Transactional leaders, in contrast, aimed to: 1.) clarify tasks, 2.) monitor implementation, and 3.) focus on the exchange of rewards based on subordinates' achievement and performance (Bass & Avolio, 1990).

In Tracey and Hinkin's (1994) study, most hospitality leaders agreed that their primary functions were to outline a vision and to interpret the vision with clearly explained principles. Besides, it is also very important to assist employees understand the vision and ensure they work under the vision (Tracey & Hinkin, 1994). Based on the primary function theory, through examining how hospitality transformational leaders perceived for being effective by followers, Tracey and Hinkin (1994) demonstrated that: 1.) transformational leaders successfully clarified followers' perceptions of vision; 2.) followers perceived clear job descriptions with several aspects from transformational leaders; 3.) transformational leaders provided open communication to followers to ensure employees' effectiveness; and 4.) when followers were presented a direction for achievement of the vision, leaders' satisfaction by employees was significantly positively influenced. In contrast, Tracey and Hinkin (1994) did not successfully find behaviors pertaining to transactional leadership style meeting these outcomes under the same measurement.

Scholarly articles (Appelbaum et al., 2002; Burke & Collins, 2001; Eagly et al., 2003; Vecchio, 2002) provided a foundation for this present study that female leaders preferred transformational leadership style while males were more in favor of transactional leadership style. Based upon this general agreement in the last decade, previous studies (Appelbaum et al., 2002; Burke & Collins, 2001; Eagly & Carli, 2003; Eagly et al., 2003) provided strong support for the concept of gender advantage of transformational female leaders in different areas: education, general business and accounting. Exclusively, Eagly and Carli (2003) presented that even when female and male leaders both performed with transformational leadership style, females were more effective and advanced than males, due to the specialized leadership development for females. Meanwhile, Ryan et al. (2009) outlined nine essential indicators for being an effective leader in hotel operations. These key indicators were consistent with leadership transformational style. On a basis of such conclusion and findings from Tracey & Hinkin (1994), Patiar and Mia (2009) and Clark et al. (2009) claimed that transformational leadership was more effective than transactional leadership in hotel operations. To summarize, female leaders with a preference of transformational leadership style are more effective than males in hotel operations. This summery paved the way for the present Delphi study.

PROPOSED METHODOLOGY

Delphi research method has been tested to be an effective research system to collect professional solutions and suggestions from panelists for complex problems (Kennedy, 2003). Therefore, a three-round Delphi approach is adopted for this study. Academic experts in gender leadership and leadership in hotel operations in the United States will be selected as the participants. Thirty selected panelists will be reached via emails. The sample size is to be at least fifteen. Participants are anonymous to each other during the whole process, yet not to the researcher. Before participating in the program, an invitation email will be sent to each selected professional, explaining the purpose, length, and process of this study. Each round will finish in approximately 10 days.

The research will start with the question: Which leadership style is more effective in hotel operations? What are the essential elements for this particularly effective leadership in the hotel operations? When summarizing all the answers, the top five most frequently mentioned factors in the responses will be listed and presented in the beginning of the second round.

In the second round, participants will be requested to answer the following question based upon the criteria deriving from the results of the first round: Working from the assumption that female leaders are more in favor of the transformational leadership style while male leaders prefer the transactional leadership style, are women leaders more effective than men leaders in hotel operations, and if so, why?

Finally, participants will answer the last question in the third round: When both males and females adopt the more effective leadership in hotel operations, how does

gender virtue differentiate females from males in the leadership effectiveness? Do these differences render females better leaders than males in hotel operations? Meanwhile, demographic information will be collected in this round: gender, education level, age range, and the length of working period.

Afterwards, responses in the last two rounds will be analyzed on the basis of results in the first round. Consequently, conclusion will be achieved according to the analysis of responses from participants.

IMPLICATIONS

The lack of female senior managers specialized in hotel operations is attracting more and more attention from scholars and the public. By gender virtue, female leaders are more considerate and socially skilled which meets the essential demand of hotel management. This Delphi study aims to reveal that transformational female leaders are more effective than male senior managers in hotel operations. According to this conclusion, researcher attempts to suggest that it is crucial to provide more opportunities and higher expectation for females in senior management positions of hotels, than what the statistics indicated in present. Consequently, the number of females in senior management positions demands an incremental change. Moreover, the statement of no stereotyped concepts for female leaders in the U.S (Beck, 1996) can be questioned due to the findings of this present study.

LIMITATIONS OF THE STUDY

This study focused on female leaders' performance of transformational leadership which has been discussed as the more effective leadership style in hotel operations. However, the other important leadership style in real life, the transactional leadership style, has not been discussed or tested thoroughly in this study. Due to the selection of participants in this Delphi study, the region of this study has been limited to the U.S. Therefore, the findings are not able to be applied to other regions. Moreover, it is designed with a strong focus on a specialized industry, hotel operations, which limited the ability to apply the conclusion to other industries. The last, a qualitative research method, Delphi research method, is adopted, which mainly represented the opinions from the academic professionals, disregarding voices from the industry. To this extend, the conclusion lacks some practical considerations.

REFERENCES

- Anderson, N., Lievens, F., Van Dam, K. & Born, M. (2006). A construct-driven investigation of gender differences in a leadership-role assessment center. *Journal of Applied Psychology, 91* (3), 555-566.
- Appelbaum, S.H., Audet, L., & Miller, J.C. (2003). Gender and leadership? Leadership

- and gender? A Journey through the landscape of theories. *Leadership & Organization Development Journal*, 24 (1), 43 – 51.
- Bass, B.M. (1981). Women and leadership, *Ralph Stogdill's Handbook of Leadership: A Survey of Theory and Research*, Second Edition, Free Press, New York, NY.
- Bass, B.M., & Avolio, B.J. (1990). The implementations of transactional leadership for individual, team, and organizational development. In R.W Woodman & W.A. Pasmore (Eds.), *Research in Organizational Change and Development*, 4. 231-272.
- Beck, J.A. (1996). *Career anchors, organizational commitment, and job plateaus: An analysis of hotel executive operating committee members' career development*. Available from ProQuest Dissertations and Theses database. (AAT No. 9725508)
- Brownell, J. (1994a). Women in hospitality management: general managers' perceptions of factors related to career development. *International Journal of Hospitality Management*, 13, 101-17.
- Brownell, J. (1994b). Personality and career development: A study of gender differences. *Cornell Hotel and Restaurant Administration Quarterly*, 35, 36-45.
- Burke, W.W. (1986). Leadership as empowering other. In S. Srivasta (Ed.), *Executive Power*, 51-77. San Francisco: Jossey Bass.
- Burke, R.J., Koyuncu, M., & Fiksenbaum, L. (2008). Work experiences, satisfactions and psychological well-being of female and male managers in the hospitality sector in Turkey. *Equal Opportunities International*, 27 (6), 505-518.
- Burke, S & Collins, K.M. (2001). Gender differences in leadership styles and management skills. *Women in Management Review*, 16 (5), 244-256.
- Burgess, C. (2003). Gender and salaries in hotel financial management: It's still a man's world. *Women in Management Review*, 18 (1/2), 50 – 59.
- Clark, R.A., Hartline, M. D., & Jones, K. C. (2009). The effects of leadership style on hotel employees commitment to service quality. *Cornell Hospitality Quarterly*, 50 (2), 209-231.
- Eagly, A. H., & Carli, L. L. (2003). The female leadership advantage: An evaluation of the evidence. *Leadership Quarterly*, 14, 807–834.
- Eagly, A. H., & Johannesen-Schmidt, C. M. (2001). The leadership styles of women and men. *Journal of Social Issues*, 57 (4), 781–797.
- Eagly, A. H., Johannesen-Schmidt, M. C., Van Engen, M. L. (2003). Transformational, transactional, and laissez-faire leadership styles: A meta-analysis comparing women and men. *Psychological Bulletin*, 129 (4), 569-591.

- Garavan, T.N., O'Brien, F., & O'Hanlon, D. (2006). Career advancement of hotel managers since graduation: a comparative study. *Personnel Review*, 35, 252-260.
- Guerrier, Y., & Adib, A. (2004). Gendered identities in the work of overseas tour reps. *Gender, Work and Organizations*, 11, 334-50.
- Hersey, P., & Blanchard, K. (1988). *Management of organizational behavior. Utilizing human resources* (5th ed.) Englewood Cliffs, NJ: Prentice-Hall.
- Kay, C., & Russette, J. (2000). Hospitality management competencies, *Cornell Hotel and Restaurant Administration Quarterly* 41 (2), 52–63.
- Kennedy, H.P. (2003). Enhancing Delphi research: Methods and results. *Methodological Issues in Nursing Research*, 45 (4), 504-511.
- Knutson, B.J., & Schmidgall, R.S. (1999). Dimensions of the glass ceiling in the hospitality industry. *The Cornell Hotel and Restaurant Administration Quarterly*, 40, 64-75.
- Lewis, A.E., & Fagenson-Eland, E. A. (1998). The influence of gender and organization level on perceptions of leadership behaviors: A self and supervisor comparison. *Sex Roles*, 39, 479-502.
- Li, L., & Leung, R.W. (2001). Female managers in Asian hotels: Profile and career challenges. *International Journal of Contemporary Hospitality Management*, 13 (4), 189-196.
- Ludking, A. (1999). Hotel general managers: A review of prominent research themes. *International Journal of Tourism Research*, 1, 167-93.
- Maxwell, G.A. (1997). Hotel general management: views from above the glass ceiling. *International Journal of Contemporary Hospitality Management*, 9 (5), 230–235.
- Okoli, C., & Pawlowski, S.D. (2004). The Delphi method as a research tool: an example, design considerations and applications. *Information & Management*, 42, 15–29.
- Patiar, A., & Mia, L. (2009). Transformational leadership style, market competition and departmental performance: Evidence from luxury hotels in Australia. *International Journal of Hospitality Management*, 28 (2), 254-262.
- Rosener, J.B., McAllister, D. & Stephens, G. (1990). *Leadership Study: International Women's Forum*, Graduate School of Management, Irvine, CA.
- Ryan, B., Tavitiyaman, P., & Weerakit, N. (2009). The impact of gender, age and education related to leadership competencies needed for success as a hotel general manager. *International CHRIE Conference-Refereed Track*.
- Skalpe, O. (2007). The CEO gender pay gap in the tourism industry – evidence from

- Norway. *Tourism Management*, 28, 845-53.
- Schein, V.E. (2007). Women in management: reflections and projections. *Women in Management Review*, 22 (1), 6 – 18.
- Sinclair, T. (1997), *Gender, Work and Tourism*. Routledge, London.
- Sparrowe, R.T., & Iverson, K.M. (1999). Cracks in the glass ceiling? An empirical study of gender differences in income in the hospitality industry. *Journal of Hospitality and Tourism Research*, 23, 4-20.
- Sumer, H. C. (2006). Women in management: Still waiting to be full members of the club. *Sex Roles*, 55, 63-72.
- Tracey, B.J. & Hinkin, T.R (1994). Transformational leaders in the hospitality industry. *The Cornell H.R.A. Quarterly*, 35 (2), 18.
- Valentine, S., & Godkin, L. (2000). Supervisor gender, leadership style, and perceived job design. *Women in Management Review*, 15 (3), 117-129.
- Vecchio, R.P. (2002). Leadership and gender advantage. *The Leadership Quarterly*, 13 (6), 643-671.
- Wirth, L. (2001). Breaking the glass ceiling: women in management, *Gender Issues in Labor Statistics* (70-71) International Labor Office, Geneva.
- Woods, R.H., Viehland, D. (2000). Women in hotel management. *Cornell Hotel and Restaurant Administration Quarterly*, 41, 51-54.
- White House Project (2009). Benchmarking Women Leadership.
<http://www.thewhitehouseproject.org/documents/Report.pdf>
- US Dept. of Labor (2011). Labor statistics.
<http://www.dol.gov>

USING VISITOR SURVEYS TO GUIDE MANAGEMENT DECISIONS: DOES QUESTION FORMAT MATTER?

Stacy R. Tomas
Department of Parks, Recreation and Tourism Management
North Carolina State University, USA

and

Linda Oakleaf
Department of Health, Physical Education and Recreation
Benedict College, USA

ABSTRACT

Tourism research and particularly visitor studies are often commissioned by the tourism industry to serve as the information base for effective decision making. Scalar questions (such as Likert-type scale questions) are commonly used in survey research and are frequently formatted or constructed differently to maximize the effectiveness for particular questions (Dillman, 2000). However, previous research has indicated that the manner in which questions are asked can influence how respondents answer survey questions. When attempting to determine tourist preferences, it is common practice to frame survey questions in either check-all or forced-choice formats, assuming these two formats yield similar results (Rasinski, et al., 1994). However, recent research has suggested that the response task in the two formats is different and could yield different results (Smyth, et al., 2008) due to the influence of “satisficing” and context effects. Thus, does the manner in which survey questions are formatted matter? Could the same question asked two different ways yield different results? The goal of this presentation is to highlight findings from a recent visitor study in which visitor preferences were assessed using two different survey question formats, in an effort to encourage respondents to fully process all options. The findings yielded different results, suggesting the respondents interpreted and answered the questions differently. Thus the findings suggest the utility of using a dual question format to more fully assess visitor preferences.

KEYWORDS: Context Effects, Elaboration Likelihood Model, Question Format, Satisficing, Visitor Surveys

INTRODUCTION

A large zoological park in the southeastern United States is one of the largest tourist attractions in the state, hosting over 755,500 visitors in 2010. While this zoo is a major tourism attraction, the zoo has not conducted formal research about its visitors since 1995 due to limited budgetary funds dedicated to visitor research. Unfortunately this is reflective of a national trend. Zoos have received relatively little attention in the

leisure/tourism literature despite the large numbers of annual visitors (Turley, 2001). Mason (2000) noted that zoos “appear remarkably under-researched” (p. 335).

Despite the lack of visitor research, the zoo has been committed to providing quality experiences for its visitors, as evidenced by significant capital improvements to exhibits and learning opportunities over the past 20 years. However, the zoo has been unable to evaluate whether these improvements have led to enhanced visitor experiences or to assess what additional services or amenities visitors would most appreciate. This lack of formal research and knowledge about the zoo’s visitors is problematic because proper planning is dependent upon research. Tourism research provides the information base for effective decision making (Goeldner and Ritchie, 2006). Without a strong understanding of visitors and their preferences, the zoo has limited information to make sound managerial decisions on where and how to utilize limited budgetary funds.

In 2010, the zoo sought to conduct the first visitor study in over 15 years to assess visitors’ preferences for new amenities and services. Zoo management had a list of nine items it was considering implementing; however, with a dwindling budget, the zoo recognized it was unable to implement all of the suggested amenities and services. As such, zoo management was interested in seeking input from its visitors as to which amenities and services would be most preferred and would, in turn, encourage increased visitation. The goal was to use the results of the visitor study to guide future management decisions. However, if visitors rated all nine items highly, or indicated that all items would equally motivate them to return to the zoo, the results would not provide useful managerial input. As such, the following questions arose: “How do we construct survey items to obtain the most useful visitor response?”

Petty and Cacioppo (1979) introduced the Elaboration Likelihood Model (ELM) to explain how attitudes are formed and how information is processed. The model proposes an “elaboration continuum”, ranging from low elaboration or low thought, to high elaboration or high thought. Petty and Cacioppo (1986) argue there are two routes to persuasion. The central route consists of thoughtful consideration of all ideas and arguments of a message and the receiver (listener) of the message is an active participant in the process. The peripheral route consists of less elaboration and cognitive processing and the receiver of the message may lack the ability or motivation to think about each aspect of the message individually. Thus, the more involved the receiver is in the message, the more motivation the receiver will have to think about and process the message (Petty & Cacioppo, 1979). When asking survey respondents to rate their preferences for certain features (compared to other features), it is necessary for them to engage in central route processing.

Scalar questions (such as Likert-type scale questions) are commonly used in survey research and are frequently formatted or constructed differently to maximize the effectiveness for particular questions (Dillman, 2000). Previous research indicated that the manner in which questions are asked can influence how respondents answer survey questions (de Leeuw, 1992). Several studies have examined differences in responses between “check-all” (check all that apply) and “forced-choice” (yes/no) question formats

(Krosnick, 1999; Rasinski, Mingay & Bradburn, 1994; Smyth, Dillman, Christian & Stern, 2006; and Smyth, Dillman & Christian, 2008).

It has become common practice to assume that check-all and forced-choice question formats yield similar results (Rasinski, et al., 1994). However, research has suggested that the response task in the two formats was fundamentally different. Krosnick (1999) argued that the check-all format may encourage respondents to avoid expending the time and effort necessary to optimally answer the question, a strategy known as “satisficing”. Satisficing refers to a decision-making strategy that attempts to meet the criteria for adequacy, rather than to identify an optimal solution. In contrast, a forced-choice question requires respondents to commit to an answer for every item, encouraging them to elaborate more deeply on every option (Krosnick, 1999). Smyth, et al. (2006) found that the forced-choice question format did indeed encourage deeper processing of all response options, and was preferable to the check-all format, which encouraged satisficing. Furthermore, Smyth, et al. (2008) found that context effects can influence responses, meaning that prior questions can influence responses to subsequent questions. They argued that the order in which questions were presented would affect how respondents interpreted and answered subsequent questions.

Thus, the goal of this research project was to determine which of the nine amenities and services would be most preferred by zoo visitors and encourage increased visitation by presenting the question in a manner that would encourage respondents to fully process all options, avoiding satisficing and taking into account context effects.

METHODS

The nine items of interest were included on a two-page visitor survey that was administered to zoo visitors (October 2010-October 2011). A modified probability sample was employed which utilized a systematic quota sampling plan where every *n*th adult individual (determined by traffic flow and number of interviewers) was approached during their visit and asked to complete the questionnaire. Visitors were approached mid-visit, before entering the food and drink concessions area. In exchange for a completed survey, respondents were given a food/drink voucher to be used in the concessions area. A total of 845 usable surveys were collected, yielding a response rate of 84.5%.

In order to assess visitors’ preferences for these nine items, respondents were asked to answer two questions. First, respondents were asked to rate the items on a 7-point Likert-type scale (ranging from ‘not at all likely’ to ‘very likely’). The following verbiage was used: *“The zoo is interested in exploring opportunities to enhance your experience and encourage repeat visitation. Below are a number of different features the zoo is considering. How likely are you TO VISIT THE ZOO MORE OFTEN if each of these items were implemented at the zoo?”* Second, after responding to each item in the question listed above, participants were then asked to refer back to the list of nine items and indicate their top two choices: *“On the list above, please indicate your 2 most preferred choices (please circle 2).”*

Thus, the question was worded in two different ways to help refine the specificity of the question: (1) respondents were presented a forced-choice question to help diminish satisficing, meaning respondents had to address each option individually; and (2) respondents were asked to refer back to the list and choose their top preferences to help take into account context effect, meaning that respondents had reviewed all possible options before indicating the most important items.

RESULTS AND DISCUSSION

Preliminary results indicate differences in responses to the two questions (Tables 1 and 2). Additionally, the two questions allow responses to be examined differently. While the top two choices are the same for each question, their order is switched between the two questions. When asked to rate each item on based on the Likert-type scale, “more animal interaction” had the highest mean response (Table 1). However, when respondents were asked to rate their top choices from the Likert-item list, “new animals” had the most responses (Table 2).

Table 1. Responses Listed in Rank Order Based on Likert-Item Question

Rank	Item	Mean Response	Standard Deviation	Frequency
1	More animal interaction	5.99	1.178	842
2	New animals	5.98	1.160	845
3	Special temporary exhibits	5.57	1.341	821
4	Extended weekend summer Zoo hours	5.26	1.606	837
5	Children’s train ride	4.77	1.950	825
6	More staff interaction	4.63	1.390	838
7	Increased tram service	4.55	1.506	836
8	Guided Zoo tours	4.43	1.700	838
9	Added staff	4.28	1.472	832

Table 2. Responses Listed in Rank Order Based on Top Two Choices

Rank	Item	Percent	Frequency
1	New animals	33.4%	548
2	More animal interaction	28.0%	459
3	Children’s train ride	11.9%	196
4	Special temporary exhibits	10.5%	173
5	Guided Zoo tours	6.0%	98
6	Extended weekend summer Zoo hours	5.8%	96
7	Increased tram service	2.1%	35
8	More staff interaction	1.8%	29
9	Added staff	0.5%	8

Additionally, when asked to respond using the Likert-item scales, mean responses between the highest and lowest ranked items only ranged from 5.99 to 4.28 (Table 1). This does not indicate great variability among responses. However, when asked to review the list of items and indicate their top two choices, the frequency between the highest and lowest choices varied between n=548 and n=8 (Table 2), thus indicating greater variability among responses. Table 3 provides a comparison of the rank order of the items from the two different question formats.

Table 3. Comparison of Rank Order Based on Question Format

Item	Top Two Choices	Likert-Item Question
New animals	1	2
More animal interaction	2	1
Children's train ride	3	5
Special temporary exhibits	4	3
Guided Zoo tours	5	8
Extended weekend summer Zoo hours	6	4
Increased tram service	7	7
More staff interaction	8	6
Added staff	9	9

Based on these preliminary results, if the zoo management were to only choose one item to focus future budgetary dollars and managerial efforts on, their choice would differ depending upon which question they referred to. Thus, preliminary findings of this study indicate that the way in which a question is asked can influence different responses. These findings suggest that using both questions together as opposed to asking the question only one way provides increased insight into respondents' true preferences. By asking respondents to first rate each item individually, they are given the opportunity to process each option separately, allowing for a higher level of central route processing. Then, by asking them to choose their top preferences in the context of all available options, they are able to more fully consider the options in relation to each other. Thus, the utility of using both items together is that respondents have spent the time to consider each option individually, thus making their subsequent rank order more meaningful. Additionally, the increased variability in responses to the rank order question allows tourism managers to understand what amenities are the most important for their visitors.

REFERENCES

- Cacioppo, J.T. & Petty, R.E. (1979). Effects of message repetition and position on cognitive response, recall and persuasion. *Journal of Personality and Social Psychology*, 27, 97-109.
- Petty, R. E., & Cacioppo, J. T. (1986). *Communication and Persuasion: Central and Peripheral Routes to Attitude Change*. New York: Springer-Verlag.
- de Leeuw, E. D. (1992). *Data quality in mail, telephone, and face to face surveys*. Amsterdam: TT Publications.
- Dillman, D. A. (2000). *Mail and internet surveys: The tailored design method* (2nd ed.). New York: NY: John Wiley & Sons.
- Goeldner, C., & Ritchie, J. (2006). *Tourism: Principles, practices, philosophies* (10th ed.). New York: John Wiley & Sons.
- Krosnick, J. A. (1999). Survey Research. *Annual Review of Psychology*, 50, 537-67.
- Mason, P. (2000). Zoo tourism: The need for more research. *Journal of Sustainable Tourism*, 8(4), 333-339.
- Rasinski, K. A., Mingay, D., & Bradburn, N. (1994). Do respondents really 'mark all that apply' on self-administered questions? *Public Opinion Quarterly*, 58, 400-408.
- Smyth, J. D., Dillman, D. A., Christian, L. M., & Stern, M. J. (2006). Comparing check-all and forced-choice question formats in web surveys: The role of satisficing, depth of processing, and acquiescence in explaining differences. Social and Economic Sciences Research Center Technical Report, Washington State University. Available online at <http://www.sesrc.wsu.edu/dillman/papers.htm> (accessed May 12, 2011).
- Smyth, J. D., Dillman, D. A., & Christian, L. M. (2008). Context Effects in Internet Surveys: New Issues and Evidence. Social and Economic Sciences Research Center Technical Report, Washington State University. Available online at <http://www.sesrc.wsu.edu/dillman/papers.htm> (accessed May 12, 2011).
- Turley, S. K. (2001). Children and the demand for recreational experiences: The case of zoos. *Leisure Studies*, 20(1), 1-18.

INVESTIGATING THE CAREER PROFILE OF AUSTRALIAN CELLAR DOOR EMPLOYEES – Working paper

Kim M. Williams
School of Management
La Trobe University, Australia

ABSTRACT

This is an exploratory study concerning the career profile of cellar door personnel working in a regional wine district in Australia. The project investigated career aspiration, employee mobility, and the perceived skills and knowledge essential for a cellar door representative. The investigation concentrated on a case study context of cellar door employees currently employed in the Yarra Valley, Victoria. The study was conducted utilising self administered surveys. The study findings provide an insight into career direction in this sector and may assist in improving the long term training strategies employed by the regional wine tourism industry. A richer understanding of the complexity associated with attracting, retaining and training quality employees in this sector may assist in developing professional career pathway for Australian wine tourism personnel.

KEYWORDS: Career development; Wine tourism; Cellar door; Professional development

INTRODUCTION

Wine tourism in Australia is a contemporary phenomenon. In recent years wine and tourism has been linked by the development of wine trails in numerous regional areas (Bruwer, 2003). The linkage between wine and tourism has offered the tourist a wine related experience and also the opportunity to purchase and taste wine produced at the source.

The purpose of this research was to determine the career profile of cellar door personnel. The research utilised a case study of employees working in the Yarra Valley wine region located in Victoria, Australia. The wine industry in Australia has grown considerably in recent years and contributes more than \$2.7 billion to Australia's export market (Australian Government Department of Agriculture, Fisheries and Forestry, 2005-06). Countless wineries across Australia have invested substantially into augmented facilities, such as; visitor centres, food and beverage outlets, cellar door and merchandising. With this investment in infrastructure also comes a required investment in human capital. It is essential to attract, retain and train quality employees to maximise their and the wineries sales potential.

LITERATURE REVIEW

The cellar door is an essential component in the wine tourism experience of visitors (O'Neill and Charters, 2000). Cellar door personnel enhance the visitors overall assessment of the winery and their products. Sales and marketing at the cellar door could be considered vital for the overall success of a winery. Recruiting and retaining quality cellar door staff is critical to this success. By engaging the customer in wine related dialogue and educating them about the products available at the winery, the cellar door employees are able to build a relationship with the potential customer and increase the possibility of both cellar door sales and future purchases of the wineries products (Charters, Clark-Murphy, Davis, Brown, and

Walker, 2008; Firstenfeld, 2007; Getz, 2000; Walker, 2002). Cellar door staff who are knowledgeable, are able to be responsive, offer personal attention and hospitality while providing an educational experience, are a key component of a successful wine tourism business (Charters, Fountain and Fish, 2009; Mitchell, 2004; Roberts and Sparks, 2006; Walker, 2002).

Casualisation is a significant feature of the Australian labour market (Lewis, 2008). As with other sectors of the tourism and hospitality industry, wineries employ a substantially mobile labor force, which consists of casual and part time workers (Winemakers' Federation of Australia, n.d.). This approach to employment tenure is often coupled with a limited provision of accurate position descriptions, detailing the duties and responsibilities of a cellar door employee. The hospitality industry is typified by challenges in recruitment, retention, under-staffing and regular turnover of staff (Baum 2002; Brien, 2004; Choi, Woods and Murrmann, 2000; Gustafson, 2002; Poulston, 2008; Jameson, 2000). These challenges and the lack accurate employment criteria are also present in the wine tourism sector. Locating the right people to provide the public face of the winery can be an arduous task, especially for regional wineries which are located in areas where the labour force of potential employees is difficult to obtain. Remuneration is still considerably low compared to other comparable industries, thus these and other factors could provide limited incentive for employees to develop a career path at the cellar door.

In 2002 a wine tourism business plan compiled by the Winemakers' Federation of Australia was released, the *Wine Tourism Strategic Business Plan 2002-2005 Embrace the Challenge*. The business plan indicated the importance of winemakers and their employees possessing specific skills and knowledge to be able to effectively operate a tourism business. The skills required by the cellar door personnel are often tourism and customer service related rather than wine production related. Equally, knowledge of the wine product and the ability to discuss wine-related topics to the potential consumer will enhance the visitors experience at the winery.

In 2003 the Australian National Training Authority (ANTA) released a paper called *Career Paths and Training for Wine Tourism*. A number of training issues were identified. There is a need for both the wine and tourism industries to realize the benefits of training and build a training culture for wine tourism sector. There are associated challenges when operating a small business in a regional area such as; distance, seasonal work, lack of staff, lack of access to training information. In addition to this there is a need to market wine tourism as a career path and thus encourage students to consider future employment in this sector.

Wine Australia released a report *Directions to 2025: An Industry Strategy for Sustainable Success* in 2007, which clarified the global environment in which Australia is making and trading its wine. The report suggested the developmental strategy of using tools and resources to improve wine tourism business practices, such as using the Winemakers' Federation of Australia cellar door benchmarking program and the Wine Tourism Toolkit. Through utilizing the resource developed by the Winemakers' Federation of Australia, the industry peak body, regional wineries are able to promote their cellar door experience and create opportunity for direct sales, thus accessing an extremely successful route to the potential consumer.

The implication and value of training and professional development of employees has been examined by many researchers (see, for example, Baum, 2002; Becton and Graetz, 2001; Hjalager and Andersen, 2001; Huang, 2001; Poulston, 2008; Yang and Cherry, 2008). The success of a wine tourism operation is dependent on personnel obtaining training on how to provide exceptional customer service and how to develop a strong relationship with the potential customer by enlighten the wine tourist about the merit of their products and the region (Charters and O'Neill, 2001; Dodds, 1995; Griffin and Loersch, 2006; Macintosh, Lockshin and Spawton, 1998). A winery may be able to obtain a competitive edge at the cellar door and improve the bottom line of their retail sales by incorporating strategic cellar door training and development programs in their overall human resource function, especially if the focus is on improving existing employees' skills and knowledge and not just inducting those newly employed with the organisation.

RESEARCH QUESTIONS

Considerable research has been conducted into wine tourism, however currently there is limited academic research documenting the career development of wine tourism personnel working at the cellar door. Careers in tourism are a fairly recent occurrence (Ayres, 2006). Career development, the investigation of a person's career over time can assist in understanding career patterns, trends and changes in the labour supply (Riley, Ladkin, and Szivas, 2002). This study addresses knowledge gaps in the literature relating to career profiles of employee working at the cellar door in a specific wine region in Australia, the Yarra Valley.

The research questions which guided this study are:

- ❖ To determine the career ambition or career aspiration of employees working at the cellar door;
- ❖ To examine the career mobility and employment relationship of employees working at the cellar door; and,
- ❖ To ascertain what are the essential the perceived skills and knowledge required by a cellar door representative.

METHODS

A case study context, the Yarra Valley, was employed to gather preliminary data concerning career profiles in the wine tourism sector. The study utilise quantitative data techniques requiring participants to complete a self administered questionnaire. The researcher contacted the cellar door manager, prior to a visit to the Yarra Valley, to ascertain if the winery employees could be asked to participate in the research study. The researcher visited approximately twenty-two wineries in the region and distributed approximately 120 questionnaires and participant's information sheet which explained the project and their involvement. The management distributed the questionnaire to the cellar door personnel and respondents were able to return the questionnaire via a reply-paid envelop. The questionnaire had no identifying marks thus respondents were able to remain anonymous. From the 120 questionnaires distributed a total of 40 usable surveys were returned, 55% Female and 45% male. A response rate of 33% was obtained which is deemed as a sufficient size for research purpose (Cohen and Manion, 1994).

This study includes a number of inherent limitations. The sample was drawn from one wine region in Australia making the sample size small, however the study will be conducted in a number of other wine regions in Australia over the next two year and this will provide sufficient data for a comparative data analysis in the future.

FINDINGS AND DISCUSSION

The results from the study respondents indicated a spread of age ranges of employees working at the cellar door with 20% between 18- 24, 17.5% between 25-30 and 31-39 respectively, 23% between 40-49 and 22.5% over 50. Ninety-five percent of the respondents had completed secondary school and a further 55% had continued onto a tertiary education. In relation to the winery and the employees' residential address 77.5 % lived less than 30 minutes away with 7.5% walking distance and 20% only having to make a ten minute drive.

Of the respondents only 13% were related to the owner of the winery, however 67% were a friend of the owner prior to commencing their employment. This result could possibly indicate some of the challenges of recruiting in the hospitality sector especially in a regional area, thus the recruitment of friends is fairly high to compensate for a small pool of potential employees (Baum 2002).

Of the respondents 40% were employed full-time 33% part-time and 27% casual. This result concurs with the expectation that a large percentage (60%) of the cellar door labour force is casual (Lewis, 2008). Encouragingly, 60% of the respondents view their current position at the cellar door as part of their career path and 53% perceived there were promotional opportunities with their current employer. The findings reveal that 57.5% of respondents had worked with their current employer for over 2 years, with 30% of these for over 5 years. This indicates a fairly stable labour force where turnover may be not as high as expected (Gustafson, 2002).

Of the respondents 62.5% had attended a professional development or training activity in the last 6 months. This finding suggests that employers are taking staff training requirements seriously. In addition the employer is willing to provide training to both full-time and casual employees and only 12.5% of respondent had never received any training with their current employer (O'Neill and Charters, 2000).

When asked to rank the importance of different skills and knowledge required by a cellar door representative on a 5 point Likert scale 95% of respondents strongly agreed with the need to be friendly, 85% strongly agreed with being able to engage the customer in conversation, 80% strongly agreed with being able to communicate easily with others, while a lower percentage of 67% strongly agreed with being able to sell. These findings agree with the research finding of Dodds (1995). Thus, it could be suggested that these skills would ideally be incorporated into cellar door professional development activities.

CONCLUSION

This research is a preliminary study for a larger project which will be developed in conjunction with the Wine Makers Federation of Australia, the peak

industry body. The larger project will endeavour to determine the career profile of cellar door employees across a number of wine regions in Australia. The findings from an expanded could provide a direction to regional wine regions on the benefits of developing long term training strategies as a means of producing a regional labour pool. This knowledge could equip the wine tourism industry with a better understanding of career development and consequently enhanced professionalism.

REFERENCES

- Australian Government: Department of Agriculture Fisheries and Forestry (2005-06). Australian Wine Industry Fact Sheet. Available from: <http://www.daff.gov.au/agriculture-food/hort-wine/wine-policy/industry-fact-sheet>
- Australian National Training Authority (2003). *Career paths and training in wine tourism. A guide to increase training for wine tourism in Australia – for employers, training providers and employees*. Brisbane: Australian National Training Authority.
- Ayres, H. (2006). Education and opportunities as influences on career development: findings from a preliminary study in eastern Australian tourism. *Journal of Hospitality, Leisure, Sport and Tourism Education*, 5(1), 16-27.
- Baum, T. (2002). Skills and training for the hospitality sector: a review of issues. *Journal of Vocational Education and Training*, 54(3), 343-364.
- Becton, S., & Graetz, B. (2001). Small business-small minded? Training attitudes and needs of the tourism and hospitality industry. *International Journal of Tourism Research*, 3(2), 105-113.
- Brien, A. (2004). The New Zealand hotel industry- vacancies increased while applicant numbers and caliber decreased. *International Journal of Hospitality and Tourism Administration*, 5(1), 87-104.
- Bruwer, J. (2003). South African wine routes: some perspectives on the wine tourism industry's structural dimensions and wine tourism product. *Tourism Management*, 24(4), 423-435
- Charters, S., Clark-Murphy, M., Davis, N., Brown, A., & Walker, E. (2008). An exploration of managerial expertise in the Western Australian wine industry. *International Journal of Wine Business Research*, 20(2), 138-147.
- Charters, S., Fountain, J., & Fish, N. (2009). "You felt like lingering...": experiencing "real" service at the winery tasting room. *Journal of Travel Research*, 48(1), 122-134.
- Charters, S., & O'Neill, M. (2001). Service quality at cellar door: a comparison between regions. *International Journal of Wine Making*, 13(3), 7-17.
- Choi, J., Woods, R. H., & Murrmann, S. K. (2000). International labor markets and the migration of labor forces as an alternative solution for labor shortages in the hospitality industry. *International Journal of Contemporary Hospitality Management*, 12(1), 61-66.
- Cohen, L. & Manion, L (1994). *Research Methods in Education*, New York: Routledge.
- Dodds, T. (1995). Opportunities and pitfalls of tourism in a developing wine industry, *International Journal of Wine Marketing* 7(1), 5-16.
- Firstenfeld, J. (2007). Training the front line troops: three pros recommend how to improve tasting room sales. *Wines & Vines*, 88(5), 62-66.
- Getz, D. (2000). *Explore wine tourism: management, development & destinations*. New York: Cognizant.
- Griffin, T., & Loersch, A. (2006). The determinants of quality experiences in an emerging wine region. In Carlsen, J., & Charters, S. (Eds.). *Global Wine Tourism: Research, Management and Marketing*, (pp. 80-91). Wallingford, UK: CABI International.
- Gustafson, C. M. (2002). Employee turnover: a study of private clubs in the USA. *International Journal of Contemporary Hospitality Management*, 14(3), 106-113.

- Hjalager, A., & Andersen, S. (2001). Tourism employment: contingent work or professional career? *Employee Relations*, 23(2), 115-129.
- Huang, T. (2001). The relation of training practices and organizational performance in small and medium size enterprises. *Education + Training*, 43(8/9), 437-444.
- Jameson, S. M. (2000). Recruitment and training in small firms, *Journal of European Industrial Training*, 24(1), 43-9.
- Lewis, P. (2008). *The labour market, skills demand and skills formation*. Canberra: The Academy of the Social Sciences in Australia.
- Macintosh, G., Lockshin, L., & Spawton, T. (1998). The effects of salesperson/consumer relationships in wine retailing. *International wine marketing study guide*. Adelaide: School of Marketing, University of South Australia.
- Mitchell, R. (2004). *Scenery and Chardonnay: An Exploration of the New Zealand Winery Visitor Experience*. PhD. Diss., University of Otago, Dunedin, New Zealand.
- O'Neill, M., Charters, S. (2000). Service quality at the cellar door: implications for Western Australia's developing wine tourism industry. *Managing Service Quality*. 10(2), 112-122.
- Poulston, J. (2008). Hospitality workplace problems and poor training: a close relationship. *International Journal of Contemporary Hospitality Management*, 20(4), 412-427.
- Riley, M., Ladkin, A., & Szivas, E. (2002). *Tourism Employment: Analysis and Planning*. Clevedon: Channel View Publications.
- Roberts, L., & Sparks, B. (2006). Enhancing the wine tourism experience: the customers' viewpoint. In Carlsen, J., & Charters, S. (Eds.). *Global Wine Tourism Research Management and Marketing*, (pp.47-66). Wallingford, UK: CABI International.
- Walker, L. (2002). Tasting room survey: selling at the cellar door, *Wines & Vines* 83(11), 34-38.
- Wine Australia (2007). *Directions to 2025: An Industry Strategy for Sustainable Success*, Adelaide, South Australia: Winemakers' Federation of Australia.
- Winemakers' Federation of Australia (WFA) (2002). *Wine Tourism Strategic Business Plan 2002-2005 Embrace the Challenge*, Adelaide, South Australia: Winemakers' Federation of Australia.
- Winemakers' Federation of Australia (WFA) (n.d.). *Wine tourism uncorked... A guide to making wine tourism work for you*, Adelaide, South Australia: Winemakers' Federation of Australia.
- Yang, H., & Cherry, N. (2008). Human resource management challenges in the hotel industry in Taiwan. *Asia Pacific Journal of Tourism Research*, 13(4), 401-410.

USING ONLINE MARKETING AS A CUSTOMER RELATIONSHIP MANAGEMENT
STRATEGY TO INCREASE CUSTOMER RETENTION AND CUSTOMER SHARE
DEVELOPMENT: AN INVESTIGATION AMONG TOURISM BUSINESSES

Wei Wang

Department of Recreation, Park, and Tourism Studies
Indiana University, USA

Shu Cole

Department of Recreation, Park, and Tourism Studies
Indiana University, USA

ABSTRACT

The purpose of this study is to understand the effects of online marketing on customer retention and customer share development in tourism businesses. It also aims to examine if the effects of online marketing on customer retention and customer share is different from other customer relationship management strategies. Four hypotheses were proposed in this study. Research methods and contributions of the study are also discussed.

KEYWORDS: Customer Relationship Management; Online Marketing; Customer Retention; Customer Share; Tourism Marketing.

INTRODUCTION

Customer Relationship Management (CRM) has been largely adopted to improve customer satisfaction and loyalty, enhance repetitive purchasing, and create better word-of-mouth communication (Kumar and Denish, 2004). While direct marketing could be expensive and time-consuming, many travel agencies and airlines currently utilize the power of online booking systems to accelerate the speed of reservation with reduced cost.

Yet, the impacts of online marketing to retain customers stay unfolded. Previous studies addressed the importance of emphasizing traditional marketing strategies, such as direct mailings and loyalty programs (Verhoef, 2003). However, the process of customer relationship management is generally costly and time-consuming. Furthermore, the effectiveness of online marketing should be investigated on customer share. Therefore, the purpose of this study is, firstly, to understand the effect of online marketing on customer retention and customer share development in tourism businesses; and secondly to examine if the effects of online marketing on customer retention and customer share is different from other CRM strategies, such as loyalty programs and direct mailings.

BACKGROUNDS

The primary purpose of CRM was to focus on closer and deeper relationships with customers. Firms and businesses should be willing and able to change their behavior toward an individual customer based on their needs to increase customer-perceived value and customer satisfaction (Pepper, Roger, and Dorf, 1999; Armstrong & Kolter, 2010). The central customer

relationship management aims to acquire more profitable new customers and retain existing customers by meeting their expectations.

Previous literature suggests that customer retention rates and customer share are two important metrics in CRM (Reichheld, 1996). First, it is widely accepted that retained customers are more profitable as it costs much less for a firm to keep existing customers than to attract a new customer (Barn, 1997). Reinartz, Thomas, and Kumar (2005) posit that firms should give more emphasis to interpersonal and interactive communications than to acquiring new customers. Certain firms manage customer exit especially for profitable customers using loyalty program. Second, customer share is another indicator for CRM. It is defined as the ratio of a customer's purchases of a particular category of services from supplier A to the customer's total purchases of that category of services from all suppliers (Peppers and Rogers, 1999). To increase customer share, many travel agencies integrate a variety of marketing communication and promotion methods such as advertising and public relationship managements to increase awareness and promote their tour packages (Best, 2005).

Online marketing has become an alternative way for a firm to retain customers by obtaining their feedback. According to a study conducted by Aarsal, Backman, and Baldwin (2008), experienced travelers were more influential in accommodation and transportation recommendations, as well as information provided by destinations or advice. Travel agencies should know customer needs through the Internet and design tour packages and tailor personalized services to match customer's expectations. In addition, tourism businesses should pay close attention to moderate how words circulate so that they could utilize the feedback from customers as precautions to prevent unfavorable outcomes (Rosen 2002). Therefore, it is hypothesized that online marketing positively affects customer retention (H1).

Tourism businesses are also trying to use cost-efficient marketing strategies such as social networks to catch consumer attention and increase customer share. Online marketing affects brand awareness, perceptions, preferences, and choices (Zeithaml, Bitner, and Gremler, 1996; Brown and Reingen, 1987). People look for information and advice from other travelers and provide their own experiences after the completion of the trip. In fact, many travelers have existing needs for certain service features and destination alternatives. Online marketing becomes especially crucial and plays critical roles in final decision making. Therefore, it is hypothesized that online marketing positively affect customer share over time (H2).

The effectiveness of online marketing will be evaluated in comparison with loyalty program and direct mailings. Loyalty programs provide relative attractiveness to customers by its economic benefits, emotional benefits, prestige recognition, and access to an exclusive service (Gruen, 1994; Yi and Jeon, 2003; Wirtz, Mattila, and Oo Lwin, 2007). In tourism industry, many travel agencies offer business travelers who spend much time on traveling with accumulated points for family travel during their times off. Second, certain switching costs are usually associated with reward programs which provide barriers to customers switching to another travel agency (Wirtz *et al.*, 2007). Therefore, it is hypothesized that loyalty programs positively affect customer retention (H3a) and customer share development (H3b).

The instrument of using direct mailings is another approach to increase the number of products purchased by customers. Direct mailings characterize with some unique features: firstly, different from general marketing, direct mailings communicate with customers in a direct and personalized way (Roberts and Berger, 1999). Customers with travel needs could be attracted by direct mailings and lead to a potential purchase. Second, the short-term promotions offered by direct mailings may trigger customers to purchase additional services and therefore increase

customer share (Verhoef, 2003). Travelers may be attracted by the air ticket sale and purchase additional services such as hotel rooms and concert tickets for other trip related services. Therefore, it is hypothesized that direct mailings positively affects customer share development over time (H4).

Several covariates should be considered for customer and travel company's characteristics. From the firm's perspective, *relationship age* at initial evaluation could influence greatly on customer retention and customer share (Verhoef, 2003). Customers are more easily to switch to a competitor company at earlier stage due to the low switching cost. From consumer perspective, consumers who have higher *affective commitment* on a travel company and higher *satisfaction* toward the services tend to be responsive to CRM strategies, while others not (Bhattacharya, Rao, and Glynn, 1995). The information shown on internet may not always represent the most appropriate of actual purchases and experiences from all existing customers.

METHOD

Survey data will be collected through convenient sampling from college students who enroll in a Midwestern state in fall semester of 2011. Courses will be selected based on course instructors' willingness to participate in the study. Two questionnaires will be developed to collect information to evaluate the differences between online marketing and other marketing strategies on customer retention and customer share. Each participant will be given a gift card upon the completion of the entire survey as an incentive.

The first survey will be collected before Thanksgiving, 2011. The first survey will solicit information on participants' previous travel behaviors, satisfaction toward the services and experiences, the numbers and types of travel products purchased, age of relationship with their primary travel agencies, commitment with service company, and demographic information. Previous travel behavior incorporates questions such as frequency of travel, the average travel expenditure, and travel companions. Satisfaction toward the services and experiences will be measured on a 7-point scale; 1 = "Strongly Disagree" and 7 = "Strongly Agree." Satisfaction will be measured on variables such as the awareness of the company, willingness to know more about the company, the service quality, the responsiveness to company, the relationship with the company, and the likelihood of recommendation. Commitment will be measured by the variables, such as loyalty, attachment, and belonging to the company. Other items will be measured by self-reported categorical or continuous variables. After completing the survey, participants will receive a thank you letter which reminds them the date of the second survey.

Same participants will be asked to complete the second questionnaire at the end of March in 2012. There are two rationales for choosing the 4-month time period. First, participants will still be able to recall the purpose of the study and more likely to participate in the second survey. Second, participants have multiple opportunities to travel during this period such as Thanksgiving, Christmas, New Year, and Spring Break. Customer retention is identified by asking questions if participants use the same information source to make travel decisions. The researcher will use the information collected in the first survey on participants' past behavior and the primary information sources (online marketing, loyalty program, or direct mailing) to predict their future behaviors on continuous purchases with previous tourism business. The customer share will be calculated as the ratio of a participant's purchases using online marketing to the total purchases of tourism products using all kinds of information sources during the 4-month period. The researcher will be able to know if the customer report similar number of purchases of tourism products using online marketing.

APPLICABILITY OF RESULTS

The purpose of the study is to get a better understanding of the effect of online marketing on customer retention and customer share development over time in tour companies. The researcher also intends to compare the different effects between online marketing strategy and traditional CRM strategies in tourism industry. First, the value of online marketing should be emphasized not only as a method to acquire new customers, but an essential way to retain the existing customers and increase customer shares. With the increasing use of internet, many travelers make online reservations for business trips and vacations. The results will contribute in the value of online marketing efforts in comparison with other marketing strategies on costs and benefits. The results could be seen as an approach to maintain good communications between tourism firms and customers.

Second, this study has the potential to provide implications for effective management of customer relationships. Different from economic promotions (loyalty programs and direct mailings), online marketing utilizes social bonds (friendship and trust) as an incentive tool to create close ties with customers. If tourism firms strive to maximize the long-term customer retention and customer share, positive effects of social-based relationships could result in larger economic returns (repeated purchases and additional purchases). Social-based relationships have higher potential to increase the value propositions of travel products. Travelers may purchase the core and additional products provided by travel agencies while raising emotional feelings by other people's experiences.

Last, the researcher predicts that the study has a potential to demonstrate the advantage and effectiveness of online marketing strategy. However, cautions should be exercised in the interpretation of findings and the integration of multiple marketing strategies is still recommended in operations to achieve greater success.

REFERENCES

- Arsal, I., Backman, S., & Baldwin, E. (2008). Influence of an online travel community on travel decision. *Information and Communication Technologies in Tourism, 3*, 82-93.
- Armstrong, G. & Kotler, P. (2010). *Marketing: An introduction* (10th edition): Prentice-Hall Englewood Cliffs.
- Barns, J. G. (1997). Closeness, strength, and satisfaction: Examining the nature of relationships between providers of financial services and their retail customers. *Psychology and Marketing, 14*(8), 765-790.
- Best, R. J. (2005). *Market-based management*. New Jersey: Pearson Prentice Hall.
- Bhattacharya, C. B., Rao, H., & Glynn, M. A. (1995). Understanding the bond of identification: An investigation of its correlates among art museum members. *The Journal of Marketing, 59*(4), 46-57.
- Gruen, T. W. (1994). Exploring consumer behavior with respect to membership. *Asia Pacific Advances in Consumer Research, 1*, 265-272.
- King, D. (2010). Impact of Internet on travelers' decisions continues to grow. Retrieved March 31st, 2011, from <http://www.travelweekly.com/Travel-News/Online-Travel/Impact-of-Internet-on-travelers%E2%80%99-decisions-continues-to-grow/>.
- Kumar, V., & Shah, D. (2004). Building and sustaining profitable customer loyalty for the 21st century. *Journal of Retailing, 80*(4), 317-329.
- Peppers, D., Rogers, M., & Dorf, B. (1999). Is your company ready for one-to-one marketing. *Harvard Business Review, 77*(1), 151-160.
- Reichheld, F. F., Teal, T., & Smith, D. K. (1996). *The loyal effect*. Boston, MA: Harvard Business School Press.
- Reinartz, W., Thomas, J. S., & Kumar, V. (2005). Balancing acquisition and retention resources to maximize customer profitability. *Journal of Marketing, 69*(1), 63-79.
- Ridings, C. M., & Gefen, D. (2004). Virtual community attraction: Why people hang out online. *Journal of Computer Mediated Communication, 10*(1), 00-00.
- Rosen, E. (2002). *The anatomy of buzz: How to create word-of-mouth marketing*. Crown Business.
- Verhoef, P. C. (2003) Understanding the effect of customer relationship management efforts on customer retention and customer share development. *The Journal of Marketing 67*(4), 30-45.
- Wirtz, J., Mattila, A. S., & Oo Lwin, M. (2007). How effective are loyalty reward programs in driving share of wallet? *Journal of Service Research, 9*(4), 327.

**EFFECT OF UNIQUE EXPERIENCES AND PERFORMANCE ON THE QUALITY OF
A FUNDRAISING EVENT:**

Incorporating the International (I) Sounds (S) and Tastes (T) into a Tourism (T) Education (E)
Fundraising Event

Po-Ju Chen

Rosen College of Hospitality Management
University of Central Florida, USA

Sivika Senyanuapap

Rosen College of Hospitality Management
University of Central Florida, USA

Xu Li

Rosen College of Hospitality Management
University of Central Florida, USA

JI-Eun Lee

Rosen College of Hospitality Management
University of Central Florida, USA

ABSTRACT

*The intent of this study was to examine fundraising event quality, performance and uniqueness. More specifically, this study examined the role of event performance and uniqueness of experience in predicting the perceptions of event quality of a hospitality and tourism education fundraising event. An on-site intercept survey collected data from 380 randomly selected event attendees of the Bacchus Bash, an annual fundraising event for hospitality and tourism education. Exploratory Factor Analysis with Varimax rotation resulted in a three-dimensional event performance. A new construct, Unique Event Experience, measured the international music, entertainment as well as food and drink sampling experience provided. The multiple regression model with all four predictors produced an R-square of 41.4% ($R=64.4\%$; $F=66.46^{**}$; $df=4,376$). Among the four predictors, Hedonic Performance ($\beta=.365$; $t=6.55^{***}$) was the strongest predictor of event quality, followed by Event Design Performance ($\beta=.145$; $t=2.65^{***}$). The findings reveal Unique Experiences (entertainment, food and drink sampling experience) ($\beta=.137$; $t=2.86^{**}$) statistically significantly predicted the fundraising event quality. This implies that fundraising event planners to focus on designing special events that not only address fundraising, but also include a unique experience for donors and attendees will lead to a perception of a high quality event. Recommendations for event planning and implications for future studies were also addressed. This study concluded that a successful event to incorporating the international (I) sounds (S) and tastes (T) into a tourism (T) education (E) fundraising event. Recommendations for event planning and implications for future studies were also addressed.*

KEYWORDS: Event quality, event performance, event management, unique experience, fundraising event

INTRODUCTION

Special events are an effective means for organizations to develop relationships, enhance awareness of the organization's objectives, and increase community pride (Einarsen & Mykletun; 2009; Getz, 2007; Schofield & Thompson, 2007; Webber, 2004). They also serve as a means to raise funds and support charity. Meer (2010) found that social ties (peers, alumni, etc.) impact the types of donations and amounts made by donors. The effectiveness of the core event and resulting support network development are the major factors determining whether an event meets its objective (Einarsen & Mykletun, 2009; Getz, 1997; 2007).

Service quality is critical to all hospitality and tourism activities, including special events (Gatez, 2007; Moscardo, 2007; Rosenbaum and Wong, 2010; Yuan & Jang, 2008). According to Crompton and Love (1995) performance is the most valid predictor of event success. In special events and festivals, attendee evaluation of quality is a means to judge the success of event organization, design and program execution. In a study of 40 events, Rosenbaum and Wong (2010) concluded that successful event planners focus on event design to enhance the objectives and uniqueness of the experience. Identifying factors that may predict event quality is important to event organizers in order to efficiently plan and implement high quality fundraising programs that will accomplish the major objective – charitable giving.

Evaluation of special event quality, including attendee satisfaction which translates into intent to re-visit the event in the future, is critical for determining the success of the event. According to Baker and Crompton (2000), "Quality of performance, which may also be termed quality of opportunity, refers to the attributes of a service which are primarily controlled by a supplier. It is the output of a tourism provider. Evaluations of the quality of performance are based on event attendees' perceptions of the performance of the provider." (p. 787). Event planners should consider designing and implementing marketing actions that focus on value equity, in addition to traditional planning that relies on the service marketing mix (Moscardo, 2007; Rosenbaum & Wang, 2010). In their study, Baker and Crompton (2000) concluded the perceived quality of the event (festival) directly predicted attendee intention to visit.

Therefore, the purpose of this study was to examine event performance and uniqueness of experience on fundraising event quality. More specifically, this study examined the role of three dimensions representing event performance (Hedonic, Event Design, and Informative performance) and uniqueness of experience (sampling food and drinks) in predicting the perceptions of event quality in a hospitality and tourism education fundraising event.

THE UNIQUE EXPERIENCE AND EVENT PERFORMANCE

This study was conducted using data collected from attendees of the Bacchus Bash Festival, an annual fundraising event for hospitality and tourism education. The 22nd annual event was organized by the local hospitality association located in Orlando, Florida. The fundraiser was designed to invite local hotels, restaurants, attractions and association members to participate as vendors, providing food, drinks, desserts and entertainment to raise funds in support of hospitality and tourism education. The majority of vendors are well-known international hospitality and tourism companies. The slogan chosen for the festival was "*Feast the very best entrees, drinks, and deserts; Enjoy the very best entertainment; & Incredible Shopping.*"

The intent of this study was to determine if perceived uniqueness of attendee experiences and event performance were significantly related to overall evaluation of event quality. For this study, uniqueness of event attendee experience was the international entertainment, music as

well as food and drink sampling theme with fundraising for hospitality and tourism education. Organizers selected Bacchus, the Roman-Greco God of Wine, to represent a community street party in a shopping mall as the theme for the fundraising event. Vendors consisted of local hotels, restaurants, destination promotion companies, and local music entertainers. The event organizer designated locations for vendors to set up booths along the outdoor walkways that connected the shops which comprise the outlet mall. Vendors provided food and beverage sample, entertainment, and a silent auction. Small food and drink sample sizes were selected over larger serving sizes to enable attendees to enjoy a wider variety of food and beverage offerings as they walked along the festival. The food, drink, and dessert samples typically represented the signature dishes many of the vendors were known for. The food and drink items were prepared on-site and served by vendor chefs and culinary staff.

The revenue from the food and beverage sales, as well as entertainment, was collected to support local hospitality and tourism education through scholarships for hospitality students. The event attracted over 27,000 attendees and raised over \$100,000 for hospitality and tourism education scholarships during a single five hours fundraising event. The Bacchus Bash was deemed to be a successful event incorporating international (I) sounds (S) and tastes (T) for the hospitality and tourism (T) education (E) fundraising event.

METHOD

Data was collected using intercept surveys completed on-site by event attendees. Due to the short duration of the event (five hours), a group of 56 trained interviewers were recruited to conduct the interviews. The onsite interviewers were assigned intercept points where event attendees were expected to gather after sampling food and beverage offerings. In order to ensure participants had experienced the event, the criteria sampling technique was employed. The interviewers collected data from those attendees who were present during at least two of the five event hours. The researchers invited randomly selected attendees who appeared to have not only sampled food and beverages, but also appeared to have participated in entertainment activities as well to participate in the survey.

Upon agreeing to participate in the study, attendees were instructed to complete the survey questionnaire on site. This approach was deemed appropriate as it allowed researchers to address questions participants had, as well as provided opportunities to collect additional information, if necessary. The intercept interview approach also served well in that it reduced missing data (Esu & Arrey, 2009). A sample of 500 attendees that met the stated participation criteria was randomly selected resulting 380 useable data for the analysis.

The event attracted a large number of members from the local area hospitality and tourism industry (43.2%) as well as those not employed in the industry (56.8%). Under half (47.6%) were first time attendees, while 52.4% had been to at least one other occurrence of the annual event. On average, those who attended the event in previous years had attended more than two other times. The majority of participants were female (51.5%), single (51.9%) and possessed some college or higher education (89.1%). Approximately two-thirds of participants were under 30 years old. Approximately 10% of attendees were international tourists.

The purpose of this study is to examine how unique experience (food and drink sampling) combined with event performance predicts attendee perception of event quality. The survey instrument was developed using a two phased approach. The first phase involved a thorough review of related literature to identify measurement variables. This review resulted in the

identification of three major constructs: 1) unique experiences (international music, entertainment, food and drink sampling experiences) in a fundraising event, 2) event performance, and 3) event quality. The second phase was used to conduct focus groups consisting eight and twelve participants who had attended the event previously to discuss their experiences. This was followed by inviting event and tourism scholars and event sponsors to examine the wording and statement relatedness of the instrument produced during these two phases. This procedure was critical to ensure the face validity of the variable sets and resulted in adding several critical event performance attributes to the study instrument.

A set of 17 event performance attributes was developed from the two phased procedure. These attributes included items such as “The objectives of fund raising for hospitality and tourism education are well communicated,” “The display layouts of this Festival are well designed,” and “Food and beverage quality is excellent.” Attendee perception of event quality was measured by the single attribute: “The overall quality of the event is excellent.” The unique event experience was measured by asking participants to evaluate their food and drink sampling experiences. The construct attributes were measured with a five point Likert scale ranging from “1-strongly disagree” to “5-strongly agree”. In addition to the three scale sets, socio-demographic variables, information sources, and event experience were included in the study instrument.

FINDINGS

The 17 fundraising event performance attributes were subjected to Exploratory Factor Analysis (EFA) to examine the underlying dimensions, using the Principal Component Analysis with Varimax rotation procedure. The Kaiser-Meyer-Olkin test measured sampling adequacy (KMO =.90) and Bartlett’s Test of Sphericity (2495.85***; df=136) which indicated the factor analysis procedure to be appropriate for event performance attributes. The three dimension solution explained 53.64% of variances. Based on compositions of the attributes in each of the dimensions, the following labels were assigned: *Hedonic Dimension* (i.e., entertainment, quality of food and beverage, time of the day (Friday for fun), location (shopping mall)), *Event Design Dimension* (i.e., adequate number of tables, event layout, location, weather, etc.), and, *Informative Dimension* (i.e., communication of fundraising objectives, and event information). The face validity of the three dimensions was further confirmed by event scholars and organizers.

In order to ensure how well each set of performance attributes measures the underlying dimension, reliability analysis was performed. The internal consistency coefficients (Cronbach’s Alpha) were calculated for the three sets of performance attributes. The Cronbach’s Alphas of the three dimensions ranged from 0.82 (good) to 0.76 (acceptable).

Correlation and multiple regression analysis were conducted to examine the relationship between fundraising event quality and the following identified predictors: *Hedonic Performance*, *Event Design Performance*, and *Informative Event Performance* and *Unique Event Experience* (food and drink sampling experience). Prior to regression analysis, all variables were examined to ensure the basic assumptions of normal distribution, homoscedasticity, and no multicollinearity (all bivariate correlation coefficients were less than .7; VIF < 2). Thus, the variables identified met assumptions for the procedure. The multiple regression model with all four predictors produced an R-square of 41.4% (R=64.4%), F=66.46; df=4,376; and p<.001. The multiple regression equation for a fundraising event is:

$$\text{Fundraising Event Quality} = -.47 + .55 * \text{Hedonic Performance} + .22 * \text{Event Design Performance} + .17 * \text{Informative Performance} + .16 * \text{Unique Experience}$$

Among the four predictors, *Hedonic Performance* ($\hat{\alpha}=.365$; $t=6.55^{***}$) was the strongest predictor to event quality, followed by *Event Design Performance* ($\hat{\alpha}=.145$; $t=2.65^{***}$). *Unique Experiences* (entertainment, food and drink sampling experience) ($\hat{\alpha}=.137$; $t=2.86^{**}$) statistically significantly predicted the fundraising event quality. The findings showed the objective of the fundraising event with related information (*Informative Performance*) ($\hat{\alpha}=.129$; $t=2.49^*$) was also a significant predictor of fundraising event quality.

CONCLUSION

The major findings of this study contribute significantly to the managerial implications of a fundraising event. First, this study reveals three underlying dimensions of an event. The Hedonic dimension was found to be the most significant positive predictor of event quality, followed by Event Design and Informative dimensions. This implies that organizations should emphasize the fun and enjoyment aspects of participating in a fundraising event. Communication and design of the program are also critical to attendee perception of event quality.

The results of the study indicated that a unique event experience was one of the significant predictors to the perception of event quality. This is a new construct identified in a fundraising event context. For this study, the opportunity for attendees to sample signature foods and drinks from well known members of hospitality and tourism organization was a unique experience. This implies that fundraising event planners should focus on designing special events that not only address fundraising, but also include a unique experience for donors and attendees which will lead to a perception of great quality for the event.

Furthermore, this study support the findings by Croson, et al. (2008) and Kottasz's (2004) which indicate females participate in such events more so than males. The Bacchus Bash fundraising event also attracted donors employed in hospitality and tourism organizations with similar social ties, confirming Meer's (2010) findings. Future studies to investigate the themes and design of fundraising events are warranted.

REFERENCE:

- Baker, D., & Crompton, J. (2000). Quality, satisfaction and behavioral intention. *Annals of Tourism Research*, 27(3), 785-804.
- Bowen, D., & Schouten, A.F. (2008). Tourist satisfaction and beyond: tourist migrants in Mallorca. *International Journal of Tourism Research*, 10(2), 141-153.
- Crompton, J.L., Love, L.L. (1995). The predictive validity of alternative approaches to evaluating quality of a festival. *Journal of Travel Research*, 34(1), 11-25.
- Croson, R., Handy, F., & Shang, J. (2009). Gendered giving: The influence of social norms on the donation behavior of men and women. *International Journal of Nonprofit and Voluntary Sector Marketing*, Retrieve on Jan 5, 2010 at <http://dx.doi.org/10.1002/nvsm.385>
- Einarsen, K., & Mykletun, R. J. (2009). Exploring the success of the Gladmatfestival (The

- Stavanger Food Festival). *Scandinavian Journal of Hospitality and Tourism*, 9(2/3), 225-248.
- Esu, B.B., Arrey, & V.M.A. (2009). Tourists' satisfaction with cultural tourism festival: a case study of Calabar Carnival Festival, Nigeria. *International Journal of Business Management*, 4 (3), 116-125.
- Getz, D. (2007). *Event studies: theory, research and policy for planned events*. Oxford: Elsevier.
- Graefe, A.R., & Hong, K.W. (2004). Predicting event satisfaction by using SERVPERF and circumplex model of affect: Flower Blossom Festival of JeJu Island. *Journal of Tourism and Leisure Research*, 16(4), 11-30.
- Grant, H., & Dweck, C. S. (2003). Clarifying achievement goals and their impact. *Journal of Personality and Social Psychology*, 85(3), 541-553.
- Kottasz, R. (2004). Differences in the donor behavior characteristics of young affluent males and females: Empirical evidence from Britain. *International Journal of Voluntary and Nonprofit Organizations*, 15(2), 181-203.
- Lastovicka, J.L., Gardner, D.M. 1979. Components of involvement, in: Maloney, J., Silverman, B. (eds), *Attitude Research Plays for High Stakes* (pp 53-73). American Marketing Association, Chicago.
- Li, M., Huang, Z., & Cai, L. A. (2008). Benefit segmentation of visitors to a rural community-based festival. *Journal of Travel & Tourism Marketing*, 26(5/6), 585-598.
- Meer, J. (2010). Brother, can you spare a dime? Peer pressure in charitable solicitation. *Journal of Public Economics*, 95(7-8), 926-941.
- Moscardo, G. (2007). Analyzing the role of festivals and events in regional development. *Event Management*, 11, 23-32.
- Rosenbaum, M.S., & Wong, I. N. (2010). Value equity in event planning: A case study of Macau. *Marketing Intelligence & Planning*, 28(4), 403 – 417.
- Schofield, P., Thompson, K. (2007). Visitor motivation, satisfaction and behavioral intention: The 2005 Naadam Festival, Ulaanbaatar. *International Journal of Tourism Research*, 9(5), 329-344.
- Webber, D. (2004). Understanding charity fundraising events. *International Journal of Nonprofit and Volunteer Sector Marketing*, 9(2), 122-136.
- Yuan, J., & Jang, S.C. (2008). The effects of quality and satisfaction on awareness and behavioral intentions: Exploring the role of a wine festival. *Journal of Travel Research*, 46(3), 279-288.

FACILITATING ATTENDEE'S SOCIAL EXPERIENCE AT CONVENTIONS

Xiaoxiao Fu
School of Hospitality and Tourism Management
Purdue University, U.S.A.

Carole (Wenqian) Zhang
School of Hospitality and Tourism Management
Purdue University, U.S.A.

and

Xinran Y. Lehto
School of Hospitality and Tourism Management
Purdue University, U.S.A.

ABSTRACT

This study proposes a social experience model for convention attendees. The model consists of social motives, physical environmental factors, social experience, as well as perceived social value. Interrelationship among the concepts will be examined based on empirical evidence from an academic conference. Our findings will contribute to the knowledge of social dimension of consumer experience in the convention context, and provide managerial implications for convention practitioners.

KEYWORDS: Social experience, perceived social value, physical environment, social motives.

INTRODUCTION

In recent years, the convention industry has increased greatly to cater for the great number of meetings and conferences worldwide. In the United States, it has been estimated that 11 million corporate events and 13,700 conventions were held in 2007 (Braley, 2008). Accordingly to a report prepared by PricewaterhouseCoopers (Davis, 2011), U.S. convention industry generated a direct spending of 263 billion in 2009. Yet the number, according to PWC, perhaps still represented the abysmal level of the convention industry as a result of economic hardships. On a global scale, the market is bursting with vigor as the Union of International Associations (UIA) estimated that 11,423 international meetings took place in 2008 worldwide (UIA, 2009). By and large, convention proves to be a promising industry, which on the one hand brings cheers to the tourism industry, and on the other, spells increasing competition among venues vying for this market. An industry report by the International Congress and Convention Association (ICCA, 2008) indicated that "meeting facilities in hotels" remain the most popular venue for events since 2005. In 2008, the use of meeting facilities in hotels consolidated its hold on first place, followed by use of conference/exhibition centers and use of universities.

Recognizing the importance of this promising industry, scholars have dedicated research effort exploring its various aspects, such as economic impact (Kim, Chon, & Chung, 2003), management and service (Astroff & Abbey, 2006), buyer-seller relationship (Jones & Suh, 2006) as well as capacity optimization (Yang & Gu, 2011). Despite the fair amount of inquiries into

convention industry, studies attended to convention attendees' experience are rather scant and sketchy. What drives people to attend conventions and what kind of experience they are looking for is a topic of importance. Socializing with others can be one important motive. Furthermore, a social experience at convention may represent itself in various forms, such as accidental or purposeful, formal or informal, small group dynamic or large group dynamic. For instance, accidental socializing is unplanned while purposeful socializing is goal-oriented, including active and motivated networking activities. During such socializing activities, attendees may hold and demonstrate certain value. Social value is one of perceived value, which has been developed and utilized extensively in fields of sociology and psychology. Most early studies on perceived value placed emphasis on functional aspects, however, recent research have identified social value as having influence on service experience in many consumptive situations (P.-T. Chen & Hu, 2010; Sweeney & Soutar, 2001). Yet, limited research has been devoted to examine social value in a convention setting.

Conventions, by nature and by design, signify congregational activities in which social interactions are inevitably likely to happen. Convention establishments are usually contracted venues for the gatherings during a specific time period. Thus, the facilities are of particular importance to attendees' social experience due to the relatively concentrated and confined physical environment where people gather and mill around. In this regard, the uniqueness of physical environment presents both chances and challenges for social activities as psychologists have found that some people, such as first time conference attendees, feel awkward to interact with each other when they fail to be in familiar social settings (Rogers and Brignull, 2002). To date, sporadic research has accounted for the influence of physical environmental factors on attendee experience.

Nevertheless, in existing convention literature such features and their interrelations have received disappointingly little attention, with respect to both volume and depth. Particularly, it remains unexplored empirically if a venue environment meets attendees' social value by allowing them to have a good socializing experience. Therefore, the goals of this research are to examine the interrelationships among social motives, physical environment, attendee social experience and perceived social value.

LITERATURE REVIEW

Social motives at conventions

Socialization represent an innate human pursuit since the hunter-gatherer era. The motive of taking part in social activities and securing a sense of belongingness has been identified, along with other basic human desires, by Maslow's hierarchy of needs (1954) and numerous subsequent studies. In order to be recognized as part of a group, people learn to accept, adjust, and cooperate with each other. Over time, the established interrelationships need to be maintained, reinforced or replaced. Therefore, people attempt to fulfill their needs by engaging in socializing behaviors, such as touching base with friends and colleagues and making new acquaintances who may share common interests.

Crompton's conceptual framework of sociopsychological motivational domains (1979) found that socialization desires such as interacting with others are important motives that drive leisure activities. In a later empirical study, Crompton and McKay (1997) identified social motives for attending festivals. The social motives were divided into two dimensions: Known-group socialization and External interaction/socialization. The former dimension comprises of items such as I go to Fiesta so I can be with my friends; I like to go to Fiesta with a group; I do not go to Fiesta to be with others who enjoy the same things I do. The latter dimension includes the following items: I go to Fiesta because it is a chance to be with people who are enjoying themselves; I like to go to Fiesta to be with and observe the other people who are attending; When attending events at Fiesta, I like to meet new people. In the particular setting of convention, Severt et al. (2007) assessed attendees motivation and revealed five motivational factors. They are activities and opportunities, networking, convenience of conference, education benefits and products and deals. In the factor of networking, specific items such as Job opportunities, Networking opportunities and Escape from routine were identified. Another empirical study on mega-business event attendee also found networking and business opportunities to be the top-rated motivational factors (Bauer et al. 2008).

Physical Environment Conducive to Social Experience

As psychologist Skinner (1977) contended that "the variables of which human behavior is a function lie in the environment", along with stance of Bennett and Bennett (1970) that, "all social interaction is affected by the physical container in which it occurs" (p. 22), physical settings have an impact on the social experience. This social dimension of space has been explored in existing studies and many components of the dimension were proposed. Goffman's Dramaturgy (1959) suggested that an experience be influenced by the setting which encompasses physical layout, furniture, and décor (1959, p.22). Bittner's Servicescape (1992) posited that the concept of environmental dimensions involve ambient conditions, space/function, and signs, symbols and artifacts. The category of space/function contains components such as layout, equipment and furnishings. In delineating creative design of the event environment, Nelson (2009) proposed that the environment be measured from elements such as set design, ambient conditions, music/aroma, room temperature, props (amenities), décor, light/AV/sound/special effects, and room layout/functionality. In the context of retailing, Rosenbaum (2006) proposed the social dimension of space, which includes food, prices, ambient conditions, space/layout, signs, symbols, and artifacts.

Social Experience

Since social networking has been identified as one of the major motives for attending a conference (Yoo & Zhao, 2010; Lee & Back, 2008), conference attendees participate in various socializing activities such as trading business cards, forming new acquaintanceship, or reinforcing professional connections with the hope of establishing meaningful ties. All these activities were observed as an experience with greatest value (Louie, 2008).

Experience is depicted as an obscure and diverse phenomenon, which is mostly constituted by individual consumer (Uriely, 2005). The actual social experience obtained by attendees may vary at individual level. For instance, at an academic conference, social experience of junior faculty, senior faculty and students may be different. The exact definition of experience has developed for couples of years, and from different disciplinary perspectives it

could be viewed in various ways (Walls, Okumus, Wang, & Kwun, 2011). Considering the specific background of this study, definition derived from sociology and psychology is chosen, which views experience as a blend of many elements coming together and involve the consumer emotionally, physically, intellectually and spiritually (Mossberg, 2007).

Based on the framework proposed by Walls et al. (2011), the composition of hospitality and tourism consumer experience could be divided into two parts: the core is comprised of four components including ordinary, extraordinary, cognitive and emotive; the peripherals are influencing factors which may include perceived physical experience, perceived human interaction, individual characteristics and situational factors. Specifically, among all these elements involved with experience, human interaction, or social interaction, is considered interdependent activities through dissemination of information, which is a dynamic relationship building during communication, interaction among various society units (Hsieh & Wang, 2011). The meaning of an experience can be derived from social interactions with others (Hewitt, 2000; Hsieh & Wang, 2011). To better understand the social experience in a convention, the study will adopt measurement items for social interaction.

Perceived Social Value

Perceived value is the consumer's overall assessment of the utility of a product based on perceptions of what is received and what is given (Sinha & Desarbo, 1988; Zeithaml, 1988). However, later researchers believe that perceived value is not only applicable to products, but can also be explored in the domains of service and experience (Petrick, 2002). As a combination of both tangible and intangible products, service and experience (Lau & Wong, 2010), conventions are appropriate occasions to study the role of perceived value.

A few multidimensional models have been developed since Zeithaml (1988). Sinha and DeSarbo (1988) proposed that perceived value was clearly a multi-dimensional construct derived from perceptions of price, quality quantity, benefits and sacrifices. Sheth, Newman and Gross (1991) perceived consumer choice as a function of five consumption value dimensions, including social, emotional, functional, epistemic and conditional value. According to another study (Sweeney, Soutar, & Johnson, 1999), perceived value consisted of social value, emotional value and functional value for price, quality and versatility separately. In a later study (Sweeney & Soutar, 2001), the authors placed this model into a scale of four dimensions, including functional value for price, functional value for quality, social value and emotional value. Using such dimensions, they assessed customers' value perception in the context of consumer durable goods.

As one of the dimensions of perceived value which has been identified by above research and many others, social value means the enhancement of social self-concept (Chen, 2006; Petrick, 2002; Sweeney & Soutar, 2001). For both themselves and others, people's social images could be improved by gaining social value. In the particular setting of events and conventions, social value develops during a process. Firstly, participants in conventions consider the experience in relation to related groups of people. Secondly, they explore to recognize and classify their own identities. Then they promote their images. Eventually, corresponding symbolic value will be obtained (Park, Jaworski, & MacInnis, 1986; Wang, 2010).

Social value could be measured by a handful of items, depending on the specific research situation. The different weights of each value item demonstrate different levels of importance and contribution to the final choice or behavior (Sheth, Newman, & Gross, 1991). Sweeney and Soutar (2001) developed a 19-item measurement in which 4 items were supposed to assess the dimension of social value, and this scale has been utilized and recommended by plenty of researches afterwards. Petrick (2002) adapted this scale in the setting of intangible tourism service and proposed a 25-item multi-dimensional scale. Wang (2010) applied the scale to measure consumers' brand preference and purchase intention of snack food. To fit this study better, we would utilize the scale proposed by Sweeney and Soutar (2001) to measure the specific items related to perceived social value.

Based on related literature as well as our research goals, a model was proposed (see Figure 1). The specific hypotheses of the study are as follows:

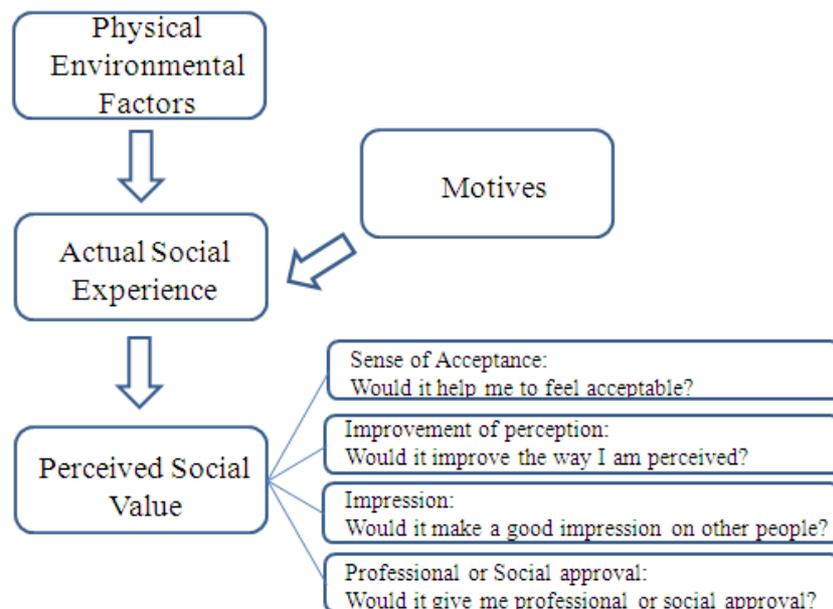


Figure 1: A relationship model of motives, environmental factors, social experience and perceived social value.

H1: Attendees' motives to attend a convention have an influence on their actual social experience.

H2: Physical environmental factors have an influence on the actual social experience.

H3: There is a positive relationship between the actual social experience at the convention and attendees' perceived social value.

METHODOLOGY

Instrumentation

The research instrument developed for data gathering will be designed as a questionnaire and consisted of scales to measure social motives, physical environmental factors, social experience, and perceived social value. The questionnaire will consist of four major sections: 1) general demographic background; 2) social motives; 3) physical environment; 4) social experience; 5) perceived social value.

Social motives-The instruments used to measure perceived crowding were adapted from Crompton and McKay (1997), Severt et al. (2007), and Bauer et al. (2008). Two measurement items were proposed as a result. Attendees will be asked to rate the importance for two motivational factors, job opportunities and networking opportunities.

Physical environment-For physical environment factors, existing measurements such as those of Goffman (1959), Bittner (1992), and Nelson (2009) will provide a foundation for the instrument development. Considering the uniqueness of convention environment, we proposed a modified version of aforementioned measurement items, which includes physical layout, equipment, furnishings, and functionality.

Social experience-Social experience will be measure through social interaction, and the latter has been studied in the theory of pragmatism (Hsieh & Wang, 2011). Combined this theory with empirical evidence, Wei-Shan & Shu-Tai (2011) summarized the measurement for social interaction variables as follows: "Feel friendliness of others", "Make me talk to others easily", "Connection with other members of the conference", "Meet new people easily", "The frequency of meeting people", "The time interacting with people was sufficient", "Make new friends", "Exchange opinions about the conference", and "Share new information with others".

Perceived social value-Four specific items will be adopted from Sweeney and Soutar's 19-item measurement to assess overall perceived value. Weight of each item measures participants' perceptions of the value of attending conventions. Such items include: "Would it help me to feel acceptable", "Would it improve the way I am perceived", "Would it make a good impression on other people", and "Would it give me academic or social approval".

Procedure

On-site survey will be distributed at an academic conference in 2011. The focal study subjects are graduate students at the conference. Participants will also have the option of filling out the questionnaire online or post conference. We collect data in a series of conferences with the aim of increasing representation and thereby allowing for higher level of generalizability of the results. Appropriate statistical analysis will be applied depending on the nature of variables and the relationships under investigation.

EXPECTED CONTRIBUTION

Convention facilities are supposed to be sociable accommodations for attendees who ubiquitously seek meaningful encounters. Socializing activities among attendees promise business opportunities. Louie (2008) suggests the use of bar and evening social events to

encourage attendees to “stick around”. Therefore, how to help attendees break the ice and interact at ease with peers in an unfamiliar physical environment is of strategic significance to the venues. Notwithstanding this acknowledged phenomenon, its significance has not been duly noted in existing literature. As one of the first attempts to investigate social experience and perceived social value in the specific context of physical environment, this study contributes to the convention literature by deepening the understanding of attendees’ experience, particularly their social motives and social value. The findings will enable industry practitioners to better serve this market with a sociable venue environment. In specific, venues will be informed of the desired facilities and will be able to initiate necessary development accordingly. For instance, in planning venue designs, developers can furnish the meeting environment in a way that enhances social functions; thereby fulfill attendees’ social pursuits.

REFERENCES

- Astroff, M.T. & Abbey, J.R. (2006). *Convention Management and Service* (7th ed.). Lansing, MI: Educational Institute American Hotel & Lodging Association.
- Bauer, T, Law, R., Tse, T., & Weber, K. (2008). Motivation and satisfaction of mega business event attendees the case of ITU Telecom World 2006 in Hong Kong. *International Journal of Contemporary Hospitality Management*, 20 (2):228-234.
- Bennett, D. J. & Bennett, J. D. (1970). Making the Scene. *Social Psychology Through Symbolic Interactionism*. G. Stone and H. Farberman, eds. Waltham, MA: Ginn-Blaisdell, 190-196.
- Bitner, M. J. (1992). Servicescapes: The impact of physical surroundings on customers and employees. *Journal of Marketing*, 56(2), 57–71.
- Brale, S. (2008, August 1). 2008 Meetings market report: Our biennial survey of the meetings industry. Retrieved March 14, 2011, from MCMagazine: <http://www.mcmag.com/print.aspx?id=11302>
- Chen, P.-J. (2006). The Attributes, Consequences, and Values Associated with Event Sport Tourists' Behavior: A Means-End Chain Approach. *Event Management*, 10, 1-22.
- Chen, P.-T., & Hu, H.-H. (2010). The effect of relational benefits on perceived value in relation to customer loyalty: An empirical study in the Australian coffee outlets industry. *International Journal of Hospitality Management*, 29, 405-412.
- Crompton, J. (1979). Motivations for pleasure vacation. *Annals of Tourism Research*, 6(4), 408-424.
- Crompton, J. L., & McKay, S. L. (1997). Motives of visitors attending festival events. *Annals of Tourism Research*, 24(2), 425-439.
- Davis, C. (2011, February 18). PwC Measures Annual U.S. Meetings Industry Spending At \$263B. *BusinessTravelNews*. Retrieved March 14, 2011 from [http://www.businesstravelnews.com/Business-Travel/Business-Meetings/Articles/PwC-Measures-Annual-U-S--Meetings-Industry-Spending-At-\\$263B/](http://www.businesstravelnews.com/Business-Travel/Business-Meetings/Articles/PwC-Measures-Annual-U-S--Meetings-Industry-Spending-At-$263B/)
- Goffman, E. (1959). *The Presentation of Self in Everyday Life*. New York: Anchor Books.
- Hewitt, J. R. (Ed.). (2000). *Self and Society: A Symbolic Interactionist Social Psychology* (8th ed.). MA: Allyn & Bacon.

- Hsieh, W.-S., & Wang, S.-T. (2011). *The Influence of Food and Beverage Service on Social Interaction in a Conference*. Paper presented at the 9th APacCHRIE Conference Hospitality and Tourism Education: From a Vision to an Icon, Hong Kong.
- International Congress and Convention Association (ICCA). (2008). The international association meeting market. Retrieved March 17, 2011, from: <http://www.iccaworld.com/dcps/doc.cfm?docid=876>
- Jones, D. L. & Suh, E (2006). International buyer-seller relationships for participation in tradeshow/exhibition sponsorship: a conceptual model for decision making. *2006 Pacific Asia Travel Association Education and Training Forum*.
Retrieve from <http://fulltext.phuket.psu.ac.th/proceeding/2549/24608.pdf>
- Kim, S. S., Chon, K., & Chung. K. (2003). Convention industry in South Korea: An economic impact analysis. *Tourism Management*, 24(5), 533-541.
- Lau, C. K. H., & Wong, S. C. K. (2010). The Value of Conventions and Events: Perspectives and Experiences of Industry Leaders at International Convention and Expo Summit 2009. *Journal of Convention & Event Tourism*, 11, 234-246.
- Lee, M. J., & Back, K. (2008). Association Meeting Participation: A Test of Competing Models. *Journal of Travel Research*, 46(3), 300 -310.
- Louie, A. (2008). Designing a user-centered conference for user-centered information professionals: The story of InfoCamp Seattle. *Bulletin of the American Society for Information Science and Technology*. 34(5), 5-9.
- Maslow, A. H. (1954), *Motivation and Personality*, New York: Harper.
- Mossberg, L. (2007). A Marketing Approach to the Tourist Experience. *Scandinavian Journal of Hospitality & Tourism*, 7, 59-74.
- Nelson, K. (2009). Enhancing the Attendee's Experience through Creative Design of the Event Environment: Applying Goffman's Dramaturgical Perspective. *Journal of Convention & Event Tourism*, 10(2), 120-133.
- Park, C. W., Jaworski, b. J., & MacInnis, D. J. (1986). Strategic brand concept/image management. *Journal of Marketing*, 50, 135-145.
- Petrick, J. F. (2002). Development of a Multi-Dimensional Scale for Measuring the Perceived Value of a Service. *Journal of Leisure Research*, 34(2), 119.
- Rogers, Y. & Brignull, H. (2002). Retrieved from http://www.informatics.sussex.ac.uk/research/groups/interact/publications/Rogers_ice-breaker.pdf
- Rosenbaum, M. S. (2006). Exploring the social supportive role of third places in consumers' lives. *Journal of Service Research*. 9 (1), 59-72.
- Severt, D., Wang, Y., Chen, P.-J., & Breiter, D. (2007). Examining the motivation, perceived performance, and behavioral intentions of convention attendees: Evidence from a regional conference. *Tourism Management*, 28(2), 399-408.
- Sheth, J. N., Newman, B. I., & Gross, B. L. (1991). Why we buy what we buy: A theory of consumption values. *Journal of Business Research*, 22(2), 159-170.
- Sinha, I., & Desarbo, W. S. (1988). An Integrated Approach toward the Spatial Modeling of Perceived Customer Value. *Journal of Marketing Research*, 23, 236-249.
- Skinner, B.F. (1977). Why I am not a cognitive psychologist. *Behaviorism*, 5(2), 1-10.
- Sweeney, J. C., & Soutar, G. N. (2001). Consumer Perceived Value: The Development of a Multiple Item Scale. *Journal of Retailing*, 77, 203-220.
- Union of International Associations (UIA) (2009). International Meeting Statistics for the year

- 2006 – press release. Retrieved March 17, 2011, from <http://www.uita.org/statistics/press>
- Uriely, N. (2005). The Tourist Experience: Conceptual Developments. *Annals of Tourism Research, 32*, 199-216.
- Walls, A. R., Okumus, F., Wang, Y., & Kwun, D. J.-W. (2011). An Epistemological View of Consumer Experiences. *International Journal of Hospitality Management, 30*, 10-21.
- Wang, E. S.-T. (2010). Impact of Multiple Perceived Value on Consumers' Brand Preference and Purchase Intention: A Case of Snack Foods. *Journal of Food Products Marketing, 16*, 386-397.
- Yang, L-T. & Gu, Z. (2011). Determining the Optimal Capacity for the MICE Industry in Las Vegas. *Proceedings of the 16th Graduate Students Research Conference*. Retrieved from http://scholarworks.umass.edu/cgi/viewcontent.cgi?article=1289&context=gradconf_hospitality
- Yoo, J. & Zhao, X. (2010). Revisiting Determinants of Convention Participation Decision Making. *Journal of Travel & Tourism Marketing, 27*(2), 179-192.
- Zeithaml, V. A. (1988). Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence. *Journal of Marketing, 52*, 2-22.

PERCEPTION OF CROWDING AND EXPERIENCE SATISFACTION IN A BEACH SETTING: EXPLORING THE MODERATING EFFECT OF DESIRED PRIVACY

Xiaoxiao Fu
School of Hospitality and Tourism Management
Purdue University, U.S.A.

and

Xinran Y. Lehto
School of Hospitality and Tourism Management
Purdue University, U.S.A.

ABSTRACT

In the context of beach, we are examining the relationship between perceived crowding and overall experience satisfaction in this paper. We further investigate the moderating effect of desired privacy in such a relationship. Privacy has long been a concept based on western theory, this study explores such a concept in China, a setting where western theories may not be as fitting due to its unique cultural dispositions. Our findings will allow for theoretical and managerial implications, and these are discussed towards the end of this paper.

KEYWORDS: crowding, privacy, beach destination, tourist satisfaction, China, tourist preference.

INTRODUCTION

As a classic inquiry in leisure science, crowding has received considerable attention, of which a significant amount have been devoted to national park settings (Vaske & Shelby, 2008; Hsu, Li, & Chuang, 2007; Fleishman, Feitelson, & Salomon, 2004; Vaske, Donnelly, & Lehto, 2002; Stewart & Cole, 2001). These studies have been dedicated to exploring the acceptable level or limits for density or interpersonal encounter within a recreational environment. The impact of crowding on consumer experience has also been explored in a variety of business environments such as retailing (Eroglu & Machleit, 1990; Eroglu, Machleit & Feldman Barr, 2005) and restaurant (Noone & Mattila, 2009). It's noteworthy that the theoretical construct of crowding comprises of both physical crowding and psychological crowding. Physical crowding denotes the number of individuals in a given space while psychological crowding relates to the state of crowding perceived by individuals. This study explores the psychological state of crowding, which is subjectively delineated through perception. Perceived crowding is a topic of importance as it may directly influence consumer experience. In various service settings, both

positive and negative relationships between perceived crowding and consumption experience satisfaction have been revealed by prior research (Harrell, Hutt, & Anderson, 1980; Wickham & Kerstetter, 2000).

Privacy is another concept that has commanded intensive academic attention from sociology, psychology, anthropology to politics and history (McDougall, 2002). The desire of privacy can depend on a variety of factors, such as individual, cultural, social as well as environmental (Kaya & Weber, 2003). Regardless of situational factors, cultures usually generate privacy preferences of their own. As such, the ideal degree of privacy may vary from one culture to another. Some cultures have been acknowledged as having stronger awareness of privacy (e.g. action of wearing veil) while others do not demand as much (Altman & Chemers, 1980). Similarly, conducts perceived as normal social interaction in one society may be viewed as invasion of privacy in another. It is worth noting that privacy is a notion largely based on Western terminology. Compared to the rich and diverse terminologies for privacy in the European languages, there is a shortage of obviously equivalent vocabulary in some eastern languages (McDougall, 2002). It does not necessarily imply, however, that individuals of the Eastern cultures have low awareness of privacy as the concept may not be explicitly spelt out in such cultures. Therefore, it would be interesting to explore the issue of privacy in such a non-western setting.

In this research, we attempt to examine both perceived crowding and privacy constructs in the context of Chinese population. It intends to investigate the relationship between perception of crowding and experience satisfaction of Chinese domestic tourists. The role of privacy will also be assessed in the context of the crowding-satisfaction relationship. We aim to find out if desired privacy matter when visitors judge their experience in a crowded beach. In other words, if a customer desires high level of privacy, does he/she have a negative assessment of the experience when beach is perceived as crowded? The empirical evidences will be gathered at a popular beach destination in Eastern China. The context of a beach setting was chosen for this study based on several considerations. Beaches perceived by some visitors as congested and inconvenient may not be felt the same way by others. Visitors' stance on privacy may produce quite different perceptions of crowding. The physical environment of beach also bears some uniqueness. First of all, individuals occupy a limited space at beach and so that human interactions and corresponding perceptions are inevitably possible to occur. Another unique aspect of beach lies in the particular way of visitors' dressing. Iso-Ahola (1980) pointed out that clothing could be one of environmental mechanisms that regulate privacy due to the dual function that clothing performs. First, one's privacy can be protected by clothes. Second, arrangement of clothes can be used to signal the need for more interpersonal interaction.

The organization of this article is as follows. Firstly, it expands with literature related to crowding and privacy, and their dynamic linkages with destination experience satisfaction. It then reports on research methodology and expected empirical results. Finally, it concludes with discussions and implications.

LITERATURE REVIEW

Perceived crowding

The formation of perceived crowding is initiated by the recognition that space considered as adequate by an individual exceeds the actual space available to him/her (Stokols, 1972). As a result, a sense of constraint would be felt in the specific setting. Since the perception of crowding originates within the service environment, it is of importance to the overall experience and consumer satisfaction (Eroglu and Machleit, 1990; Machleit et al., 1994). According to existing literature, crowding has been viewed both negatively and positively in terms of its effect on consumer experience. In other words, customer's judgment on crowding is rather circumstantial across settings.

In nature reserve settings, the encounters between visitors and the physical settings were empirically tested by previous studies in order to yield managerial suggestions for carrying capacity and use limits. Vaske and Shelby (2008) summarized 181 prior studies on perceived crowding from 30 years of research. Using a 9-point scale, these studies provided 615 evaluative contexts of different natures. Inspection of previous research indicated that four independent variables influenced perceived crowding. The variables include the year a study was conducted, region of the country, country, and specific activity. The authors also found that consumptive versus nonconsumptive activities in fact had no major effect on the perception of crowding. Other studies explored how personal attributes such as cultural and demographic background can influence one's sensitivity to crowding. Fleishman, Feitelson, & Salomon (2004) examined crowding perception in the setting of two popular natural reserves in Israel and focused, in specific, on the influence of visitors' educational and ethnic background and the level of demographic resemblance among visitors. Younger visitors, with better education and of European and North American descent, are found to be less tolerant of crowding as opposed to those that are older and/or of Asian or African descent. Stewart & Cole (2001) sampled 452 visitors to Grand Canyon National Park in terms of their encounters and overall experience quality. A consistently negative relationship was found between encounters of other visitors and quality of experience, however, the resultant effect of visitors' negative perception on this relationship was not significant. In a non-north American recreational setting, Hsu et al. (2007) inspected encounters, norms and perceived crowding and their interrelationships among visitors. Using 475 obtained questionnaires obtained from hikers to Taroko National Park of Taiwan, the results demonstrated that 60% of hikers reported some degree of crowding. It's also revealed that when encounters exceed hikers' personal norm, their level of perceived crowding increases. Interestingly, the norms to regulate interpersonal encounters among Taiwanese hikers are found to be not as low as in study results reported in north American settings.

The majority of studies conducted so far have revealed a negative relationship between perceived crowding and overall satisfaction in natural settings. According to Schmidt and Keating (1979), crowding is a negative psychological evaluation of population density and has a negative impact on visitors' experience. There is also an assumed negative relationship between crowding and consumer satisfaction from the retailer's perspective (Harrell, Hutt, & Anderson, 1980; Machleit et al., 1994). Some studies have framed crowding as impediments to an enjoyable experience, which would result in negative emotional responses and satisfaction (Hui & Bateson, 1991; Getz, 1991; Machleit, et al., 2000). It's also argued that once a visitor perceives an area as crowded, the quality of individual experience will be reduced (Stewart &

Cole, 2008). These studies draw conclusions that shopper's satisfaction is likely to decrease in a perceived crowded service environment, which is not a desirable outcome for retailers.

In other contexts, however, a crowded environment is perceived as a desirable attribute which actually facilitates a pleasant experience. Wickham and Kerstetter (2000) found that individual's perception of crowding is positively and significantly related to their attachment to their community. In a community-focused event setting, the researchers conducted a total of 283 on-site interviews and 184 follow-up surveys. Results indicated that for individuals that bear positive feelings towards the community, crowding at the festival is not a matter of concern. Instead, people hold a positive perception of large crowds and the physical setting actually added to their enjoyment of experience. The finding corroborated that of Mowen et al. (1998), which also noted a positive relationship between level of place attachment/activity involvement and overall assessment of experience.

In fact, Iso-Ahola (1980) stressed that crowding "in itself is neither good nor bad" and it is most important to consider the perfect match "between the expected and achieved level of social interaction". It's also acknowledged (Walden, Nelson, & Smith, 1981) that satisfaction depends on reaching a balance between desired interpersonal interaction and privacy. In the context of a restaurant setting, Noone and Mattila (2009) tested the crowding-service quality relationship among a pool of 198 undergraduate students. The results revealed that the relationship of crowding and service quality is moderated by consumption goals, utilitarian or hedonic. When the goal for a dining experience is utilitarian, service quality ratings are found to be lower when the restaurant is crowded. When the customer's goal is hedonic in nature, service quality ratings are higher in a crowded restaurant than a non-crowded restaurant.

These arguments resonate with the notion that by nature the perception of crowding is individual-based (Eroglu et al., 2005). Two different customers in the same shopping environment are likely to hold different perceptions of the crowding level as a result of their personal characteristics or situational factors. Theoretically, crowding occurs to one when the actual level of social contact exceeds what is desired. But the occurrence of such feeling does not necessarily lead a bad experience. Additionally, different people may perceive crowding distinctively due to variance in individual preferences, such as tolerance of privacy. In turn, the personalized variance may influence overall satisfaction of the experience as well. We should also account for the fact that perceptions of crowding can be culture dependent in addition to being context dependent. In a different cultural setting, people may seek different outcomes, such as high level of physical density. In addition to the cultural factor, one's normal living environment may also be a contributing factor in a visitor's assessment of crowding.

Privacy

Defined as an "interpersonal boundary-control process" that aims to regulate social interaction at an optimal level, privacy is delineated as having two dimensions: desired privacy and achieved privacy (Altman, 1975). Desired privacy is the ideal level of privacy an individual would like to obtain while achieved privacy is the actual level of privacy an individual actually perceives. When desired and achieved privacy match, it is considered a successful control of privacy regulation (Chemers & Altman, 1977). If achieved privacy is more than desired, a person may feel socially isolated or lonely. Or if achieved privacy is less than desired—a person may

feel intruded on. Neither case can be called a successful social interaction. Westin (1970) proposed four dimensions of privacy, each with corresponding functions. They are solitude, intimacy, anonymity, and reserve. Solitude is the desire of staying alone without observation by other people. In such state, an individual is separated from others. In intimacy, two or more people interact closely with each other but such interaction remains unobserved and undisturbed by others. In the state of anonymity, an individual is in public places, with presence of others. But his/her presence is without identification and surveillance. Reserve suggests the need to control information receiving and giving while communicating with others, such as withholding information perceived as personal.

Privacy is closely related to crowding. Iso-Ahola (1980) contended that such desired level of privacy requires a person to both “avoid and pursue crowds” to reach the optimal level. Crowding is felt when more than desired social interaction is produced and an individual obtains less privacy than is desired (Altman, 1975). Stated alternately, crowding occurs when the desired privacy exceeds achieved privacy, which signals an unsuccessful interactional control (Walden et al., 1981). Therefore, privacy may potentially affect crowding and lead to subjective feeling of overcrowding, thereby contributing to a low level of satisfaction. Due to different levels of privacy desired by visitors, their judgment on experience from the perspective of crowding may vary.

Privacy is also associated with culture as the latter is one of the factors to help regulate the former to its optimum. Admittedly, the term of privacy is a culturally universal concept as all people regulate their accessibility to others. However, privacy could have unique expression and/or awareness level in different cultures. According to Chemers and Altman (1977), culture influences privacy in two ways. First, the mechanisms used to regulate privacy vary across culture. In every culture there exists a behavioral mix, such as norms, customs, and interaction rules, so as to guide responses to various social instances. How to probe and how close one should be to his/her neighbors are examples of such. Cross-culturally, sets of behavior codes may share common grounds but are not homogenous. The desired level of privacy may vary depending on cultural factors. The contact cultures (e.g. Middle Eastern, Latin Americans, and Mediterranean peoples) maintain higher tolerance for interpersonal distances as opposed to noncontact cultures (e.g. German, British, North American) (Hall, 1959). Therefore, it is possible that while in same physical environment, distance for social interaction are quite natural for some people, but individuals of a different culture may feel subtly uncomfortable and wish to withdraw. Kaya & Weber (2003) explored differences in perception of crowding and privacy between American and Turkish freshmen who live in similar residence halls. The findings demonstrated that American students have higher privacy needs in their rooms than their Turkish counterparts. The authors explained this from a cultural perspective. American value individuality and autonomy and therefore prefer greater privacy while Turkish society place emphasis on strong family ties and desire low levels of privacy.

RESEARCH HYPOTHESIS

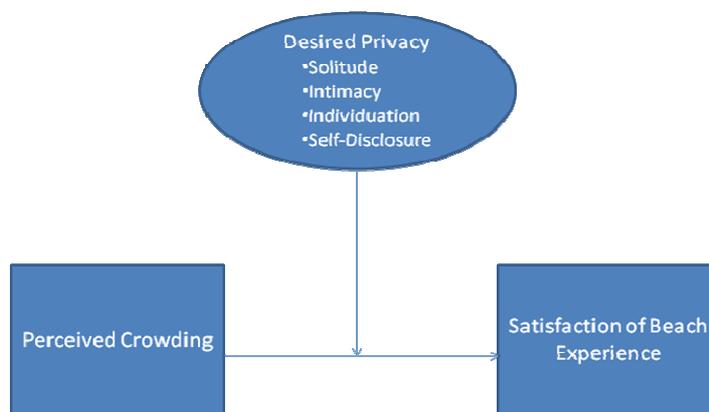
Despite the numerous studies of the phenomenon of crowding in outdoor recreation, to the best of our knowledge no study has investigated the role of privacy in the relationship of perceived crowding and experience satisfaction, especially within the context of a beachfront setting in non-western culture. Consequently, this study seeks to examine the influence of desired privacy on such relationship and to determine if there's a moderating effect of desired privacy.

Figure 1 depicts the proposed model of this research. The specific hypotheses of the study are two-fold:

H1: Perceived crowding will influence satisfaction of experience at a beach setting. More specifically, perceived crowding will have a circumstantial effect on satisfaction of experience.

H2: Desired privacy moderates the crowing-satisfaction relationship in a beach context. More specifically, when desired privacy level is high, satisfaction will be lower when the beach is perceived as crowded. Conversely, when desired privacy is low, satisfaction will be higher when the beach is not crowded.

Figure 1: Proposed Model



METHODOLOGY

Instrumentation

The research instrument developed for data gathering was designed as a questionnaire and consisted of scales to measure individual's perception of crowding at a beach environment and desired level of privacy. Our questionnaire comprised of four major sections, including 1) general demographic background and trip characteristics of visitors; 2) perceived crowding measures; 3) perceived privacy measures; and 4) experience satisfaction variables.

Perceived Crowding-The instruments used to measure perceived crowding were originally developed by Anderson, Kerstetter and Graefe (1998) as part of an investigation of perception of crowding in a festival setting. Proven to be reliable (Wickham & Kerstetter, 2000), this perceived crowding scale will be adapted in this study. Respondents will be asked to answer to five measurement items on a 7-point scale with 1 being very negative response and 7 being very positive response. The measurement items are: The number of people at the beach was 1 (larger than expected) to 7 (smaller than expected); the other visitors present at the beach 1 (detracted from my experience) to 7 (added to my experience); the sights, sounds, and movements on the beach were 1 (unpleasant) to 7 (pleasant); the beach would have been enjoyable with 1 (far fewer people) to 7 (far more people); the lines for food, information, and other services were 1 (intolerable) to 7 (tolerable). Each item was scored such that a higher score suggests more positive perception of crowding. In other words, the higher the score, the individual perceives the environment as less crowded, and vice versa. The total score could range from 5 (most negative perception) to 35 (most positive perception).

Desired Privacy-In order to measure privacy, this study adopted the instruments developed by Smith and Swanson (1979), who conceptualized privacy in four states: solitude, intimacy, individuation and self-disclosure. The reliability and validity of the scales have been supported and they were adapted into the tourism setting for the purpose of our research. The instruments contain four dimensions: Solitude (“Being able to get away by myself” and “Having a place where I can be alone”), Intimacy (“Talking with my friends without other people trying to listen in on what we are saying” and “Enjoying the company of others in private”), Individuation (“Being known by my name not by a number” and “Wearing my hair the way I want to”), and Self-disclosure (“Letting others know my true feelings” and “Talking about my friends and family”). Respondents were asked to rate their desired privacy on a scale from 1 (not at all important) to 4 (extremely important). For each questionnaire, scores for each item will be summed up. The higher the score, the greater the level of one’s desired privacy is.

Site selection

This study was carried out in a beach setting. The actual research sites are two public beaches, Gold beach and Shanhaitian beach, in Rizhao, China. To control physical factors, the two beaches chosen are both free of charge, have similar environmental features and offer comparable recreational facilities. Unlike its neighboring seaside city Qingdao, which is a world renowned destination, Rizhao is less known and mainly accommodate domestic visitors.

Procedure

Initially constructed in English, the instrument was translated into Chinese by one of the bilingual researchers. To validate the Chinese version, another bilingual researcher back-translated the survey instrument into English. This back-translation procedure can help ensure an accurate prose translation that was decentered from a literal English language translation. (Brislin, 1980; Werner & Campbell, 1970).

Data was gathered through on-site self-administered surveys at the two above mentioned beaches. Collection of data began during the second week of June 2011 and was completed within three weeks. The visitors were approached individually on site by two trained researchers

and participation was on a voluntary basis. The online interviews occurred at different times (10:00am-12:00pm and 14:00pm-17:00pm) during the day and were conducted on both weekdays and weekends over the three-week period to mitigate sampling bias.

PRELIMINARY RESULTS

The procedure yielded a total sample of 253 beach visitors. Of the total visitors participated, 92 were males and 161 were females. People aged 20 to 24 years old represented the highest percent of sample (33.6%), followed by groups 25-29(18.2%), and 35-39(10.7%) . Most of the respondents have bachelor's degree (46.2 %), 28.1% have associate degree and 15.4% earned Master's degree. In terms of occupation, 33.6% are students, followed by sales (15.8%), professional/technical (13.4) and self-employed (10.7%). Appropriate statistical methods will be applied depending on the nature of variables and the relationships under investigation. One possible approach would be multigroup comparison using invariance analysis. Detailed results and discussions will be fully elaborated in the full paper version.

EXPECTED CONTRIBUTION

The current study aims to examine the relationship between perception of crowding and overall experience in a beach setting and explore the moderating role of desired privacy on such relationship. Despite extensive literature on crowding in natural park settings, there is limited literature on this theoretical construct in the tourism context. The primary goal of this study was to further the understanding of the perceived crowding in the overall visitor experience at a beach setting, particularly in relation to desired level of privacy. This study suggests an interesting research direction as it moves existing notions of crowding and privacy to new realms. Since crowding is an experiential construct, our finding will be of both theoretical and practical implications for future research on visitor experience.

Reference

- Altman, I. (1975). *The environment and social behavior*. Monterey, CA: Brooks/Cole.
- Altman, I., & Chemers, M. (1980). *Culture and environment*. Monterey, CA: Brooks/Cole.
- Brislin, R. W. (1983). Cross-cultural research in psychology. *Annual Review of Psychology*, 34, 363-400.
- Anderson, M., Kerstetter, D. L. and Graefe, A. R. (1998). The effects of festival attributes upon perceptions of crowding. In *Proceedings of the 1997 Northeastern Recreation Research Symposium*. Radnor, PA: USDA Forest Service.
- Chemers, M.T., Altman, I. (1977). Use and perception of the environment: cultural and developmental processes. In *Children, Nature, and the Urban Environment: Proceedings of a Symposium*. Upper Darby, PA: USDA Forest Service.
- Davenport, T., & Beck, J. (2002). *The attention economy: Understanding the new currency of business*. Boston, MA: Harvard Business School Press.
- Eroglu, S. A., & Machleit, K.A. (1990). An Empirical Study of Retail Crowding: Antecedents and Consequences. *Journal of Retailing*, 66 (2), 201-220.
- Eroglu, S. A., Machleit, K. A., & Feldman Barr, T. (2005). Perceived retail crowding and shopping satisfaction: The role of shopping values. *Journal of Business Research*, 58(8), 1146–1153.
- Feughtwang, S. (2002). Reflections on privacy in China. In B. S. McDougall & A. Hansson (Eds.), *Chinese Concepts of Privacy* (211-230). Leiden, NLD: Brill Academic Publishers.
- Fleishman, L., Feitelson, E., & Salomon, I. (2004). The role of cultural and demographic diversity in crowding perception: Evidence from nature reserves in Israel. *Tourism Analysis*, 9, 23-40.
- Getz, D (1992). *Festivals, special events, and tourism*. New York: Van Nostrand Reinhold.
- Hall, E. *The silent language*. Greenwich, CT: Premier Books, 1959.
- Harrell, G.D., Hutt, M.D., & Anderson, J.C. (1980). Path analysis of buyer behavior under conditions of crowding. *Journal of Marketing Research*, 17(1), 45-51.
- Hsu, Y., Li, C., & Chuang, O. (2007). Encounters, norms and perceived crowding of hikers in a non-North American backcountry recreational context. *Forest, Snow and Landscape Research*, 81 (1/2), 99-108.
- Hui, M.K. & Bateson, J.E.G. (1991). Perceived Control and the Effects of Crowding and Consumer Choice on the Service Experience. *Journal of Consumer Research*. 18(9), 174-84.
- Iso-Ahola, S. E. (1980). *The Social Psychology of Leisure and Recreation*. Dubuque, IA: Brown.
- Kaya, N., & Weber, M. J. (2003). Cross-cultural differences in the perception of crowding and privacy regulation: American and Turkish students. *Journal of Environmental Psychology*, 23, 301–309.
- Machleit, K. A., Kellaris, J. J., & Eroglu, S. A. (1994). Human and spatial dimensions of crowding perceptions in retail environments: A note on their measurement and effect on shoppers' satisfaction. *Marketing Letters*, 5, 183–194.
- McDougall, B.S. & Hansson, A. (2002). *Chinese Concepts of Privacy*. Leiden, NLD: Brill Academic Publishers.
- Mowen, A., Graefe, A., & Virden, R. (1998). A typology of place attachment and activity involvement. In H. Vogelsong (Ed.), *Proceedings of the 1997 Northeastern Recreation*

- Research Symposium* (pp. 89–92). USDA Forest Service Gen. Tech. Rep. NE-241. Radnor, PA: Northeastern Forest Experiment Station.
- Noone, B. M., & Mattila, A. S. (2009). Restaurant Crowding and Perceptions of Service Quality: The Role of Consumption Goals and Attributions. *Journal of Foodservice Business Research*, 12(4), 331-343.
- Schmitt, B. (1999). *Experiential marketing*. New York, NY: The Free Press.
- Schmidt, D. E., & Keating, J. P. (1979). Human crowding and personal control: An integration of the research. *Psychological Bulletin*, 86(4), 680-700.
- Shelby, B. (1980). Crowding Models for Backcountry Recreation. *Land Economics*, 56(1), 43-55.
- Smith, D. E. & Swanson, R. M. (1979). Privacy and corrections: A social learning approach. *Criminal Justice and Behavior*. 6. 339-357
- Stewart, W. P., & Cole, D. N. (2001). Number of encounters and experience quality in Grand Canyon backcountry: consistently negative and weak relationships. *Journal of Leisure Research*, 33(1), 106–120.
- Stokols, D. (1972). On the Distinction between Density and Crowding: Some Implications for Future Research. *Psychological Review*, 79(3), 275-278.
- Vaske, J. J., Donnelly, M. P., & Lehto, X. (2002). *Visitor crowding and normative tolerances at congested areas of Rocky Mountain National Park*. (HDRNU Rep. No, 50). Fort Collins, CO: Colorado State University.
- Vaske, J. J., & Shelby, L. B. (2008). Crowding as a descriptive indicator and an evaluative standard: Results from 30 years of research. *Leisure Sciences*, 30, 111–126.
- Walden, T. A., Nelson, P. A., & Smith, D. E. (1981). Crowding, privacy and coping. *Environment and Behavior*, 13(2), 205–224.
- Walls, A., Okumus, F., Wang, Y. & Kwun, D. (2011). Understanding the Consumer Experience: An Exploratory Study of Luxury Hotels. *Journal of Hospitality Marketing & Management*, 20(2), 166-197.
- Werner, O., & Campbell, D. T. (1970). Translating, working through interpreters, and the problem of decentering. In R. Naroll & R. Cohen (Eds.), *A handbook of cultural anthropology* (pp. 398-419). New York: American Museum of Natural History.
- Westin, A. F. (1970). *Privacy and Freedom*. New York: Atheneum.
- Wickham, T.D., & Kerstetter, D. L. (2000). The relationship between place attachment and crowding in an event setting. *Event Management*, 6, 167-174.

A COMPARATIVE ANALYSIS OF EVENT ATTENDEES' SPENDING BEHAVIORS AND SATISFACTION BY VISITOR TYPES

Wei Wang
Department of Recreation, Park, and Tourism Studies
Indiana University, USA

Shu Cole
Department of Recreation, Park, and Tourism Studies
Indiana University, USA

ABSTRACT

The purpose of this study is to investigate different spending behaviors and satisfaction levels among visitors attending three types of events-festivals, sporting events, and conferences. Data was collected through interviews among the event attendees and 536 surveys were usable for the analyses. One-way ANOVA test was employed to test differences on types of information sources utilized for trip planning and trip expenditures. Significant differences existed among three types of visitors on information sources used during planning. The ANOVA test also indicated that there were significant differences among the three types of visitors on all satisfaction levels. Practical implications are provided for managerial purposes.

KEYWORDS: Spending behaviors; Satisfaction; Conferences; Sporting events; Festivals.

INTRODUCTION

The success of events is crucial to local tourism development and market expansion (Getz, 2008). Event tourism is valuable because events “expand the traditional tourist season”, “spread tourist demand more widely throughout the area”, “attract foreign visitors”, and “create a favorable image for a destination” (Getz, 1989, p. 134). The importance of event tourism has been addressed (Prentice & Andersen, 2003), and a body of research illustrating the impacts of event tourism has emerged (Long & Perdue, 1990; Faulkner, 2003; Chalip, 2006). Together with destination management, event tourism has been studied in discussions as varied as customer benefits, community development, organization and partner goals, environment, and economy (Getz, 1997). Whereas a variety of topics were involved, Getz (2005) identified seven types of planned events which constitute the planned event sector; of all types of planned events, three event types – business events, sporting events, and festivals and cultural celebrations – have been most frequently studied in event tourism development.

Despite growing interest in event tourism, research on how visitors behave differently in these three types of event is surprisingly limited. Much research on event tourism has focused on identifying tourists' motivation, activities, and impact to community in a single type of event. To better understand visitors to different events, the purpose of this study was to compare attendees' behaviors to three types of event: festivals, sporting events, and conferences. Specifically, we empirically examined the demographic, trip expenditure, and satisfaction differences among attendees to these three types of events.

LITERATURE REVIEW

A review of research on event tourism indicated that the significance of event tourism has been emphasized and events have raised awareness within the context of tourism and economic development (Connell & Page, 2010). Among the most popular event tourism research are economic impact studies (Crompton & McKay, 1994; Crompton, 1999; O'Sullivan & Jackson, 2002), which are commonly assessed by tourist expenditures (Long & Perdue, 1990; Preuss, 2005). Perhaps the most common motive to measure visitor expenditure has been to identify 'heavy spenders'. For example, Mok and Iverson's (2000) study of Taiwanese tourists who traveled to Guam found that heavy spender tourists tended to stay longer at a destination and were highly attracted to shopping when compared to light and medium spenders.

However, to better understand visitors' spending behavior, it is necessary to examine the difference on travel expenditure based on the purpose of travel. In this study we explicitly compared the differences in travel expenditures between three travel groups: those who attended festivals, sporting events, and conferences. Similar attempts can be found in previous literature. Laesser & Crouch (2006) proposed a conceptual model and argued that travel expenditure could be explained by five parameters: the country of residence of traveler, the reason for travel, travel influences, type of accommodation, and group tour participation. The results revealed that visitors who traveled to attend conferences and visit rural areas were associated with higher spending. A remarkable concern was also addressed in the study. All types of events, be they sporting or other types of festivals, might attract a large volume of visitors but were generally associated with rather less spending.

The literature on event satisfaction of different visitor types has been sparse. Mohr, Backman, Gahan, and Backman (1993) conducted a study on the relationship between repeat visitation and satisfaction in special events. They found that repeat visitors had higher satisfaction than first-time visitors. In their study, Anwar and Sohail (2004) measured the relationship between repeat visitors and first time visitors on their overall satisfaction levels. The responses showed that first time visitors felt extremely satisfied about their trip experience compared to the repeat visitors, and they would definitely visit the destination again. In contrast, O'Neil, Getz, and Carlsen (1999) attempted to measure the relationship between customer satisfaction and repeat visitation at an international event in Western Australia. The study did not find a significant relationship between repeat visitation and satisfaction. Lee, Lee, and Wicks (2003) identified four clustered segments for six motivation factors and examined visitor satisfaction. However, the study revealed that visitor types (domestic visitors and foreign visitors) did not act as an interaction variable for the effect of motivation on overall satisfaction. To further examine the relationship between satisfaction and visitor types, this study attempts to examine if attendees to festivals, sporting events, and conferences exhibit different levels of satisfaction.

METHOD

Data were collected through onsite interviews in a midwestern town with a population of 70,000. Participants in this study were attendees to 3 local festivals, 2 sporting events, and 3 conferences (Table 1). A total of 1547 visitors were intercepted at the various venues and 536 surveys were usable for the analyses (response rate of 34.6%): festivals (n=185), sporting events (n=198), and conferences (n=153). Detailed description about the events were listed in Table 2.

The questionnaire collected information on demographic variables (i.e., age, gender, education level, employment status, annual income), area of origin, purpose of the trip, trip characteristics (i.e., number of previous visits, travel parties, length of stay, expenditures,

activities engaged, information sources), and their levels of satisfaction with the trip experience. Likert-type scale is used to evaluate their level of satisfaction toward each item, with 1 representing the most satisfied and 5 representing the least satisfied.

Table 1. Locations, Dates, and Number of Surveys Collected at Each Event.

<i>Event</i>	<i>Data collection dates</i>	<i>Number of usable surveys</i>
Art Fair on the Square	June 20 th , 2009	52
Taste of Bloomington	June 20 th , 2009	64
Knights of Columbus (Convention Center)	July 12 th , 2009	11
Adidas May Classic	July 13 th & 14 th , 2009	95
ASA National Softball Tournament	July 30 th , 2009	103
Lotus World Music and Art Festival	September 25 th & 26 th ,	69
ISSOTL Conference	October 23 rd & 24 th , 2009	106
Men and Women of Color Leadership	November 13 th , 2009	36
Total Number of Collection Dates	11	
Total Number of Useable Surveys		536

Table 2. Description of Events Where Data Was Collect.

<i>Event</i>	<i>Description</i>
Art Fair on the Square	An all-day event held annually in June in conjunction with the Taste of Bloomington. It is sponsored by the Bloomington Area Arts Council and works to bring in visual artists and craftspeople from the local and regional community.
Taste of Bloomington	An annual celebration of Bloomington's wide variety of unique dining experiences as well as music and other festivities. It is held in the downtown area in conjunction with the Art Fair on the Square.
Knights of Columbus (Convention Center)	An Indiana chapter of the Knights of Columbus held a two-day summer meeting in Bloomington. KOC is a Catholic fraternal service organization.
Adidas May Classic	The Adidas May Classic is a national youth basketball prep and scouting event that brings in individuals and teams from all over the country.
ASA National Softball Tournament	The Amateur Softball Association of America (ASA) held the 2009 Girls B 10-under Fast-pitch Northern National Softball Tournament and is to host the USA/ASA Girls 12-U Class A Fast Pitch National Championship in 2010 that is expected to attract approximately 80 teams and more than 2000 visitors to the community.
Lotus World Music and Art Festival	An annual fall event that is organized and sponsored by the Lotus Education and Arts Foundation (LEAF) that brings in international musicians and artists.

ISSOTL Conference	The International Society for the Scholarship of Teaching and Learning held their 2009 conference at the Indiana University Alumni Hall. The goal of the organization is to foster inquiry and disseminate findings about what improves and articulates post-secondary learning and teaching.
Men and Women of Color Leadership Conference	The 1st annual Men and Women of Color Leadership Conference held at the Indiana University Kelley School of Business. Their mission is to promote African American, Asian American, Latino/a and Native American men and women by empowering them with the skills and knowledge needed to foster academic success, establish a support network, support the goal of graduation, and improve personal achievement by influencing leadership through representing unity and a commitment to collective betterment of humankind.

RESULTS

The analysis of data was composed of three parts. First, in order to examine the difference between the three groups in terms of their demographic variables, *chi-square* tests were employed. Group differences were found in all demographic variables, including gender ($\chi^2=11.58, p=0.003$), education ($\chi^2=128.12, p=0.000$), occupation ($\chi^2=80.9, p=0.000$), and household income in 2008 ($\chi^2=28.419, p=0.005$) (Table 3). More female participants attended sporting events (129, 66%) and festivals (100, 57%), and more male participants attended conferences (80, 52%). Results showed that people who attended conferences had the highest education background (81.7% of them had a college or higher degree), and people who attended sporting events had the lowest education background (half of them had a degree with some college or less). Full-time employees were dominant in all groups (335, 64%). However, more students attended conferences (34, 22.2%), and more retired people attended festivals (30, 17.2%) and sporting events (23, 11.7%). In general, conference attendees were the youngest group (mean=40.7 years old), and they were more likely to be first time visitors (80, 52.6%) than visitors in festivals (18, 10%) and sporting events (89, 45.2%).

Table 3. Demographic Information.

<i>Demographic profile</i>	<i>Festival</i>	<i>Sports</i>	<i>Conference</i>	<i>Total</i>	χ^2	<i>Sig.</i>
Gender					11.58	0.003*
Female	100 (57%)	129 (66%)	73 (48%)	302		
Male	76 (43%)	67 (34%)	80 (52%)	223		
Total	176	196	153	525		
Education					128.12	0.000*
Grade school	1 (.6%)	5 (2.6%)	1 (.7%)	7(1.3%)		
High school diploma	6 (3.4%)	32(16.4%)	4 (2.6%)	42 (8%)		
Vocational school	4 (2.3%)	7 (3.6%)	4 (2.6%)	15(2.9%)		
Some college	25 (14.4%)	46(23.6%)	19(12.4%)	90(17.2%)		
Four year college	79 (45.4%)	73(37.4%)	25(16.3%)	177(33.9%)		
Graduate School	47 (27%)	29(14.9%)	95(62.1%)	171(32.8%)		

Professional school	12 (6.9%)	3(1.5%)	5(3.3%)	20 (3.8%)		
Total	174	195	153	522		
Occupation					80.896	0.000*
Employed Full Time	112(64.4%)	123(62.8%)	100(65.4%)	335		
Retired	30(17.2%)	23(11.7%)	6 (3.9%)	59		
Employed Part Time	9(5.2%)	13(6.6%)	11 (7.2%)	33		
Homemaker	2 (1.1%)	16(8.2%)	0 (0%)	18		
Unemployed	4 (2.3%)	4(2%)	2 (1.3%)	10		
Student	12 (6.9%)	5 (2.6%)	34(22.2%)	51		
Other	5 (2.9%)	12 (6.1%)	0	17		
Total	174	196	153	523		
Household Income					28.419	0.005*
0-29,999	20 (12.9%)	9 (5.5%)	19(14.8%)	48		
30,000-59,999	48 (31%)	25(15.2%)	28(21.9%)	101		
60,000-99,999	44 (28.4%)	54(32.9%)	39(30.5%)	137		
100,000-129,000	20(12.9%)	33(20.1%)	24(18.8%)	77		
130,000-159,999	9 (5.8%)	21(12.8%)	6(4.7%)	36		
160,000-199,999	6(3.9%)	12(7.3%)	6(4.7%)	24		
200,000 and up	8 (5.2%)	10(6.1%)	6(4.7%)	24		
Total	155	164	128	447		
					<i>F</i>	<i>P</i>
Age	47.65	46.88	40.73	45.34	13.22	0.000*

The differences between various information sources were examined among the three visitor groups (Table 4). Significant differences existed among three types of visitors on items such as previous experience ($\chi^2=79.03$, $p=0.000$), advertisement on print media ($\chi^2=27.062$, $p=0.000$), and advertisement on TV ($\chi^2=8.749$, $p=0.013$). One third festival attendees (84, 32.7%) reported that they made travel decisions based on previous experience. One quarter of sporting event attendees (50, 24.2%) used information on the internet. Three of ten conference attendees (51, 29.3%) were influenced by recommendation from other people. The results showed that depending on the event type, visitors acquired information from different channels to make travel choices.

Table 4: Information Sources.

<i>Information sources</i>	<i>Festival</i>	<i>Sports</i>	<i>Conference</i>	<i>Total</i>	χ^2	<i>Sig.</i>
Previous experience	84 (32.7%)	17(8.2%)	18(10.3%)	119	79.028	0.000*
Brochures	9 (3.5%)	3(1.4%)	3(1.7%)	15	3.669	0.16
Travel agency	0	3 (1.4%)	3(1.7%)	6	3.556	0.169
Advs. on print	17(6.6%)	0	1(0.6%)	18	27.062	0.000*
Advs. on TV	5 (1.9%)	0	0	5	8.749	0.013*
Guidebooks	2 (0.8%)	1(0.5%)	4(2.3%)	7	2.772	0.25
CVB	1(0.4%)	3(1.4%)	1(0.6%)	5	1.552	0.46
Billboards	4 (1.6%)	0	1(0.6%)	5	4.465	0.107

Recommendation	61(23.7%)	41(19.8%)	51(29.3%)	153	5.116	0.077
Internet	53 (20.6%)	50(24.2%)	35(20.1%)	138	1.609	0.447
Other sources	21(8.2%)	89(43%)	57(32.8%)	167	73.536	0.000*
Total	257 (100%)	207(100%)	174(100%)	638		

Second, an one-way ANOVA test was employed to test differences on trip expenditures (Table 5). Significant differences were found among different types of expenditures, including accommodation ($F=5.545, p=0.004$), food ($F=12.909, p=0.000$), and other expenditures ($F=6.005, p=0.003$). No significant difference was found on retail expenditure ($F=2.941, p=0.054$) between groups. In general, visitors to sporting event spent the most on the majority of expenditure items including lodging, food, and others, whereas festival attendees spent the least in events. More specifically, sporting event attendees spent the most on accommodation (mean=\$848.46), followed by conference attendees (mean=\$626.8) and festival attendees (mean=\$276.38) for the entire trip. Festival visitors spent the most on retail (mean=\$79.38), followed by sports attendees (mean=\$43.15) and conference attendees (mean=\$12.72).

Length of stay was measured in number of nights stayed in the region. On average, people stayed significantly shorter if they came to attend festivals (mean=1.7 nights, $F= 25.311, p=0.000$). No difference was identified between those who attended conference (mean=3.39 nights) and sporting events (mean=3.27 nights).

Table 5. Trip Expenditures.

<i>Trip Expenditures</i>	<i>Festival</i>	<i>Sports</i>	<i>Conference</i>	<i>Average</i>	<i>F Value</i>	<i>P-Value</i>
Duration of stay	1.7	3.27	3.39	2.79	25.311	0.000*
Lodging	276.38	848.46	626.8	695.93	5.545	0.004*
Food	126.8	301.51	206.35	216.28	12.909	0.000*
Retail	79.38	43.15	12.72	46.28	2.941	0.054
Others	34.83	89.71	34.34	56.17	6.005	0.003*

Third, the ANOVA test indicated that there were significant differences on all satisfaction levels, including accommodation ($F=3.208, p=0.041$), attraction ($F=8.896, p=0.000$), restaurants ($F=7.417, p=0.001$), shopping ($F=5.122, p=0.006$), overall value ($F=13.848, p=0.000$), and overall experience ($F=14.686, p=0.000$) (Table 6). In general, visitors to local festivals and events reported a significantly higher level of satisfaction on all items than other groups. People tended to be more content with restaurants and overall experiences, whereas they were less likely to give high evaluation scores to the shopping experience between groups.

Table 6. Satisfaction Level.

<i>Satisfaction Level</i>	<i>Festival</i>	<i>Sports</i>	<i>Conference</i>	<i>Average</i>	<i>F Value</i>	<i>P-Value</i>
Accommodation	1.4	1.64	1.55	1.54	3.208	0.041*
Attraction	1.48	1.86	1.66	1.67	8.896	0.000*
Restaurants	1.32	1.62	1.56	1.5	7.417	0.001*
Shopping	1.6	1.84	1.93	1.77	5.122	0.006*
Overall Value	1.42	1.81	1.59	1.62	13.848	0.000*
Overall Experience	1.32	1.69	1.51	1.51	14.686	0.000*

DISCUSSION

In this paper we found that visitors participating in different types of events had distinct demographic and behavioral characteristics. Festival attendees were more likely to use previous experience to make travel decisions. Although tending to stay shorter and spent less on the trip, visitors in festival events were more satisfied with the entire trip than other types of visitor. As a consequence, festival attendees had more repeat visitors than those who attended sporting events and conferences. Visitors in sporting events and conferences both tended to stay longer and spent more on the trip. They acquired information about the destination through the internet or recommendation from others. This important information could be helpful for marketers when making strategic planning decisions on how to effectively position the destination. The city tourism bureau could utilize local and culturally-related festivals and events to attract tourists from neighborhood communities. However, sporting events and conferences could also facilitate cash flow and boost the local economy, even if temporary. This study also contributes to current literature on the comparison of different types of visitors in terms of their demographic and behavioral features in multiple event settings. Further studies should investigate visitors' perceptions toward the destination and evaluation of marketing image.

A word of caution: first, due to the demographic difference between type of visitors, it is reasonable to believe that visitors would have different goals and needs. Therefore, they may exhibit different behaviors and show different levels of satisfaction toward the trip. Second, we did not identify a causal effect between expenditure and satisfaction level. Therefore, it is unwise to conclude that people who were more satisfied with the trip would revisit the destination. Marketers should be cautious when interpreting the results on satisfaction and visitors' future behaviors.

REFERENCES

- Breen, H., Bull, A., & Walo, M. (2001). A comparison of survey methods to estimate visitor expenditure at a local event. *Tourism Management*, 22, 473-479.
- Chalip, L. (2006). Towards social leverage of sport events. *Journal of Sport & Tourism*, 11(2), 109-127.
- Connell, J., & Page, S. (2010). *Event tourism: Critical concept in tourism*. New York, NY: Routledge.
- Crompton, J. L., & McKay, S. L. (1994). Measuring the economic impact of festivals and events: Some myths, misapplications and ethical dilemmas. *Festival Management and Event Tourism*, 2(1), 33-43.
- Crompton, J. L. (1999). *Measuring the economic impact of visitors to sports tournaments and special events*. Ashburn, Virginia: Division of Professional Services, National Recreation and Park Association.
- Faulkner, H. (2003). Evaluating the tourism impacts of hallmark events. In H. Faulkner, *Progressing Tourism Research* (93-113). Church Point, Australia: Channel View Publications.
- Frechtling, D. C. (2006). An assessment of visitor expenditure methods and models. *Journal of Travel Research*, 45(1), 26-35.
- Getz, D. (1989). Special events: Defining the product. *Tourism Management*, 10(2), 125-137.
- Getz, D. (1991). *Festivals, special events, and tourism*. New York: Van Nostrand Reinhold.
- Getz, D. (2005). *Event Management and Event Tourism* (2nd ed.). New York: Cognizant.
- Getz, D. (2008). Event tourism: Definition, evolution, and research. *Tourism Management*, 29, 403-428.
- Laesser, C., & Crouch, G. I. (2006). Segmenting markets by travel expenditure patterns: The case of international visitors to Australia. *Journal of Travel Research*, 44, 397-406.
- Mok, C., & Iverson, T. J. (2000). Expenditure-based segmentation: Taiwanese tourists to Guam. *Tourism Management*, 21, 299-305.
- Mohr, K., Backman, K. F., Gahan, L. W., & Backman, S. J. (1993). An investigation of festival motivations and event satisfaction by visitor type. *Festival Management and Event Tourism*, 1(3), 89-97.
- O'Neill, M., Getz, D., and Carlsen, J. (1999). Evaluation of Service Quality at Events: The 1998 Coca-Cola Masters Surfing Event at Margaret River, Western Australia. *Managing Service Quality*, 9 (3), 158-166.
- O'Sullivan, D., & Jackson, M. J. (2002). Festival tourism: A contributor to sustainable local economic development? *Journal of Sustainable Tourism*, 10(4), 325-342.
- Prentice, R., & Andersen, V. (2003). Festival as creative destination. *Annals of Tourism Research*, 30(1), p. 7-30.
- Preuss, H. (2005). The economic impact of visitors at major multi-sport events. *European Sport management Quarterly*, 5(3), 281-302.

HOTEL MANAGERS ATTITUDES TOWARD ENVIRONMENTAL SUSTAINABILITY PRACTICES

Sivika SenyanuapaP
Rosen College of Hospitality Management
University of Central Florida, USA

Po-Ju Chen
Rosen College of Hospitality Management
University of Central Florida, USA

Fevzi Okumus
Rosen College of Hospitality Management
University of Central Florida, USA

ABSTRACT

The purpose of this study was to examine hotel managers' attitudes toward environmental sustainability practices in Phuket, Thailand. The tourism industry in Phuket has been fast growing. Thus, sustainability has become increasingly important for this destination and will help preserve the local environment. Based on an in-depth literature review (Bohdanowicz, 2005; Gil, Jimenez & Lorento, 2001; Houdre, 2008; Kirk, 1998), a survey was designed and data was collected from 243 hotel managers in Phuket. This study identified three dimensions of hotel manager attitudes: *Operational Management*, *Social Obligation*, and *Sustainability Strategies and Policy*. The findings show that age and household income contribute to significant differences in environmental sustainability practices. The findings also show that higher income hotel managers older than 35 focus more on operational management and sustainability strategy and policy. Furthermore, results revealed significant differences in manager attitudes exist depending on hotel ownership and type. It was found that respondents who worked in chain hotels were more likely than those who worked in independent hotels to agree with sustainability strategy and policy. Previous studies found that chain hotel managers had more positive attitudes regarding environmental issues than did independent hotel managers (Bohdanowicz, 2005; Gil, Jimenez & Lorento, 2001). Bohdanowicz (2005) also found that European chain hoteliers focus on environmental policy more than their independent hotel counterparts; findings which are supported by this study. The research findings imply that hotel managers from chain hotels in Phuket believe that sustainability is important.

KEYWORDS: Sustainability, lodging management, attitudes, environmental lodging

INTRODUCTION

Lodging is one of the main sectors in the hospitality and tourism industry that creates a negative impact on the environment through the large consumption of water and energy, and pollution. Because of the size and rapid growth of the service sector, the effect of the hospitality industry on environmental sustainability is a growing concern.

Furthermore, many studies show that large companies benefit from adopting environmental management as part of their strategies (Bohdanowicz, 2005; Molina-Azorin; Claver-Cortes; Perira-Moliner & Tari, 2009). Typically, lodging makes a large “foot print” on tourism destinations. As such, lodging organizations should adopt environmentally responsible standards to reduce the negative impact on the environment and provide better quality service for hotel guests. Moreover, hotel manager attitudes are important because their attitudes are directly linked to hotel performance and the resulting environmental impact.

The purpose of this study is to examine hotel managers’ attitudes toward environmental sustainability practices in Phuket, Thailand. This study will also explore whether hotel managers’ attitudes are different depending on social-demographic characteristic. In addition, this study will identify whether hotel managers’ attitudes are different depending upon the hotel ownership and hotel type.

LITERATURE REVIEW

Sustainability is one of the most critical concepts driving a wide range of industries, including the hospitality industry, that may be able to mitigate environmental damage. Sustainability is a concept that has increasingly gained global acceptance. In 1983 the United Nations World Commission on Environment and Development published a study known as the Brundtland Report which defined sustainability as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Filho, 2000). Houdre (2008) stated “sustainable operation is the best strategy to ensure successful hotel operation” (p. 5). Within a hotel context, sustainability refers to environmental management techniques such as reusing guest linens, recycling waste material, and replacing incandescent lighting with compact fluorescent lamps (Houdre, 2008).

Today, many organizations view environmental management as applying theory as practice. Banerjee (2001) notes that the development of environmental strategy in an organization is mostly assigned to managers at the senior level. Thus, manager attitude is important in decision making. Kollmuss and Agyeman (2002) view attitude as “the enduring positive or negative feeling about some person, objective, or issues” (p. 242). Zutshi and Sohal (2004) stated top management leadership is important to organizational awareness and understanding environmental issues and environmental implementation.

Phuket is a tourist destination in South East Asia. The tourism industry is a fast growing industry in Phuket, Thailand. Accompanying this increased numbers of tourists has been an increase in the infrastructure, which has negatively impacted the surrounding environment. Thus, sustainability has become increasingly important for Phuket and will help preserve the local environment. The importance of sustainability for Phuket, Thailand, has been recognized by the Green Leaf Foundation. According to the Green Leaf Foundation, their Green Leaf Program focuses on facilitating the efficient use of energy, water, and other resources. Hotels earn a Green Leaf Certificate when they successfully complete the three step Green Leaf Program (consisting of a screening process, administering questionnaires and grading questionnaires). Upon completion,

hotels receive an award and a rating represented by a number of leaves reflecting environmental management and how efficiently they use resources

METHODOLOGY

The study instrument was developed using a two-phase process. The first phase employed a literature review to develop the survey questionnaire. During phase-two the study instrument was validated by 3 scholars and 12 hotel practitioners in Phuket, Thailand. The questionnaire was cross-translated between English and Thai language. Three hundred randomly selected hotel managers in Phuket were invited to participate in the study. Over the course of three visits, researchers obtained completed and useable questionnaires from 243 managers (an 81% response rate).

FINDINGS

The principal component factor analysis with Varimax rotation revealed three dimensions of hotel manager attitudes: *Operational Management*, *Social Obligation*, and *Sustainability Strategies and Policy*. The internal consistency of these three dimensions were adequate (Cronbach's alphas ranging from .77, .78 and .71 respectively). One way analysis of variance (ANOVA) was conducted to explore whether hotel managers' attitudes toward environmental sustainability practices differed depending on hotel type, hotel ownership and social demographic variables. This study classified hotels into two categories: hotel ownership and hotel type. Hotel ownership includes independent and chain hotels and hotel type includes upscale / luxury, mid-priced and budget hotels.

The findings show that age and household income contribute to significant differences in environmental sustainability practices. Findings also show that higher income hotel managers older than 35 focus more on operational management and sustainability strategy and policy. Furthermore, results revealed significant differences in manager attitudes exist depending on hotel ownership and type.

Respondents who worked in chain hotels were more likely than those who worked in independent hotels to agree with sustainability strategy and policy. Respondents who worked in upscale or mid-priced hotels also agreed with sustainability strategy and policy. Results of this study not only support previous study findings, but also provide additional insights for sustainability lodging management.

DISCUSSIONS

Social demographic variables have an influence when hotel managers decide to implement environmental sustainability practices in their hotels. The results of this study found age and household income are factors that influence hotel managers attitudes toward operational management and sustainability strategy and policy. Previous studies show that younger people tend to support environmental sustainability practices (Accury & Christiansan, 1990). Those studies differed from this study in that respondents who were older than 35 consider environmental management more important than their younger counterparts. Furthermore, higher income respondents focused on environmental management more than their lower income counterparts. Thus, it is apparent that age and

household income of Phuket hotel managers correlates to environmental sustainability practices.

Previous studies found that chain hotel managers had more positive attitudes regarding environmental issues than did independent hotel managers (Bohdanowicz, 2005; Gil, Jimenez & Lorento, 2001). Bohdanowicz (2005) also showed that European chain hoteliers focus on environmental policy more than their independent hotel counterparts; findings which are supported by this study. These findings imply that Phuket's chain hotel managers believe that sustainability strategy and policy are important.

Furthermore, hotel type is one of the factors that influence hotel managers to implement environmental sustainability practices. Previous studies found that three to five star hotels consider environmental management to be more important than their small hotel counterparts (Kirk, 1998); findings similar to this study which show upscale and mid-price hotel managers value sustainability strategy and policy more than budget hotel managers.

CONCLUSIONS

Environmental sustainability practices have not only gained acceptance in the Phuket hotel industry, but have become viewed by many hotels as essential to business strategy and policy. This study explored hotel managers' attitudes in an attempt to identify whether hotel manager attitudes differ by hotel ownership, hotel type and social demographic characteristics. This study concludes that age, household income, hotel ownership, and hotel type influence environmental sustainability practices.

REFERENCES

- Arcury, T.A., & Christianson, E.H. (1990). Environmental worldview in response to environmental problems: Kentucky 1984 and 1988 compared. *Environment Behavior*, 22, (3), 387-407.
- Banerjee, S. B. (2001). Managerial perceptions of corporate environmentalism: Interpretations from industry and strategic implications for organizations. *Journal of Management Studies*, 38(4), 489-513.
- Bohdanowicz, P. (2005). European hoteliers' environmental attitudes: Greening the business. *Cornell Hotel and Restaurant Administration Quarterly*, 46, 188-204.
- Filho, L. W. (2000). Dealing with misconceptions on the concept of sustainability. *International Journal of sustainability in Higher Education*, 1(1), 9-19.
- Gil, M. A., Jimenez, J. B., & Lorente J. C. (2001). An analysis of environmental management, organizational context and performance of Spanish hotels. *Omega*, 29, 457-471.

- Houdre, H. (2008). Sustainable Development in the hotel industry. *Cornell Industry Perspective*, 2, 4-20.
- Kirk, D. (1998). Attitude to environmental management held by a group of hotel managers in Edinburgh. *Hospitality Management*, 17, 33-47.
- Kollmuss, A., & Agyeman, J. (2002). Mind the gap: why do people act environmentally and what are the barriers to pro-environmental behavior? *Environmental Education Research*, 8(3), 239-259.
- Molina-Azorin, J. F., Claver-Cortes, E., Perira-Moliner, P., & Tari, J. J. (2009). Environmental practices and firms performance: An empirical analysis in the Spain hotel industry. *Journal of Cleaner Production*, 17, 516-524.
- Zutshi, A., & Dohal, A. S. (2004). Adoption and maintenance of environmental management systems. *Management of Environment Quality*, 15(4), 399-419.

ART AND HOSPITALITY – INCORPORATING WAX CRAYONS AND DRAWING PAPER IN ASSESSING STUDENT PERCEPTION OF THE HOSPITALITY SECTOR

Michael M. G. Scantlebury
Department of Hospitality and Tourism Management
Grand Valley State University, USA

And

Erin Pruitt
Department of Hospitality and Tourism Management
Grand Valley State University, USA

ABSTRACT

This poster presentation reports on a research project that is in progress. The project is part of an innovative and creative teaching initiative to assess student learning and changes in their perception of hospitality and tourism. Seventy three, first year students in their first hospitality management course on their first day of classes were provided with a blank 8.5 inch by 11 inch sheet of paper and a five-pack of Crayola wax crayons. They were asked to draw their perception of hospitality. This provides a benchmark against which the end of semester drawing can be compared. To date the first part of this project has been conducted with students taking this course in Fall 2011. Twenty percent of the pre-instructional art work did not portray people among the images although the colors selected were brighter, yellows, reds and blues. In the post-instruction project component students will again portray their perception of hospitality, and will have an opportunity to comment on the variations between their pre-instructional and post-instructional art work.

KEYWORDS: Art; Context; Hospitality; Synthesis.

INTRODUCTION

An important goal of instruction is to determine whether students are actually understanding and learning the concepts being taught. Such assessment is generally conducted using quizzes, exams, research papers, reflexive journals, case studies, oral examinations, internship portfolios and internship assessments to name a few. With regard to hospitality and tourism education what is the student's image of hospitality? Has it changed over the period of instruction? Is the change in perception the same irrespective of race, ethnicity, and previous hospitality experience, though all students are exposed to the same instruction?

Miller and Seller (1990) indicate that education theories can be grouped into three perspectives: the transmission perspective, the transaction perspective and the transformation perspective.

Lee and Scantlebury, (2011) in referencing the earlier work by Miller and Sellers (1990) indicate that while the basic transmission perspective may be useful in knowledge, skills, facts, and values to students, the learner is passive, and the responsibility for learning rests with the educator and the educational system. It assumes that people will learn when given an appropriate stimulus, and it further assumes that the process of learning is similar for all students. Although learning can occur in a classroom with many students, it is usually regarded as a unique and individual endeavor.

Lee and Scantlebury (2011) further reference Miller and Seller (1990) and Van Gyn and Grove-White, (2004) when indicating that the transaction perspective focuses on the development of skills used by the learner to acquire new knowledge. The individual is considered rational and capable of intelligent problem solving. The teacher remains responsible for structuring the learning environment however this learning environment is radically different from the environment structured from the transmission perspective. Education is viewed as a dialogue between the student and the curriculum. Teachers and students are partners in the learning process, and students must become active learners. Transaction emphasizes learner-centered outcomes and learning rather than teaching.

However, what is being sought emphasizes learning primarily as a social process, transforming the individual and the individual's external world through the educational experience focusing on personal change. It empowers the learner from unexamined ways of thinking (Mezirow, 1998) and prepares the learner to think and examine their world on their own, to draw their own conclusions, and then to take action based on their inquiries (Lee and Scantlebury, 2011; referencing Miller and Seller (1990) and Van Gyn and Grove-White, (2004).

What is the image of transformational learning associated with hospitality education and how do we know if and when it has taken place?

LITERATURE REVIEW

Not much has been written with regard to the use of drawing and art as tools in assessing hospitality student learning. La Lopa and Countryman (2000) incorporated drawing as one of the tools in evaluating team member performance in student team projects. Gamradt (1995) used art to conduct a study of 319 Jamaican primary school children's representations of tourism and while student art has been used in K-12 assessments, and in strategic change management, there is limited documentation of the incorporation of art in assessing hospitality student education. Haney, Russell and Debell (2004) in quoting (Grugeon, 1993) state that "although drawings have been used for decades as markers and mirrors of personal identity.... Drawings offer a different glimpse into human sense making than written or spoken texts do because they can express that which is not easily put into words: the ineffable, the elusive, the not-yet-thought-through, the subconscious." (p. 241). This was supported by Wambach (2010) in his presentation "More than a thousand words: The use of drawing in teaching and scholarship". He indicates that drawing provides a non-analytical way for the student to communicate, it allows students to use spatial, chromatic and abstract attributes, is non-threatening as the

quality of the image drawn is not graded, and should be one of several methods to assess effective outcomes.

PURPOSE OF THE STUDY

The primary objective of this poster presentation is to stimulate discussion around a pre-post study of student art in expressing understanding of the nature of hospitality. This is the objective of the HTM 101 fundamentals of hospitality and tourism management course at the Grand Valley State University (GVSU), “This course provides an orientation to the hotel, restaurant, and travel industry, and its history, structure, and operating procedure” (Scantlebury, 2011, p 1)

METHODOLOGY

Approximately 120 students take the HTM 101 fundamentals of hospitality and tourism course each fall and winter semester which is offered in 4 sections of the course each semester. Seventy three students from 2 sections participated in pre-instructional assessment of this two stage project:

1. Pre-Instruction benchmark. On the first day of class students were asked to draw their perception of the hospitality industry using a plain white 8 ½ by 11 inch sheet of paper (374 half-inch squares) and a 5 pack of Crayola wax crayons. The colors of the crayons provided were red, brown, green, yellow and black.
2. Post-Instruction assessment. On the final day of classes students will be asked to repeat the same exercise, and
3. On completion of the post-instruction drawing, the pre-instruction drawing will be returned to the student and they will be asked to write one sentence articulating what they see as the change.

For each student basic data will be collected on their previous professional hospitality experience, previous hospitality education experience, their age, year (freshman, sophomore, junior or senior) and number of years in college.

ANALYSIS OF FINDINGS

Content analysis as set out in Smith (2010) will be conducted of the drawings and will include: the number of colors used; specific colors selected and amount of space devoted to each color (each drawing will be measured on a 0.5 inch x 0.5 inch grid, a total of 374 squares and the amount of space will be estimated), colors selected will be analyzed based on the Eiseman (1998, 2010) meaning of color, number of images, and which images are used in both pre and post-instruction drawings.

Also to be conducted will be:

- Analysis of the words used in expressing the change in the images,
- Assessment of the influence of previous hospitality employment and educational experience in shaping images portrayed, and

- Assessment of student overall performance on the course, race and ethnicity with the change from the pre to post instruction art work will be conducted.

Where appropriate, quantitative analysis will be conducted to test for significant relationships.

In the preliminary analysis of the pre-instruction art, the following findings have been summarized:

- Of the 73 pieces of art submitted, 15 pieces (20.5%) did not include any persons in the drawings, choosing to portray buildings and the sun.
- The dominant colors were bright, yellows, blues and reds, with all artwork incorporating more than one color.

DISCUSSION

This research will document the crystallization of the image of the hospitality sector and by comparing the pre and post instruction art students will be able to see the journey in the discipline that they have traversed, a journey which might otherwise be unremarked.

Based on the findings, the change in student perception of hospitality will be discussed, the possible influences of previous experience with hospitality will be isolated and racial and ethnic influences on perception will be explored.

CONCLUSION AND NEXT STEPS

It is expected that this research project will help in developing a framework whereby a more comprehensive picture of student perception of hospitality and student transformation can be assessed. The next steps will include synthesizing feedback from ISTTE colleagues and the formal submission of the application to the GVSU Institutional Research Board for approval to conduct the research.

REFERENCES

Gamradt, J. (1995) Jamaican Children's representations of tourism, *Annals of Tourism Research*, Vol. 22, No. 4, pps. 735-762.

Haney, W., Russell, M. and DeBell, D. (2004) Drawing on Education: Using Drawings to Document Schooling and Support Change, *Harvard Educational Review* Vol. 74 No. 3 Fall 2004, pps 241-272.

Eiseman, L. (1998). *Colors for your every mood*. Sterling, VA: Capital Books.

Eiseman, L. (2000). *Pantone guide to communicating with color*. Cincinnati, OH: North Light Books.

La Lopa, J. and Countryman, C. (2000) Evaluating student team performance in the classroom or kitchen, *Chef Educator Today*, August 2000, pps 32-36

Lee, S. and Scantlebury, M. (2011) Taking the classroom on the high seas: A more engaging education, a paper presented at the ICHIE, Mid-West regional Conference,

Linn, P.L. (2004). Theories about learning and development in cooperative education and internships. In P.L. Linn, A. Howard, & E. Miller (Eds). *Handbook for research in cooperative education and internships* (pp11-28). Mahwah, NJ: Lawrence Erlbaum.

Mezirow, J. (1998). Transformative learning and social action: A response to Inglis. *Adult Education Quarterly*, 49 (Fall), 70-72.

Miller, J.P., and Seller, W. (1990). *Curriculum perspectives and practice*. Mississauga, ON: Copp Clark Pitman.

Scantlebury, M. (2011) HTM 101 Fundamentals of hospitality and tourism, course syllabus. Department of Hospitality and Tourism Management, Grand Valley State University

Smith, S. L. J. (2010) *Practical Tourism Research*, CABI Publishing

Van Gyn, G. and Grove-White, E. (2004). Theories of learning in education. In R.K. Coll & C. Eames (Eds). *International handbook for cooperative education* (pp27-38). Boston, MA: International Secretariat.

Wambach, M. (2010) More than a Thousand Words: The use of drawing in Teaching and Scholarship, Presented at the GVSU, New Faculty Orientation, Fall 2010, Eberhard Center, GVSU.

Creating Classroom to Community Connections through Experiential Learning

Sheri Eachus

Tourism, Hospitality and Wine

Empire College, United States

ABSTRACT

This paper offers actual class assignments on how to connect your tourism and hospitality students to the community and discusses the importance of supporting this connection between the students, businesses, non-profits and the college. David A. Kolb (Kolb, 1984) wrote the influential work on experiential learning. Expanding on that research, this study shows that by connecting students with potential employers through experiential learning increases their confidence, chances of being hired and exposes them to the importance of being an active citizen. It opens a dialogue for business' to share their needs with the college, allows the college to stay current with industry trends and strengthens the bond between the college and the community. Having industry professionals speak in the classroom and going on site-inspections are still viable activities for students. We found by inviting industry leaders to participate in unique experiences with students, it strengthened the relationship and connection between them. One unique experience students faced, was to conduct a mock wine tasting at a winery. The tasters were wine professionals from various wineries in the area. The students were faced with real world issues, had to think on their feet and received a genuine critique from the wine professionals upon completion. In this environment, the teacher truly becomes a facilitator, not leading or directing students, but working side-by-side with them. The students are self-directed, responsible, engaged and motivated. The learning is satisfying, relevant, diverse and task-oriented.

KEYWORDS: *Experiential learning; Community; Connection; Employers; Task-oriented; Motivated*

INTRODUCTION

"I hear, I know. I see, I remember. I do, I understand."—Confucius, China's most famous teacher, philosopher, and political theorist, 551-479 BC

Experiential Learning versus Service-Learning: The benefits of experiential learning have been well documented from Confucius, to John Dewey and more recently, David Kolb. Service-Learning on the other hand is a younger, enhanced version of experiential learning whereby students learn theory in the classroom, then put that theory to work solving real world challenges. As early as 1903, when the first Cooperative Education Movement was founded at the University of Cincinnati to today's American Association of Community College's national project, Community Colleges Broadening

Horizons through Service Learning, students at campus' across the nation have had a positive impact on their respective communities.

This paper offers three project-based, hospitality related assignments that blend Experiential Learning and Service-Learning to produce opportunities for students to learn and practice a set of skills; raise awareness and funds for local non-profits and expose graduates to potential employers. These projects allow the students to stumble as they fine tune their presentations; to experience rejection of their sales call, modify it and move on; to work together as a team, raising money for a good cause; and to find their inner motivation.

Project One is related to the wine industry, and demonstrates the concept of experiential learning and industry networking. Project Two is related to market research and again demonstrates experiential learning and industry networking. Project Three is related to event planning and incorporates experiential learning, networking and service learning.

In preparing students for employment in the hospitality, tourism and wine industries, several key proficiencies cannot be adequately measured by written exam. This is a high touch industry. No amount of theory can replace the multitude of challenges that hospitality professionals face each day. If students are given opportunities to interact with industry professionals and demonstrate their skills in a real world environment, the transition from school to employment is approached with confidence.

LITERATURE REVIEW

There are many well documented sources on Experiential Learning. John Dewey challenged traditional principles of education prevalent in the early 20th century. Central to his philosophy is the notion of learning as a lifelong process which happens in all of one's experiences, not only within the confines of a classroom and traditional models of instruction (Fuller, 2006). In his book, *Experience in Education*, Dewey writes:

There is, I think, no point in the philosophy of progressive education which is sounder than its emphasis upon the importance of the participation of the learner in the formation of the purposes which direct his activities in the learning process...(Dewey, 1938).

A social scientist, Kolb wrote the seminal work defining the theories and principles which undergird the experiential pedagogies (Fuller, 2006)

Learners, if they are to be effective, need four different kinds of abilities—concrete experience abilities, reflective observation abilities, abstract conceptualization abilities and active experimentation abilities. That is, they must be able to involve themselves fully, openly, and without bias in new experiences. They must be able to reflect on and observe their experiences from many perspectives, they must be able to create concepts that integrate their

observations into logically sound theories, and they must be able to use the theories to make decisions and solve problems. (Kolb, 1984)

One term that is not widely used in describing experiential learning is static. Experiential learning is dynamic and organic. Organic systems are vibrant, innovative and flexible (Osborn, 2005). Our students are also vibrant, innovative and flexible. They might bring to the classroom many invalid, conditioned beliefs (Tice, 1971). Therefore, it is imperative the students acknowledge that not all learning take place in the classroom. By understanding their unique, behavioural differences, students can learn how to adapt their own style, in order to get along with others, develop stronger sales skills by identifying and responding to customer types and increase their flexibility (DiSC, 1978).

Involving the community through Service-Learning is beneficial for students undertaking career exploration. Students understand issues shaping their world. Increase their interest in the academic subject matter. Students become more civically engaged and give them improved self-efficacy. The institution benefits by enhanced public image and stronger relationships with community partners, current and potential students. (Bowley & Jones, 2005). Service learning connects theory and practice (Watts, 2007).

In creating the rubric for these three projects, the grading must include those skills that cannot be measured through a standard written exam. In the wine industry, the focus should be on developing staff knowledge and increasing the comfort level in talking and teaching about wine (Henderson & Rex 2007). Having the students pour for their final exam, allows the instructor to evaluate these skills. The three projects outlined in this paper express the virtuous cycle of enlightened hospitality (Meyer, 2006). Included in the rubric should be the why and how of interacting with the primary stakeholders of the hospitality cycle that include co-workers, community, and vendors. The use of a grading rubric, when communicated to students, also serves as a sort of contract. If students know how they will be evaluated before they are given an assignment, they have more opportunity to fulfill the highest level of expectations. If instructors articulate how they will evaluate student performance and communicate that to students, then there will be less misunderstanding later on about how the instructor arrived at grades. Grading rubrics take the suspicion of arbitrariness out of grading, and help foster a more trustful relationship between students and instructors (Hallett).

METHODOLOGY

For each of the Projects, the statement of the goals and objectives will be followed by assignments specific to the project and the grading rubric. Limitations and challenges are discussed and addressed.

Project One – Wine Tasting Final

The goals and objectives for this final are based on the job skills that wineries are seeking in potential candidates.

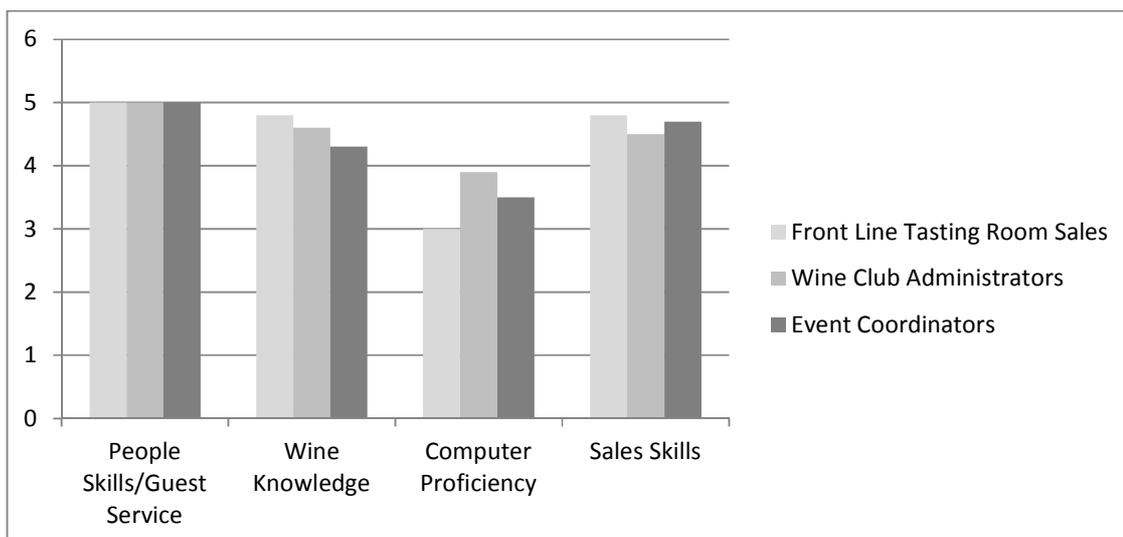


Figure 1. Top Four Skills for Winery Employees (selected jobs posted May – July 2011)

Based on this data, the goals and objectives for the wine final are defined as: create a positive, memorable guest experience; wine knowledge and correct use of wine terminology; and sales skills.

Students select a local winery and a specific wine from that winery they will pour during the final. They must purchase one bottle to be used during the final. (Often, the winery will deeply discount the wine or give the bottle complimentary to the student once they learn what the student is using the wine for). The student researches the history of the winery, winemaker and the wine in preparation for the final. The class visits wineries and observes tasting room skills from a variety of tasting room staff. After each visit, a class discussion takes place to review our observations.

In preparation for the final, the instructor contacts a winery and arranges for the final exam to be held before the winery opens to the public. Students are asked to invite up to four industry professionals to participate. The industry professionals are given ideas on different scenarios they can present to the students during their final. The scenarios are typical of what they see in their wineries on any given day; novice tasters, wine aficionados, the inebriated and designated drivers. The students do not know what to expect and must make instant decisions on which direction the tasting/final will go. They greet the guests and ask questions to ascertain how to proceed. Based on the theory discussed in class, the field trips and observations at wineries and the individual research, the students are in complete control of their final exam. The rubric is generic as each interaction leads the student down a unique path. The points they need to address relate to the goals and objectives previously reported. Upon the completion of the tasting/final, an oral critique from the instructor and the wine professionals complete the final. This project adeptly represents the theories and principals Kolb discussed.

Learners, if they are to be effective, need four different kinds of abilities—concrete experience abilities, reflective observation abilities, abstract conceptualization abilities and active experimentation abilities. (Kolb, 1984)

Table 1. Wine Final Rubric

CATEGORY	4	3	2	1
Guest Service	Well-rehearsed with smooth delivery that creates positive, memorable guest experiences.	Rehearsed with fairly smooth delivery that creates positive, memorable guest experiences most of the time.	Delivery not smooth, but able to maintain positive, memorable guest experiences most of the time.	Delivery not smooth and guest service experience often lost.
Winery research	Interesting, well-rehearsed with smooth delivery with accurate information shared at all times.	Relatively interesting, rehearsed with a fairly smooth delivery with accurate information shared at all times.	Delivery not smooth, but able to maintain guest experience and information accurate most of the time.	Delivery not smooth, guest experience lost and information incorrect most of the time.
Terminology	Covers topic in-depth with details and examples. Subject knowledge is excellent.	Includes essential knowledge about the topic. Subject knowledge appears to be good.	Includes essential information about the topic but there are 1-2 factual errors.	Content is minimal OR there are several factual errors.
Requirements	All requirements are met and exceeded.	All requirements are met.	One requirement was not completely met.	More than one requirement was not completely met.

If the student is under 21 years of age, they are not allowed to pour wine. In this instance, there is a written final exam.

Project Two – Case Study Market Research

The goals and objectives of this experiential learning project are teamwork; time management; effective oral and written communication; industry research; data collection and analysis; networking with industry professionals.

Working together as a team, reading current industry related articles and conducting informational interviews with tourism, lodging and winery employees students choose an issue to study. They then create the questionnaire and conduct the survey using a variety of methods: in person, internet, email and faxing. Once the data has been collected, each student analyzes the data, then formulates their conclusion and writes their final paper.

One example of a case study conducted by the class addressed the issue of acceptable body art for front-line hospitality employees. Students decided to query employers, employees and guests, at wineries and hotels regarding their level of acceptance to certain types of body art i.e. visible piercing and tattoos. Students found guests and employees were much more accepting of multiple ear piercings, nose piercing and ‘tasteful’ tattoos than employers. Guests and employers disapproved of lip and brow piercings and large gauges in the ears. They also disapproved of tattoos found on the neck and hands.

Table 2. Case Study Market Research Rubric

CATEGORY	4	3	2	1
Delegation of Responsibility	Each student in the group can clearly explain what information is needed by the group, what information s/he is responsible for locating, and when the information is needed.	Each student in the group can clearly explain what information s/he is responsible for locating.	Each student in the group can, with minimal prompting from peers, clearly explain what information s/he is responsible for locating.	One or more students in the group cannot clearly explain what information they are responsible for locating.
Group Timeline	Group independently develops a reasonable, complete timeline describing when different parts of the work will be done. All students in group can independently describe the high points of the timeline.	Group independently develops a timeline describing when most parts of the work will be done. All students in group can independently describe the high points of the timeline.	Group independently develops a timeline describing when most parts of the work will be done. Most students can independently describe the high points of the timeline.	Group needs help to develop a timeline AND/OR several students in the group cannot independently describe the high points of the timeline.
Ideas/Research Questions	Researchers independently identify at least 10 reasonable, insightful, creative ideas/questions to pursue when doing the research.	Researchers independently identify at least 8 reasonable ideas/questions to pursue when doing the research.	Researchers identify, with some adult help, at least 6 reasonable ideas/questions to pursue when doing the research.	Researchers identify, with considerable help, 4 reasonable ideas/questions to pursue when doing the research.
Plan for Organizing Information	Students have developed a clear plan for organizing the information as it is gathered and in the final research product. All students can independently explain the planned organization of the research findings.	Students have developed a clear plan for organizing the information in the final research product. All students can independently explain this plan.	Students have developed a clear plan for organizing the information as it is gathered. All students can independently explain most of this plan.	Students have no clear plan for organizing the information AND/OR students in the group cannot explain their organizational plan.

Quality of Sources	Researchers independently locate at least 10 reliable, interesting information sources for EACH of their ideas or questions.	Researchers independently locate at least 8 reliable information sources for EACH of their ideas or questions.	Researchers, locate at least 6 reliable information sources for EACH of their ideas or questions.	Researchers locate at least 4 reliable information sources for EACH of their ideas or questions.
---------------------------	--	--	---	--

This project sparked the interest of several employers and they asked for a copy of the final study for their own use.

Project Three – Event Planning

There are many well written texts on event planning. There are also many opportunities in using experiential learning and service learning to teach event planning. The goals and objectives for this project are to create an awareness and raise funds for non-profit organizations; brainstorming; teamwork; sales and marketing; networking; event pattern, design and flow; budgeting and time management.

The class is presented with the prospect to raise money for a local charity by planning and executing an event in the span of eight weeks with a budget of zero. This has been the most successful of our service learning projects. In the past five years, we have raised over \$60,000.00 for local childrens charities.

Students begin by researching local charities and select one to raise money for. Brainstorming for event themes and ideas come next. Most events have the following components: ticket sales, sponsors, silent auction and donations. Two of our most successful events have been our Life Sized Monopoly Game, held in the parking lot of the college and our Sonoma County Potluck Chef Showdown, now in our fifth year. Our Potluck Chef Showdown creates a win-win-win scenario for the groups involved.

- Companies are asked to choose the best Potluck Chef at their company (no professional chefs) for a sponsorship fee. They can use this as a recognition award for that employee or a team building project for a group of employees.
- The Potluck Chef then prepares enough of the potluck dish for a regular serving to each of the ‘celebrity judges’ on the panel and for a bite-size sample for the spectators.
- The ‘Celebrity Judges’ are professional chefs and students in the local high school culinary arts programs.
- Spectators are invited to purchase tickets that allow them to sample the dishes, vote for Peoples Choice Award and play BINGO for prizes that have been donated.
- The ‘Celebrity Judges’ vote for Best Plated Dish, Best Tablescape, and Best Overall.

This is a win for the non-profit as they do not need to do any work. All we ask is that they come to the event and talk about their non-profit. They receive 100% of the

money raised. The celebrity judges, companies sponsoring a chef, and the donors for BINGO prizes win by the exposure and marketing we conduct for the event. We use social media and traditional media to promote and advertise. The high school culinary arts students benefit by being able to work with local restaurateurs during the judging giving them an opportunity to network. Finally the colleges students win through the experiential learning and service learning this project provides.

Table 3. Event Planning Rubric

CATEGORY	4	3	2	1
Delegation of Responsibility	Each student in the group can clearly explain what information is needed by the group, what information s/he is responsible for locating, and when the information is needed.	Each student in the group can clearly explain what information s/he is responsible for locating.	Each student in the group can, with minimal prompting from peers, clearly explain what information s/he is responsible for locating.	One or more students in the group cannot clearly explain what information they are responsible for locating.
Plan for Organizing Information	Students have developed a clear plan for organizing the information as it is gathered. All students can independently explain the planned organization of the research findings.	Students have developed a clear plan for organizing the information. All students can independently explain this plan.	Students have developed a clear plan for organizing the information as it is gathered. All students can independently explain most of this plan.	Students have no clear plan for organizing the information AND/OR students in the group cannot explain their organizational plan.
Quality of Sources	Students independently locate at least 15 reliable, donations/vendors	Researchers independently locate at least 12 reliable, donations/vendors.	Researchers, with some adult help, locate at least 8 reliable, donations/vendors	Researchers, with extensive adult help, locate at least 4 reliable, donations/vendors
Group Timeline	Group independently develops a reasonable, complete timeline describing when different parts of the work (e.g.,planning, research) will be done. All students in group can independently describe the high points of the timeline.	Group independently develops a timeline describing when most parts of the work will be done. All students in group can independently describe the high points of the timeline.	Group independently develops a timeline describing when most parts of the work will be done. Most students can independently describe the high points of the timeline.	Group needs help to develop a timeline AND/OR several students in the group cannot independently describe the high points of the timeline.
Requirements	All requirements are met and exceeded.	All requirements are met.	One requirement was not completely met.	More than one requirement was not completely met.

There are many issues that can arise with a class assignment of executing a live event. We eagerly await each event to see what challenges we will face. Part of the learning aspect is working through those challenges on the spot. No amount of classroom theory or text book will properly prepare students to think on their feet.

CONCLUSION

Opportunities for experiential learning and service learning are everywhere! By communicating with business leaders you will identify what skills they are looking for when hiring. Taking that information and creating projects that will highlight your students skills to these employers while benefiting non-profits in your community solidifies your institution in the community and offers the students the opportunity to move easily from graduation to employment.

Each of these projects allow the students to be responsible, engaged and motivated. The learning is satisfying, relevant, diverse and task-oriented.

REFERENCES

- Dewey, John (1938). *Experience in Education* Simon and Schuster
- DiSC (1978) Retrieved August 18, 2011 from the World Wide Web:
<http://www.discprofile.com>
- Fuller, Thara (2006) *History of Experiential Learning as a Teaching Pedagogy*
- Hallett, Karen, Dr. *How to Create a Grading Rubric*. Retrieved August 18, 2011 from the World Wide Web: <http://www.indiana.edu/~icy/document/hallett1.pdf>
- Henderson, J. Patrick & Rex, Dellie (2007) *About Wine*. Delmar Publishing
- Kolb, David (1984). *Experiential Learning: Experience as the Source of Learning and Development*. Englewood Cliffs: NJ, Printice-Hall
- Meyer, Danny (2006) *Setting the Table*. New York, NY: HarperCollins
- Osborn, Hugh (2005) *Organic Education: Update 2005*. Retrieved August 6, 2011 from the World Wide Web: <http://home.blarg.net/~building/trans/osborn.html>
- Scheibel, Jim & Bowley, Erin & Jones, Steven (2005) *The Promise of Partnerships*. Providence, RI: Campus Compact
- Tice, Lou (1971) *The Pacific Institute*. Seattle, WA
- Watts, Margit Misangyi (2007). *Service Learning*. Upper Saddle River, NJ: Pearson Printice-Hall

MOTIVATIONS AND EXPERIENCES OF FIRST-TIME AND REPEAT CONFERENCE ATTENDEES

Jeeyeon “Jeannie” Hahm
Rosen College of Hospitality Management
University of Central Florida

Kimberly Severt
Rosen College of Hospitality Management
University of Central Florida

and

Deborah Breiter
Rosen College of Hospitality Management
University of Central Florida

ABSTRACT

This study used a focus group methodology in an effort to gain a deeper understanding of the differences in motivations to attend an annual association conference and the experience at the conference between first-time and repeat attendees. There were noticeable differences between the two groups in terms of their perception on the importance of the conference location and expectations for the conference. Also, first-time attendees focused more on the basic needs whereas repeat attendees focused more on the program and achieving the objectives of their attendance.

KEYWORDS: Conference attendees; Experiences; First-time attendees; Focus group; Motivations; Repeat attendees

INTRODUCTION

There has been extensive research surrounding the motivations, behaviors, and characteristics of first-time and repeat visitors in the tourism literature (e.g., Fallon & Schofield, 2004; Fuchs & Reichel, 2011; Lau & McKercher, 2004; Li, Cheng, Kim, & Petrick, 2008; McKercher & Wong, 2004; Morais & Lin, 2010; Okamura & Fukushige, 2010; Petrick, 2004; Rosenbaum, 2006). Previous research shows that repeat visitors are more likely to return to the same destination than are first-time visitors (Petrick & Backman, 2002; Sonmez & Graefe, 1998). As a result, repeat visitors provide a significant amount of revenue and are a reliable group for potential visitation (Reid & Reid, 1993). Although the majority of research regarding first-time and repeat visitors is in the general tourism area and destination studies, some are presented in the research of festivals (e.g., Anwar & Sohail, 2004; Lee & Beeler, 2007; Lee, Lee, & Yoon, 2009; Shanka & Taylor, 2004). However, there has not been a study comparing first-time and repeat attendees in the meetings and conventions industry.

Associations rely on profits from their annual conventions to fund approximately one-third of their annual operating budgets (Fenich, 2008). It is a constant challenge for associations and conference organizers to attract attendance since only a small percentage of all association members actually attend (Var, Cesario, & Mauser, 1985). Also, people tend to hold multiple association memberships which give them a selection of meetings to attend (Yoo & Zhao, 2010). It is important to maintain a high proportion of repeat attendees to maximize attendance (Getz, 1991). Association conference organizers should understand what repeat attendees need and want in order to attract them to come back year after year. Similarly, they need to understand what first-timers are looking for in an effort to pull new attendees in and more importantly convert them into repeat attendees. To this end, the purpose of this study is to understand the differences in motivations to attend an annual association meeting and the experiences between first-time attendees and repeat attendees.

LITERATURE REVIEW

There has been only a small amount of research regarding first-time and repeat visitors in festival research. Mohr, Backman, Gahan, & Backman (1993) found significant differences between first-timers and repeaters on the level of both motivation and satisfaction. On the other hand, Crompton and Love (1995) discovered no significant difference between first-time and repeat festivalgoers in any of the seven quality operationalizations (e.g., expectations, performance, and importance less performance). Anwar and Sohail (2004) examined the perception of first-time and repeat visitors to the Dubai Shopping Festival on festival-related attributes and destination-related attributes. Shanka and Taylor (2004) identified two attributes and four visitor characteristics that showed discriminating ability between first-time visitors and repeat visitors. The two attributes were parking and services, while the four characteristics were age, place of residence, group composition, and information resources utilized. Lee and Beeler (2007) found differences between first-time and repeat visitors in terms of the strength of the relationship among service quality, satisfaction, and future intention. First-time visitors were more likely than repeat visitors to count on the quality of the festival to be satisfied, while repeat visitors were satisfied with factors other than service quality. Lee et al. (2009) examined the underlying quality dimensions that distinguish between first-timers and repeaters that cultivate festival loyalty. In their study of visitors to the Punggi Ginseng Festival in Korea, they found that repeaters valued the program and convenient facilities more, whereas first-timers valued food and souvenir more in addition to the program and convenient facilities.

There is extensive literature regarding first-time visitors and repeat visitors in the general tourism research and some in festival research. Although there are studies that examined motivations to attend and the decision-making process of attendees, there have not been research comparing first-time attendees and repeat attendees in the meeting and convention industry. This study will contribute to some understanding of the differences between the two groups at an annual conference.

METHODOLOGY

A qualitative approach was used to elicit rich information regarding the motivations of first-time and repeat association members to attend an annual association conference and expo. A total of 24 association members of a national professional association representing therapy practitioners and students served as participants in the study. The association conference organizers assisted in the recruitment of participants. An invitation letter was sent out to association members via email describing the study, date, time, and location of the focus group sessions, and incentives for participation.

Two populations were recruited for the focus groups. The first group consisted of association members that had an experience with the same annual conference (repeat attendees). The second group consisted of members that had no prior experience with this particular annual conference (first-time attendees). The two focus group sessions were conducted separately over two days of the four-day annual conference and expo that was held in Orlando, Florida late April of 2010. The first session was for the repeat attendees on the first day of the conference and the second one was for the first-time attendees on the second day of the conference. Both focus group sessions were held prior to the educational sessions not to interfere with the conference schedule. The number of attendees for the repeat group was 15 and nine for the first-time group. The length of the focus groups was 90 minutes each.

At the beginning of each focus group session, the participants were welcomed to the session, the purpose of the study was discussed by the researchers/interviewers, and the process of the session was described. For both focus group sessions, two researchers were present to ask the questions and record the conversations. While one researcher asked questions, the other took note in addition to the tape recorder. The researchers asked for permission to tape record the conversations and reiterated that their participation was voluntary. The researchers also stressed that individual responses would be kept completely confidential and all data would be reported as group data.

In open-ended format, participants were asked to respond to questions about their experience with the annual conference. There was no personal information collected or used for this study. Questions were based on previous literature and the association's previous post-convention survey. The types of questions asked were mostly experience and behavior questions as well as opinion questions. The questions were more open-ended and no dichotomous questions were asked in order to encourage more descriptive and richer answers.

The audio tapes were transcribed and then erased to ensure confidentiality. Data from the focus groups were coded and analyzed. Overall the focus group discussions provided rich information about their motivations for attending the conference, their experience from registration to arriving at the conference and destination, and their expectations for the next conference.

PRELIMINARY RESULTS

The findings showed a major difference between first-time attendees and repeat attendees. The most noticeable difference between the two groups was the perceived importance of the conference location. For the repeat attendees, the location of the conference was not important in their decision to attend the conference, whereas it was very important to the first-time attendees. The location was the second highest reason to attend the conference for the first-timers after continuing education and before networking. In addition, a vacation location was very important for the first-time attendees. For the repeat attendees, the location factor was not even mentioned as a reason for attendance but networking, professional development, education, and presenting. It seemed that the first-time attendees were using the conference as more of an escape from the ordinary and a means to have fun.

Another finding was that first-time attendees focused more on the basic needs, such as food and water availability, registration process, and the accommodations. The repeat attendees focused more on the program and achieving the objectives of attending the conference. This finding agrees with the results of Lee et al. (2009) where program was an antecedent to value for repeaters and food and souvenirs were of more value antecedents for first timers.

CONCLUSION

This study focused on the differences between first-time and repeat attendees to an annual association conference in terms of motivations to attend and the experience at the conference. The two groups differed in terms of their perception on the importance of the conference location and expectations for the conference. In addition, the authors found that first-time attendees focused more on the basic needs whereas repeat attendees focused more on the program and achieving the objectives of their attendance.

The authors used a focus group methodology to gain a deeper understanding of the differences in motivations to attend and the experience between first-time and repeat attendees. Therefore, it can be argued that the findings of this study have limited generalizability. It would be valuable to conduct similar studies at other types of meetings. Moreover, it is recommended to follow up with a mass survey in order to confirm and more strongly support the study findings. Another suggestion is to interview or survey the attendees after the meeting rather than at the beginning. The participants of this study were interviewed at the beginning of the conference which did not allow them to fully experience the current meeting. This could have hindered the participants' ability to provide a more accurate assessment about their experiences, especially for the first-time attendees.

REFERENCES

Anwar, S. A. & Sohail, M. S. (2004). Festival tourism in the United Arab Emirates: First-

- time versus repeat visitor perceptions. *Journal of Vacation Marketing*, 10(2), 161-170.
- Fallon, P. & Schofield, P. (2003). First-timer versus repeat visitor satisfaction: The case of Orlando, Florida. *Tourism Analysis*, 8(2-4), 205-210.
- Fenich, G. G. (2008). *Meetings, expositions, events, & conventions: An introduction to the industry* (2nd ed.). Upper Saddle River, NJ: Pearson Prentice Hall.
- Fuchs, G. & Reichel, A. (2011). An exploratory inquiry into destination risk perceptions and risk reduction strategies of first time vs. repeat visitors to a highly volatile destination. *Tourism Management*, 32(2), 266-276.
- Getz, D. (1991). *Festivals, special events, and tourism*. New York: Van Nostrand Reinhold.
- Lau, A. L. S. & McKercher, B. (2004). Exploration versus acquisition: A comparison of first-time and repeat visitors. *Journal of Travel Research*, 42(3), 279-285.
- Lee, J. & Beeler, C. (2007). The relationships among quality, satisfaction, and future intention for first-time and repeat visitors in a festival setting. *Event Management*, 10(4), 197-208.
- Lee, J., Lee, C., & Yoon, Y. (2009). Investigating differences in antecedents to value between first-time and repeat festival-goers. *Journal of Travel & Tourism Marketing*, 26(7), 688-702.
- Li, X., Cheng, C., Kim, H., & Petrick, J. K. (2008). A systematic comparison of first-time and repeat visitors via a two-phase online survey. *Tourism Management*, 29(2), 278-293.
- McKercher, B. & Wong, D. Y. Y. (2004). Understanding tourism behavior: Examining the combined effects of prior visitation history and destination status. *Journal of Travel Research*, 43(2), 171-179.
- Mohr, K., Backman, K., Gahan, L., & Backman, S. (1993). An investigation of festival motivations and event satisfaction by visitor type. *Festival Management and Event Tourism*, 1(3), 89-97.
- Morais, D. B. & Lin, C. (2010). Why do first-time and repeat visitors patronize a destination? *Journal of Travel & Tourism Marketing*, 27(2), 193-210.
- Okamura, K. & Fukushige, M. (2010). Differences in travel objectives between first-time and repeat tourists: An empirical analysis for the Kansai area in Japan. *International Journal of Tourism Research*, 12(6), 647-664.
- Petrick, J. (2004). First timers' and repeaters' perceived value. *Journal of Travel Research*, 43(1), 29-38.
- Petrick, J. & Backman, S. (2002). An examination of the construct of perceived value for the prediction of golf travelers' intentions to revisit. *Journal of Travel Research*, 41(1), 38-45.
- Reid, L. & Reid, S. (1993). Communicating tourism supplier services: Building repeat visitor relationships. *Journal of Travel & Tourism Marketing*, 2(2-3), 3-19.
- Rosenbaum, M. S. (2006). The hedonic repeat visit: Exploring consumption differences among first-time and repeat Japanese visitors in Hawaii. *Tourism Analysis*, 11(5), 289-295.
- Shanka, T. & Taylor, R. (2004). Discriminating factors of first-time and repeat visitors to wine festivals. *Current Issues in Tourism*, 7(2), 134-145.
- Sonmez, S. & Graefe, A. (1998). Determining future travel behavior from past travel

- experience and perceptions of risk and safety. *Journal of Travel Research*, 37(2), 171-177.
- Var, T., Cesario, F., & Mauser, G. (1985). Convention tourism modeling. *Tourism Management*, 195-204.
- Yoo, J. J. & Zhao, X. (2010). Revisiting determinants of convention participation decision making. *Journal of Travel & Tourism Marketing*, 27(2), 179-192.

An international perspective on application of Psychological Ownership theory in educational settings.

Lisa Slevitch
Oklahoma State University

Stacy Tomas
North Carolina State University

Tracy Harkison
Auckland University of Technology

Dana Vasiloaica
Institute of Technology Sligo

Abstract

This study applies Psychological Ownership (PO) theory in educational settings in different cultural backgrounds. The theory will be tested in educational institutions from the United States, New Zealand, and Ireland. The proposed framework entails on-line format. Confirmatory factor analysis and structural equation modeling will be applied for data analysis. Obtained results will be conveyed in subsequent reports.

Keywords: psychological ownership, student satisfaction, involvement

Theoretical Underpinnings

Building long-term successful relationships between academic units and students is becoming increasingly important and challenging in today's competitive higher education world. The effects of long-term relationships with students and alumni have been notable as those directly affect profitability and reputation of educational institutions (Balmer & Liao, 2007; Kuh, 2001). It is commonly agreed that in order to be willing to commit or be loyal to a college or university, students need to be satisfied with their educational experiences (Pierce et al., 2003). Consequently, it becomes imperative to understand what contributes to such satisfying experiences.

One of the factors that has shown a strong influence on individual's behavior is psychological ownership or PO (Asatryan & Oh, 2008). PO has been explored in the area of consumer behavior and is described as a state in which an individual feels as though the target of ownership is his or hers (Pierce et al., 2003). Such outcomes as commitment and loyalty were found to be positively associated with PO in multiple studies (Pare et al., 2006). The theory of Cognitive Dissonance and Self-Congruity theory (Sirgy, 1985a,b) provide explanation to why PO or feeling of "mineness" positively affects satisfaction and commitment. Each of these theories holds similar notion in that the individual's actionable response is influenced by the object's attributes that match one's self-identity. Therefore, identification of motives that result in PO and its behavioral outcomes is crucial for understanding students' behavior and for building long-term relationships with them why they are in school or become alumni.

Nevertheless, the matters of satisfaction and commitment tend to be complex, and previous studies revealed several factors affecting satisfaction and commitment outcomes (Strauss & Volkwein, 2004). One of such factors is cultural background or context (Seddighi et al., 2000). The current study will utilize PO theory and investigate how students form PO toward a program, college, or university in different cultural contexts (Pierce et al., 2003). This study will adopt the approach and the instrument suggested by Pierce et al. (2003). More specifically, the objectives of the study are to:

1. Examine how PO is formed based on basic motives such as perceived control, self-identity, and sense of belonging in different cultural contexts;
2. Investigate the commonalities and differences in antecedents and consequences of PO when applied across cultures.

Significance of the Study

The study provides a foundation for alternative approaches to explaining students' behavioral intentions in different cultural contexts, based on PO theory. The results may indicate new opportunities that could change the way educators promote and design educational services and have a positive impact on organizational bottom line.

Methods

A convenience sample of hospitality and tourism undergraduate students from programs in the United States, New Zealand, and Ireland will be used to collect data. Such countries were selected to represent different continents and cultural backgrounds, but at the same time the countries where most of the population is English speaking, which allows consistency of the research instrument. The survey will be conducted in an online format. PO measurement scales will be adopted from Pierce et al. (2003) and Asatryan and Oh (2008). Commitment and loyalty scales will be adopted from Söderlund (2006) and Strauss & Volkwein (2004). Five-point Likert-type scales will be used for all construct measurements, except for demographic information. The analysis will consist largely of two parts: (1) preliminary/descriptive analyses and (2) confirmatory factor analysis. The results are currently being processed and will be reported in the following submission.

References

- Asatryan, V., & Oh, H. (2008). Psychological ownership theory: An exploratory application in the restaurant industry. *Journal of Hospitality & Tourism Research*, 32(3), 363-386.
- Balmer, J. M. T., & Liao, M-N. (2007). Student corporate brand identification: An exploratory case study. *Corporate communications: An international Journal*, 12(4), 356-375.
- Kuh, G. D. (2001). Assessing what really matters to student learning: Inside the National Survey of Student Engagement. *Change* 33(3), 10-17.

Pare, G., Sicotte, C., & Jacques, H. (2006). The effects of psychological ownership on physicians' acceptance of clinical information systems. *Journal of the American Medical Informatics Association*, 13(2), 197-205.

Pierce, J. L., Kostova, T., & Dirks, K. (2003). The state of psychological ownership: Integrating and extending a century of research. *Review of General Psychology*, 7(1), 84-107.

Strauss, L. C., & Volkwein, J. F. (2004). Predictors of student commitment at two-year and four-year institutions. *The Journal of Higher Education*, 75(2), 203-227.

Sirgy, M. Joseph (1985a). "Using Self-Congruity and Ideal Congruity to Predict Purchase Motivation." *Journal of Business Research*, 13(3), 195-206.

Sirgy, M. Joseph (1985b). "Self-Image / Product Image Congruity and Consumer Decision Making." *International Journal of Management*, 2(4), 49-63.

Seddighi, H.R., Nuttall, M.W., & Theocharous, A.L. (2000). Does cultural background of tourists influence the destination choice? An empirical study with special reference to political instability. *Tourism Management*, 22, 181-191.

Soderlund, M. (2006). Measuring customer loyalty with multi-item scales: A case of caution. *International Journal of Service Industry Management*, 17(1), 76-98.

Strauss, L. C., & Volkwein, J. F. (2004). Predictors of student commitment at two-year and four-year institutions. *The Journal of Higher Education*, 75(2), 203-227.

DESIGNING LOCATION-BASED SERVICES IN TOURISM BY USING THE DICK AND CAREY SYSTEMS APPROACH MODEL

Chen-Hsiung Chou
Department of Travel Management
Taiwan Hospitality & Tourism College, Taiwan, R.O.C.

ABSTRACT

Location-Based Services (LBS) has been applied to assist in providing travel information for a while. Travel information is the most important for tourists, so providing helpful information is a significant issue for the travel professional. This paper discusses the adoption of The Dick and Carey Systems Approach model to design an ISD for LBS in tourism so that students could get better learning result and providing professional services in the future. This approach for design could supply the students progressing to a degree in the travel or tourism field to be better informed and more efficient in their future careers.

KEYWORDS: Location-based services; Instructional system design.

INTRODUCTION

Tourists sometimes encounter problems when they are traveling in a strange destination, area, or city because of a lack of travel information. In Brown & Chalmers' (2003) study in tourism, they reported problems that travelers have usually faced. The first problem is what to do and the second is how they are going to do it; moreover, planning different activities complicates matters. The final problem is finding out where things are. Although overcoming those problems, organizing and planning an itinerary before departure and traveling to destinations are part of the gratification of tourism, tourists need better services and methods to help when problems occur. Those problems are sometimes frustrating to travelers especially when the information on the itinerary differs from the practical experience of the traveler or lacks accurate information regarding current attractions or events. Therefore, students of a tourism department and professionals in the tourism industry need materials based on an Instructional System Design (ISD) to enhance their IT knowledge and capacities to providing services.

Since the Federal Communications Commission (FCC) of United States took action to improve the quality and reliability of 911 emergency services for wireless phone users in 1996 called Enhanced 911 rules (E911) for safety issue, wireless network operators must provide for 95% of all cell phone calls' location by December

31, 2005 (cited from Wikipedia). This action provides the technological foundation for Location-Based Services (LBS) (Junglas & Watson, 2008). Thus, Location-Based Service (LBS) is one of important fields for students to study in order to provide the best information services. Hence, this paper will discuss the application of an ISD known as the Dick and Carey Systems Approach Model (Dick & Carey, 1996) to training individuals on the use of location-based services.

THE DICK AND CAREY SYSTEMS APPROACH MODEL

The Dick and Carey Systems Approach model is mainly to improve the instructor acquiring more knowledge and learning more methods to enhance the learning efficiency of learners (Dick & Carey, 1996). There are ten major process components in the model including nine basic steps in the iterative cycle and one culminating evaluation of the effectiveness of the instruction such as figure one.

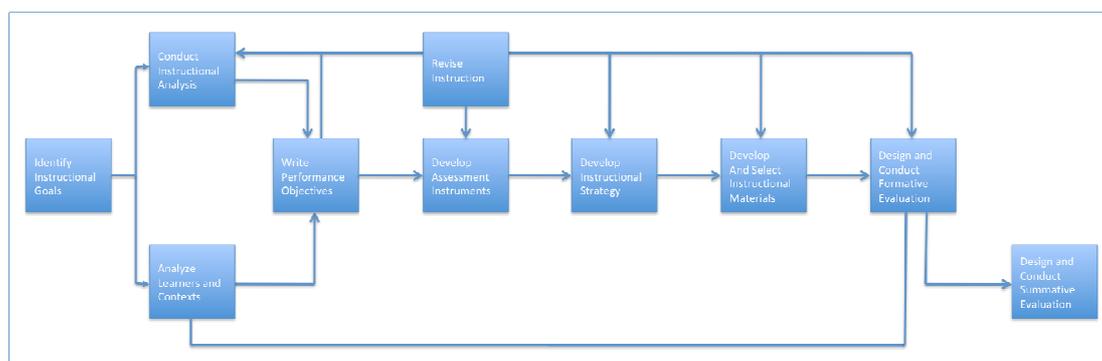


Figure 1. The Model of the Dick and the Carey Systems Approach Model (Retrieved from Dick & Carey, 1996)

THE ISD OF LBS IN TOURISM BY ADOPTING THE MODEL

Although Dick and Carey said that designers can modify the model according to their situation and environment, the easy way for novice instructional designer is following the basic model. There for this paper will adopt the fundamental components for the course.

1. Instructional goal(s): Understanding the importance of LBS in tourism and knowing how to apply LBS in tourism.
2. Instructional analysis: (1) Knowledge and developing history about LBS, (2) The function of LBS, (3) The application of LBS, (4) The current market situation of LBS, and (5) The future development of LBS.
3. Analyze learners and contexts: According to the briefly discussion, students have no idea about the LBS. Thus, the contexts will be basic level for them and will provide them with practical experience using mobile devices.

4. Performance objectives: The learners will be able to understand and talk about LBS and be able to demonstrate the functions of the LBS devices in a tourism context.
5. Develop Assessment Instruments: to develop a criteria-referenced assessment consistent with the performance objectives. For example, the midterm exam will be multiple choices for evaluating the understanding of course objects and materials. Moreover, the demonstration of the functions will be the assignment for final exam.
6. Develop instructional strategy: There are 5 strategies. (1) Students will be asked to search news about LBS for the first homework and activities. (2) Lecturing is first step of activity. This activity can make students know more and correct information about LBS. (3) Homework for reading research papers. (4) Group discussion will be the activity four. (5) Experiencing the mobile devices will final activity.
7. Develop and select instruction: to use the instructional strategies to produce the instruction.
8. Design and conduct formative evaluation: Evaluation will be (1) a midterm test and a final test; (2) showing and displaying physically the functions of LBS; and (3) telling the history, development, and features of LBS.
9. Revise Instruction: If ISD needs to be modified, revising ISD will be applied. Therefore, through the analysis of the evaluation results, the activities should be assessed to their ability to accomplish the goals set up for the learner to achieve.
10. The final step of the model is to “design and conduct summative evaluation” which means is to evaluate the value of the project at its conclusion. Thus, after the ISD is applied and the project completed, the evaluation will be conducted and used as the basis for subsequent redesign efforts.

CONCLUSION

Location-Based Services developing from safety issue has applied into providing travel information for a while. Since travel information is what tourists need and what tourists hardly have when they in the attractions, LBS can provide such information they need. Students of tourism department will be the profession in the tourism industry. Thus, they have to have the capacities of LBS in order to provide the best services. The ISD of LBS will be essential for them. This paper is try to discuss adopting The Dick and Carey Systems Approach model to design a ISD for LBS in tourism so that students could get better learning result in hope.

Location-Based Services developing from safety issue has applied into

providing travel information for a while. Because high quality travel information is what tourist needs, but most often lack when near attractions, LBS can provide a great value. Students of majoring tourism will soon be professionals in the tourism industry. Thus, it is important for them having capacities of LBS in order to provide their clients the best services. This paper discusses adopting The Dick and Carey Systems Approach model to design the instruction for implementing LBS in tourism so that students may enjoy improved learning experiences.

REFERENCES

- Brown, B. & Chalmers, M. (2003). Tourism and mobile technology. Kuutti, E., Fitzpatrick, P., Dourish, P., & Schmidt, K. (2003). Proceedings of the Eighth European Conference on Computer-Supported Cooperative Work, 14-18 September 2003. Helsinki, Finland.
- Dick, W. & Carey, L. (1996). The systematic design of instruction (4th ed.). New York: Harper Collins. Retrieved from http://www.netwerkopenhogeschool.org/Docs/Faculiteiten/OW/O22411_the%20systematic%20design%20of%20instruction.pdf
- E 911 Retrieved from http://en.wikipedia.org/wiki/Enhanced_911
- Instructional design. Retrieved from http://en.wikipedia.org/wiki/Instructional_design
- Junglas, I. A., & Watson, R. T. (2008). Location-Based services. *Association for Computing Machinery, 51(3)*, 65. Retrieved from ProQuest: Research Library database.
- Passerini, K. & Granger, M. J. (1999). A developmental model for distance learning using the Internet Retrieved from <http://www.tlu.ee/~kpata/haridustehnoloogiaTLU/elearningdesignmodels.pdf>
- Siemens, G. (September 30, 2002). Instructional Design in Elearning. Retrieved from http://jeffrudisill.com/Content/EDTC%20524%20Instructional%20Design%20and%20Development/Readings%20on%20ID/http___www.elearnspace.org_Articles_InstructionalDesign.pdf

ARE YOU STILL ON HOLD? : IMPACT OF INBOUND CALL CENTER WAITING ON SERVICE SATISFACTION

Seung Hyun Lee

Rosen College of Hospitality Management

University of Central Florida, USA

and

Heejung Ro

Rosen College of Hospitality Management

University of Central Florida, USA

ABSTRACT

Call centers can become the focus of successful customer relationship management strategies. The hospitality industry relies heavily on call center operations to take reservation, provides information and handle of complaints. Call centers are implemented to provide convenient, faster service, but the majority complaints come from having to wait on the phone. Even though companies cannot always eliminate waits, they can make an effort to manage customers' perceptions and reactions. The purpose of study is to examine how providing an estimated waiting time and reasons for calling influence call center satisfaction. By understanding the factors that influence consumers' perceptions on waiting, managers may be able to decrease the negative impact from such waiting.

KEYWORDS: call center, emotions, satisfaction, waiting

INTRODUCTION

Call centers have been rapidly expanding over the past decades (Anton, 2000), and call centers lead to reduced costs and greater convenience for customers. They enable customers to lessen the time taken for each transaction due to less need for travel physically to office based services (Bennington, Cummane, & Conn, 2000). At the same time, the majority of complaints about call centers come from having to wait on the phone (Anton, 1996; Bennington, et al., 2000) and that can cause a negative impact on satisfaction with the service company.

Nowadays, customers demand not only quality but also speed (Katz, Larson, & Larson, 1991). In other words, even if customers are well provided with quality, they will not be satisfied if they have to wait for the service. In particular, this waiting experience can be worsened if customers call the company to make a complaint. Although companies are continuously seeking ways to speed up service, believing that waiting will lead to negative service evaluations (Taylor, 1994), companies cannot always eliminate waits. Nevertheless, they can make an effort to manage customers' perceptions and

reactions by providing an estimated wait time and understanding customers' needs prior to speaking with them; such as knowing the reason for the call.

There are several studies with regards to call center service satisfaction and waiting (Whiting & Donthu, 2009); the impact of call centers on service recovery (Mount & Mattila, 2000); satisfaction with call center service compared to in-person service (Bennington, et al., 2000); and customer expectations during voice-to-voice encounters (Dean 2004; Burgers, et al., 2000). However, little has been reported on different attributes that influence customer satisfaction with regard to call center wait times, especially in the hospitality industry. The purpose of this study is to examine when an estimated wait time is provided to the caller and the reasons for the call is known to call center employees, how the waiting experience affects customer satisfaction with a service provider.

LITERATURE REVIEW

Call center

Businesses have rapidly implemented call centers over the past decades to meet their customers' needs (Anton, 2000) as they become interested in providing information and assistance to existing and prospective customers (Aksin, Armony, & Mehrotra, 2007). Call centers help a company to build, maintain, and manage customer relationships by solving problems and resolving complaints quickly, having information, answering questions, and being available usually at any time; from anywhere; in any form; and for free (Anton, 2000; Prahabkar, et al., 1997). Call centers have the potential to be the primary focus of successful customer relationship management strategies (Mitchell, 1998).

In recent years, call centers have been equipped with technology solutions that noticeably improve their ability to handle the demand for information (Anton, 2000), and the consolidation of call centers has become economical to businesses as the costs of telecommunications and information technology have simultaneously decreased (Aksin, et al., 2007).

With growing numbers of customers making use of call center operations, the primary function of call centers has become to provide customers instant access answering questions and assisting with problems (Aksin, et al., 2007). For example, customers contact call centers when they have a question, want the company to do something, need assistance and guidance in resolving a problem, and are emotionally upset with the product or service, and want to know that the company will set the situation straight (Anton, 2000). Call centers operate by receiving telephone calls that have been initiated by customers, and such functions, known as "inbound" call centers, are the primary topic of this paper.

Waiting

While call centers are expected to benefit customers to lessen the time taken for each transaction (Bennington, Cummane, & Conn, 2000; Lovelock, 1997), the majority complaints with call centers come from having to wait on the phone (Anton, 1996; Bennington, et al., 2000). The concept of how to spend time wisely has become essential since customers have fewer nonworking hours and value their free time more (Katz, et

al., 1991); therefore, customers want to avoid the time they spend in nonproductive activities such as waiting. Even if customers are well provided with a product or service, customers will not be satisfied if they have to wait too long for the service. In fact, some people hate waiting so much that they pay other people to wait for them (Geist 1984; Taylor, 1994). "Waiting is a complex phenomenon to which a consumer often reacts in an emotional way. Waiting is often psychologically painful, because it causes us to renounce more productive and rewarding ways of using our time and because it may increase the investment that we have to make to obtain a product or service (Dube-Rioux, Schmitt, and Leclerc, 1989, p. 59)."

Waiting can be classified into three stages: pre-process waits, in-process waits, and post-process waits (Maister, 1985). For example, an individual's visit to a restaurant is divided into three relatively distinct phases (Dube-Rioux, et al., 1989): a pre-process phase refers to the moment from a customer's arrival at the restaurant until he or she orders the meal; an in-process phase includes placing orders and consuming the meal, and a post-process phase refers to the moment from paying the bill until the customer leaves the restaurant. In the current study, the term of waiting is exclusively defined as the pre-process phase when a customer is being placed on hold for some amount of time without receiving service until a next agent is available.

Speed of service is increasingly important in the service context (Katz, et al., 1991; Taylor, 1994) since customers demand both quality and speed (Katz, et al., 1991). The issue of how long the customer must wait to receive service determines the quality of the service (Aksin, et al., 2007). In the context of a call center, time is considered as an important variable of performance evaluation that includes talk time, handle time, queue time, wrap-up time and hold time (Anton, 1996; Burgers, et al., 2000). Yet, when customers call an inbound call center, they find themselves increasingly put "on hold" while waiting for a live agent to talk to on the phone (Tom, Burns, & Zeng, 1997). Even though various call handling and routing technologies attempt to route the call to an available agent, there is often no agent available to immediately answer the phone call, in which case the customer is typically put on hold and placed in a queue (Aksin, et al., 2007).

Customers do not want to be held up longer than they wish to be (Anton, 2000). In particular, customers expect to reduce the time taken for the service due to the ability of the newer technologies and the elimination of the need for travel to physical offices (Bennington, et al., 2000). Businesses are expected to have call centers with new technologies to facilitate greater effectiveness and efficiency (Prabhaker et al., 1997) and to stream inquiries to unoccupied staff in different call centers, perhaps even in different parts of the country (Bennington, et al., 2000). Thus, customers will not tolerate waiting in line for a long time (Katz, et al., 1991).

Satisfaction, loyalty, and emotional responses

For decades, marketers have devoted a great deal of attention to manipulating the service experience and measuring service satisfaction. The centrality of the concept is reflected by the impression that profits are generated through the satisfaction of customer needs and wants (Churchill & Surprenant, 1982). Call centers handle various issues

ranging from complaint resolution to order taking, and they have become a critical touch point for managing and increasing customer satisfaction (Anton, 1996). Therefore, the interaction with call centers can determine overall service quality with the company (Aksin, et al., 2007; Bowen & Lawler, 1992) and build, maintain, and manage customer relationships (Bettencourt & Brown, 1997).

From the previous studies, it is apparent that waiting for service is negatively correlated with service satisfactions. For many customers, the waiting experience is a disagreeable, frustrating, annoying, aggravating, stressful, intolerable, and anxiety producing (Davis, 1986; Dube-Rioux, Schmitt, & Leclerc, 1989; Katz, Larson, & Larson, 1991; Maister, 1985; Scotland 1991; Taylor, 1994; Taylor 1995). Several factors that influence the impact of waiting on service satisfactions have been studied. These factors include emotional reactions to the wait (Dube-Rioux, et al., 1989; Katz, et al., 1991; Larson, 1987; Taylor, 1994); perceived unfairness in the wait (Larson, 1987); the actual time of the wait (Dube-Rioux, et al., 1989), how callers were occupied during the wait (Haynes 1990; Katz, et al., 1991; Larson 1987; Taylor 1994; Taylor, 1995); and the perceived level of service provider control over the wait (Taylor 1994; Taylor, 1995).

Moreover, beyond satisfaction and emotional responses, customer loyalty is viewed as the strength of the relationship between individual's relative attitude and repeat patronage (Dick & Basu, 1994). Previous literature suggests that there is a positive relationship between customer satisfaction and customer loyalty (Kandampully & Suhartanto, 2000). For example, customers' intentions to recommend the lodging to prospective customers are a function of their perception of both their satisfaction and service quality with the lodging experience (Getty & Thompson, 1994).

In particular, call center customers do not have visual cues as to what is actually happening at the call center (Bennington, et al., 2000), thus leading to anxiety when their waiting is perceived to be too long. In fact, customers become frustrated by having to deal with technology and prerecorded voices rather than people (Prendergast & Marr, 1994). The qualitative data from Bennington and others (2000) introduced irritants that customers have to endure with call centers. This includes the lack of personalized service, having to wait on the telephone, uncaring communication, getting the "run around", the complexity of the telephone system, and unreliable information and service. Unlike manufactured goods, services are produced, delivered, and consumed during a single encounter.

Although Argyle (1994) argued that our true emotions are more likely to be picked up through voice only, it is difficult to build customer relationships without face-to-face interaction (Crome, 1998) such as with call center customers with no visual or other cues, as to what is actually happening at the call center (Bennington, et al., 2000). In fact, a previous study reveals that more than 60 percent of customers prefer face-to-face interaction rather than voice-to-voice interaction (Centrelink, 1998). Thus, it is critical to understand the experience of waiting in order to attain customer satisfaction (Haynes, 1990).

Companies are continuously seeking ways to speed up service, believing that waiting will lead to negative service evaluations (Taylor, 1994). Even though companies cannot always eliminate waits, they can make an effort to manage customers' perceptions and reactions by providing distractions, by apologizing, and by training contact employees to deliver excellent service (Houston, Bettencourt, & Wenger, 1998).

Understanding customers' satisfaction, loyalty, and emotional responses to wait situations represent complex phenomena because they depend on several factors. These factors include the outcome of the encounter (Spreng, Harrell, & Mackoy, 1995), the purpose of the trip (i.e. leisure or business), a customer's history with the firm (Megehee, 1994), the point of delay (Dube-Rioux, et al., 1989), the type of recovery effort (i.e., an apology, monetary compensation, etc.), and service criticality (Webster & Sundaram, 1998). In this study, two situational factors that may influence customers' responses will be examined: an estimated indicator of wait time information and the reason for the call.

Proving an estimated waiting time

According to Maister (1985), unknown waits seem longer than known waits. Being in an unstructured or uncertain surrounding is an unpleasant experience because it is not clear whether a certain action will lead to or away from a goal (Dube-Rioux, et al., 1989). Customers would feel better when they are provided information that enables them to estimate their waiting time, thus reducing uncertainty (Larson, 1987). Therefore, it is suggested that providing an estimated waiting time would positively influence service performance satisfactions.

In particular, Maister (1985) recommended managing expectations and perceptions of customers by overestimating the wait time duration. When customers expect a longer wait for service, they may be satisfied when the wait is not as long as expected (Haynes, 1990). For example, customers will be happier and more satisfied when restaurants set a "long wait" expectation and then serve them earlier than the expected time. In contrast, if customers have to wait more than expect, then customers will be dissatisfied.

Providing an estimated waiting time will not only set an expectation for the customer but also distributes the responsibility of the wait to the customer to some extent. Social Psychology theories help predict the nature of consumer attributes in service encounters. For example, when an employee provides an external explanation for service failure by placing the blame on something or someone other than her/himself or the firm, the explanation is likely to lead the customer to believe the firm had less control over the failure than when an internal explanation (one in which the employee implicates her/himself or the firm) is provided (Bitner, Booms, & Tetreault 1990). Similarly, it is plausible that providing an estimated wait time may lead the customer to attribute greater control to the service experience. When an estimated wait time is given, it becomes a customer's choice whether to wait or hang up. If a customer chooses to wait on the phone, they may feel partly responsible when the chosen wait time does not fully live up to their expectations, thereby mitigating the impact of dissatisfying experiences. Thus, satisfaction and emotional responses would not be negatively affected by the wait. Furthermore, providing an estimated time can be a commitment to some extent (Taylor, 1994), and such commitment may contribute to customer satisfaction and result in a positive perception of the business.

In particular, telephone customers don't have physical or visible cues as to what's going on, so waits are likely to be difficult to tolerate since there is little way to judge the probable length of the wait for service (Haynes, 1990). Thus, customers would feel better when they are provided information that enables them to estimate their waiting time, thus

reducing uncertainty (Larson, 1987). It is argued that customers will be more satisfied with a business that provides a correct estimated time than one that provides none or a wrong estimated wait time.

H1: There is a difference in customers' satisfaction, loyalty, and negative emotional responses depending on the type of waiting time information given. With a business that provides a correct estimated time, customers' satisfaction, loyalty, and emotional responses will be higher, compared to one that provides none or a wrong estimated wait time.

Reasons for calling

Customers' evaluation of satisfaction, loyalty, and emotional responses can be influenced by the reasons for calling: to complain, to make a reservation, or to obtain information. When a purchase occasion is considered very important, customers are likely to view it more seriously than when service purchase is less critical (Ostrom & Iacobucci, 1995). Once a service failure occurs, customers' satisfaction and future purchase intentions are influenced not only by the initial consumption of the service, but also by the nature of the activities performed by service providers (Gilly & Gelb, 1982; Spreng, Harrell, & Mackoy, 1995).

Even if service recovery might not lead to entirely changed opinions about the service provider, customers might be willing to give a company another chance in the case of an effective recovery (Mount & Mattila, 2000). However, poor service recoveries aggravate already low customer satisfaction and loyalty responses following a service failure, producing a "double deviation" effect that is defined as a perceived inappropriate and/or inadequate response to failures in the service delivery system (Bitner, et al., 1990). In our research context, double deviation scenarios represent situations where customers are disappointed with a service provider and their negative evaluation on satisfaction and loyalty can become much stronger if the firm fails in not only providing an instant service recovery through the phone but also provide the wrong estimated wait time.

If customers just have a question or want the company to do something, they may be more forgiving of the wait on the phone, when compared to them calling to complain about a service failure. In particular, customers who are emotionally upset with the product or service, and contact call centers seeking assistance in resolving a problem, and want to know that the company will set the situation straight. If the company fails in not only providing an instant service recovery through the phone but also providing a correct estimated wait time, then the customers' satisfaction, loyalty, and emotional responses can worsen, producing a "double deviation" effect.

H2: There is a difference in customers' satisfaction, loyalty, and negative emotional responses depending on the reason for calling. When customers contact call centers for assistance in resolving a problem, their satisfaction, loyalty, and emotional responses may deteriorate with businesses that provide a wrong estimated time, when compared to those who call only to ask a question.

While the academic literature has neglected the field of service quality in the context of a voice-to-voice encounters, customers in the airline industry often call to make reservations, to search out information, and to solve problems. The current study takes place within an airline call centers that is maintained and used by an organization to route and handle its phone calls. Airline call centers sit between the users of an organization and the phone company, allowing the organization to operate more efficiently than it would if each user had a normal telephone on their desk. Based on the above discussion, these research questions will be examined using an experiment involving pre-process waiting in the call center context. The conceptual framework is shown in Figure 1.

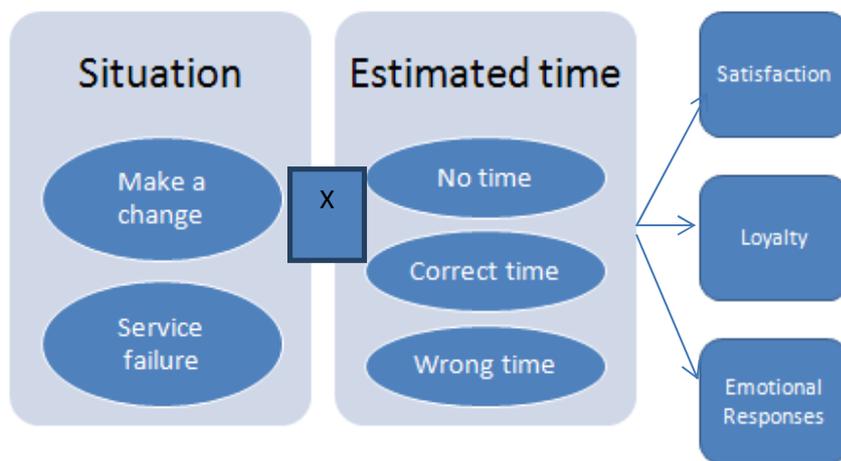


Figure 1. Conceptual framework of the study

METHODOLOGY

A 2 x 3 experimental design will be used to examine if estimated time information and the reason for calling influences the outcome measures. A 200 response convenience sample of college students will be used for the study. Reasons for calling (general situation and service failure situation) and estimated waiting time (none, correct, and wrong estimated time given) are used as independent variables.

Manipulation check

Estimated waiting time and reason for calling manipulations will be checked to ensure the scenario manipulations. The realism of the scenario will be asked to participants as well.

Dependent variables

Participants will be asked to read a scenario of a call center waiting experience. Subsequently, they will be asked to rate their overall satisfaction, loyalty, and emotional responses measured by using multiple items. The six items used to measure customer *satisfaction* are derived from past service customer satisfaction studies (e.g., Bolton and Drew, 1991; Dwyer, 1980). The six customer *loyalty* items deal with multiple dimensions of loyalty, (i.e., repatronage intentions, willingness to recommend the services to others, positive word-of-mouth, and firm image) (Dick and Basu, 1994). Lastly, the ten items used to measure *emotions* are adopted from Edwardson's (1998) (i.e. angry, happy, frustrated, annoyed, disappointed, satisfied, impatient, relaxed, excited, and irritated). All items will be measured with 5-point, Likert scales with anchors of 1 = strongly disagree and 5 =strongly agree.

Subjects will be randomly assigned to one of the six experimental conditions. Other factors that may possibly influence subjects' responses will be controlled. Specifically, the physical comfort provided during the delay, the social surrounding during waiting, the cost of alternative time allocation, the amount of excuse and explanation provided, and the individual's need will be held constant in the different scenarios. In each scenario, after the delay occurs, the service person apologizes for the delay and provides the service. By apologizing, service providers will communicate their recognition of the delay and their concern (Taylor, 1994) to control some variables that may be mediated from the situation when an apology is not given.

EXPECTED RESULT

It is expected that customers will be more satisfied with businesses that provide a correct estimated waiting time compared with companies that do not or who provide a wrong estimated time in a call center context. When customers expect a longer wait for service, they may be satisfied when the wait is not as long as expected. Therefore, it is expected that airlines that provide overestimated wait times would result more satisfied, loyal customers, compared to ones that provide underestimated wait times in queue. Moreover, it is expected that when waiting occurs, customers who contact the call center to make a complaint will be less satisfied than those who call to ask general information.

IMPLICATIONS AND LIMITATIONS

The current study would link the relationship between the waiting experience and satisfaction, loyalty, and emotional responses within the context of call centers. If service providers have some knowledge of the factors that influence consumers' reactions to waiting, they will be in a position to decrease the negative impact of waiting. Many customer contacts occur through call centers and the image of the company from the customer's eyes can either be diminished or enhanced from interactions with a call center. Even though this study tries to minimize biases, it still has some limitations. First, a college student sample was used for convenience, so it may not represent the population as a whole. Second, other factors that may possibly influence subjects' responses are not counted such as the social surrounding during waiting and the cost of alternative time allocation.

REFERENCE

- Aksin, Z., Armony, M., & Mehrotra, V. (2007). The modern call center: A multidisciplinary perspective on operations management research. *Production and Operations Management Society*, 16(6), 665-688.
- Anton, J. (1996). Call center management by the numbers. Press on Regardless: Santa Maria, CA.
- Anton, J. (2000). The past, present and future of customer access centers. *International Journal of Service Industry Management*, 11(2), 120-130.
- Argyle, M. (1994). *The Psychology of Interpersonal Behaviour*, (5th ed.). Penguin, London.
- Bennington, L., Cummane, J., & Conn, P. (2000). Customer satisfaction and call centers: an Australian study. *International Journal of Service Industry Management*, 11(2), 162-173.
- Bettencourt, L. A., & Brown, S. W. (1997). Contact employees: Relationships among workplace fairness, job satisfaction and prosocial service behaviors. *Journal of Retailing*, 73(1), 39-61.
- Bolton, R. N. & Drew, J. H. (1991). A multistage model of customers' assessments of service quality and value, *Journal of Consumer Research*, 17, 375-384.
- Bowen, D. E., & Lawler, E. E., III. (1992). The empowerment of service workers: What, why, how, and when. *Sloan Management Review*, 33(3), 31.
- Burgers, A., Ruyter, K. D., Keen, Streukens, S. (2000). Customer expectation dimensions of voice-to-voice service encounters: a scale-development study. *International Journal of Service Industry Management*, 11(2), 142-161.
- Centrelink (1998). Strategic Outlook Report, Centrelink, Canberra.
- Churchill, G. A., Jr., & Surprenant, C. (1982). An investigation into the determinants of customer satisfaction. *Journal of Marketing Research*, 19(4, Special Issue on Causal Modeling), pp. 491-504.
- Crome, M. (1998). Call centers: battery farming or free range?", *Industrial and Commercial Training*, 30(4), 137-141.

- Davis, Mark Manrice. 1986. A Study of the Relationship between Customer Satisfaction and Waiting Time and Its Impact on Worker Requirements in a Fast Food Operation. Published Dissertation. Ann Arbor, MI: University Microfilms International.
- Dean, A. M. (2004). Rethinking customer expectations of service quality: are call centers different? *Journal of Services Marketing*, 18(1), 60-77.
- Dick, A. S. & Basu, K. (1994). Customer loyalty: Toward an integrated conceptual framework. *Journal of the Academy of Marketing Science*, 22(2), 99-113.
- Dubé-Rioux, L., Schmitt, B. H., & Leclerc, F. (1989). Consumers' reactions to waiting: When delays affect the perception of service quality. *Advances in Consumer Research*, 16(1), 59-63.
- Dwyer, F. R. (1980). Channel-member satisfaction: Laboratory insights. *Journal of Retailing*, 56, 45-65.
- Edwardson, M. (1998). Measuring emotions in service encounters: An exploratory analysis, *Australasian Journal of Market Research* ,6,2, 34-48.
- Getty, J. M. & Thompson, K. N. (1994). The relationship between quality, satisfaction, and recommending behavior in lodging decision. *Journal of Hospitality & Leisure Marketing*, 2 (3), 3-22.
- Gilly, M. C. & Gelb, B. D. (1982). Post-Purchase Consumer Processes and the Complaining Consumer. *Journal of Consumer Research*, 9, 323-328.
- Haynes, P. J. (1990). Hating to wait: Managing the final service encounter. *The Journal of Services Marketing*, 4(4), 20.
- Houston, M. B., Bettencourt, L. A., & Wenger, S. (1998). The relationship between waiting in a service queue and evaluations of service quality: A field theory perspective. *Psychology & Marketing*, 15(8), 735-753.
- Katz, K. L., Larson, B. M., & Larson, R. C. (1991). Prescription for the waiting-in-line blues: Entertain, enlighten, and engage. *Sloan Management Review*, 32(2), 44.
- Kandampully, J. & Suhartanto, D. (2000). Customer loyalty in the hotel industry: the role of customer satisfaction and image. *International Journal of Contemporary Hospitality Management*, 12 (6), 346 – 351.
- Larson, R. C. (1987). Perspectives on queues: Social justice and the psychology of queuing. *Operations Research*, 35(6), 895-905.
- Lovelock, C.H. (1997). Classifying services to gain strategic marketing insights, in Gabbott, M. and Hogg, G. (Eds), *Contemporary Services Marketing Management: A Reader*, The Dryden Press, London.

- Maister, D. (1985). The psychology of waiting lines, in Czepiel, J., Solomon, M. and Surprenant, C. (Eds), *The Service Encounter*, Lexington Books, D.C. Heath and Co., Lexington, MA.
- Megehee, C. (1994). Effects of Experience and Restitution in Service Failure Recovery, in *Enhancing Knowledge Development in Marketing*, vol. 5, Ravi Achrol and Andrew Mitchell, eds., American Marketing Association, San Francisco, CA. 1994, pp. 210-216.
- Mount, D. J. & Mattila, A. (2000). The final opportunity: The effectiveness of a customer relations call center in recovering hotel guests. *Journal of Hospitality & Tourism Research*, 24(4), 514-525.
- Ostrom, A. & Iacobucci, D. (1995). Consumer Trade-Offs and the Evaluation of Services. *Journal of Marketing*, 59, 17-28.
- Prahabkar, P.R., Sheehan M.J., & Coppett, J.I. (1997). The power of technology in business selling: call centers. *Journal of Business and Industrial Marketing*, 12, 222-235.
- Prendergast, G. & Marr, N. (1994). Towards a branchless banking society?", *International Journal of Retail & Distribution Management*, 22(2),18-26.
- Scotland, R. (1991). Customer service: A waiting Game. *Marketing*, 1-3.
- Spreng, R., Harrell, G. D., & Mackoy, R. D. (1995). Service recovery: Impact on satisfaction and intentions. *The Journal of Services Marketing*, 9 (1), 15-23.
- Tom, G., Burns, M., & Zeng, Y. (1997). Your life on hold. The effect of telephone waiting time on customer perception. *Journal of Direct Marketing*, 11(3), 25-31.
- Taylor, S. (1994). Waiting for service: The relationship between delays and evaluations of service. *The Journal of Marketing*, 58(2), pp. 56-69.
- Taylor, S. (1995). The effect of filled waiting time and service provider control over the delay on evaluations of service. *Journal of the Academy of Marketing Science*, 23, 38-48.
- Webster, C. & Sundaram, D. S. (1998). Service consumption criticality in failure recovery. *Journal of Business Research*, 41, 153-159.
- Whiting, A. & Duthu, N. (2009). Closing the gap between perceived and actual waiting times in a call center: results from a field study. *Journal of Service Marketing*, 23(5), 279-288.

Preliminary Analysis of the Nature of Boutique Hotels

Lilu Gao
Hospitality and Tourism Management
Purdue University, USA

Jonathon Day
Hospitality and Tourism Management
Purdue University, USA

ABSTRACT

The growth of the boutique hotel segment of the hospitality industry has been an important trend in recent years. Despite this growth, the definition of “boutique hotel” remains unclear. The review of key dimensions of the definition of “boutique hotels” from academic research between 2005 and 2009 shows the topic has received limited attention from academia. The review raises the question of whether research is keeping pace with the changes in the marketplace. The current research identifies key attributes of the boutique hotel accommodation concept and clarifies a definition of “boutique hotel” based on the current usage of the term. In particular, the present research examines the current usage of the term “boutique hotel” in trade magazines to determine the operational definition of boutique accommodations. Grounded theory is used to develop the operational definition of “boutique hotel” and content analysis will be applied to examine the current usage of the term “boutique hotel” in travel trade publications in the United States. Six magazines serving the hospitality industry were chosen for the study, three lodging publications and three travel trade publications. A sample of articles and editorials including the key word “boutique hotel” will be selected from each publication. The unit of the content analysis for trade magazines was select words or phrases in the six magazines. The result of this study of current usage of the term boutique hotel will provide a foundation for future study of this emerging sector of the hospitality industry.

KEY WORDS: Boutique Hotel; Content Analysis; Definition; Grounded Theory.

Introduction to Boutique Hotels

The “boutique hotel” phenomenon has grown in prominence in recent years, although branded hotels have dominated the lodging industry. In general, boutique hotels combine elements of design and service to differentiate their offerings to potential guests. The origin of the “boutique hotel” classification remains disputed. At least one industry expert considers that prior to the rise of Holiday Inn in the 1960s, every hotel can be treated as a boutique hotel while other sources suggest that boutique hotels were invented in the early 1980s

when Anouska Hempel designed Blake's in London (Brights, 2007). The definition of "boutique hotel" also has remained elusive, in part because each boutique hotel attempts to be unique and distinctive. As Hartesvelt (2006) noted, boutique hotels are somehow like art; it is more complex to build a boutique hotel than a branded hotel whose standards are highly researched. The recent success of "boutique hotels" is stimulating growth in this sector of the industry as more hotels seek to provide unique and hospitable accommodation experiences (Samadi 2010). Despite the challenges of defining "boutique hotels", the growth of this type of accommodation is creating a greater need for clearer definitions of what constitutes this type of lodging establishment.

The current research will identify the key attributes of the boutique hotel/accommodation concept and clarify a definition of "boutique hotel" based on the current usage of the term.

Boutique Hotel Definitions in Academic Literature

Although the concept of "boutique hotels" has existed for years, it has received little attention from hospitality academics with only a few researchers examining the role and nature of this type of accommodation. In 2005, McIntosh and Siggs defined the experiential aspects of boutique hotel from the perspective of both customers and management and noted that these two perspectives varied considerably. They found "unique" characteristics from a customers' perspective can be described as "something out of ordinary" whereas, from management's perspective, "unique" is more specific, for instance, historical building, decoration design, or alternative service. (McIntosh and Siggs 2005). In 2007, Aggett's research on Boutique Hotels in the United Kingdom identified five key attributes: location, quality, uniqueness, personalized service, and services provided showed a consistency with McIntosh and Siggs's earlier work (Aggett, 2007). Lim and Endean defined boutique hotels by dividing the characteristics into aesthetics (style location, type of building, design) and operational characteristics (ownership, classifications and grading, number of employees, and services provided). Lim and Endean combined previous literature review, an investigation of boutique hotel websites and interviews to identify the definition of boutique hotel as follow: "*[they] are generally smaller in size, with less than 100 rooms; are not part of a large chain; are generally located in urban or city centers; will generally have an historical or other interesting aspect associated with the building; are individual in design with an emphasis on personal service; include a good quality restaurant as an integral feature; are three-, four-, or five-star rate.*" (Lim and Endean, 2009) Although there is no universally accepted definition, a review of the key dimensions of the definitions from academic articles from 2005 to 2009 of boutique hotels include "size", "individual", "location", "quality", "design", "unique", and "personal service". The limited academic attention applied to this topic raises questions as to whether research is keeping pace with the changes in the marketplace. The present study will examine usage of the term "boutique hotel" in current travel trade publications to assess the validity of contemporary academic definitions in light of the increasing use of the term.

PROPOSED METHODOLOGY

The aim of the current study is to determine an operational definition of the term “boutique hotel” based on its current usage in travel trade publications. The study uses a grounded theory approach to develop the operational definition of “boutique hotel”.

Content analysis will be employed to examine the current usage of the term “boutique hotel” in travel trade publications in the United States. Six trade magazines serving the hospitality industry will be chosen for the study, three lodging publications and three travel trade publications. A sample of articles and editorials including the key word “boutique hotel” will be selected from each publication. Content analysis is a study of recorded human communication. The subject of such a study can be books, magazines, web pages, poems, newspapers, songs, paintings, speeches, letters, e-mails, bulletin board postings on the internet, laws and constitutions as well as any components of collections. It is usually used to answer the questions: “Who says what, to whom, why, how, and with what effect?” (Babbie 2002) In the present study, the unit of the content analysis for trade magazines was select words or phrases in the six magazines. Both manifest content and latent content are used in the study. Manifest content is a more visible content and will be used to identify the characteristics of boutique hotels based on the frequency of the key words in each unit. Latent content will be used to supplement the findings of the manifest content analysis (Babbie 2002). Grounded theory is applied to the qualitative data analysis (Berg 1989) to determine the current operational definition of the term.

SIGNIFICANCE AND LIMITATIONS OF THE STUDY

A clear definition of boutique hotels will provide a foundation for future studies of this lodging segment. The growth of interest in “boutique hotels” has been one of the hottest topics in recent years and this trend is likely to continue. One should note that boutique hotels are a good investment when properly designed, positioned, marketed, and perhaps - most importantly - operated (Watkins, 2009). As such, future researchers in this specific area of the lodging industry have several rich fields of discovery including consumer behavior, marketing, and operational studies. The development of a shared understanding of the key attributes of “boutique hotels” will strengthen the foundation of future studies in the field.

All research has some limitations. This paper’s result is only based on literature review of academic journals and content analysis of American-based hospitality trade magazines.

RECOMMENDATIONS FOR FUTURE STUDY

The current study examines the nature of “boutique hotel” from academic and industry perspectives. Future study of boutique hotels from the guest perspective is recommended.

REFERENCES

- Aggett, M. (2007). *What has influenced growth in the UK's boutique hotel sector?* International Journal of Contemporary Hospitality Management. 19: 169-177.
- Babbie, E. (2002). *Content Analysis. The Basics of Social Research*, Wadsworth Thomson Learning. Second edition: 312-323.
- Berg, B. (1989). *Qualitative Research Methods for the Social Sciences*. Boston, MA., Allyn and Bacon. First edition.
- Brights, D. (2007). *The definition of boutique hotels*. Article Dashboard.
- Hartesvelt, M. V. (2006). *Building a Better Boutique Hotel*. Lodging Hospitality 62(14): 32-44.
- Lim, W. M. and M. Endean (2009). *Elucidating the aesthetic and operational characteristics of UK boutique hotels*. International Journal of Contemporary Hospitality Management 21(1): 38-51.
- McIntosh, A. J. and A. Siggs (2005). *An Exploration of the Experiential Natural of Boutique Accommodation*. Journal of Travel Research. 44: 74-81.
- Samadi, N. (2010). IBISWorld Industry Report 72111 Hotel & Motel in the US: Room for growth: The industry is poised for an upswing as consumers loosen travel budgets, IBIS World: 8.