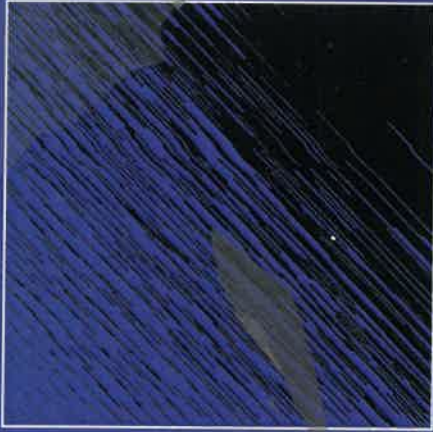


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## Editor's Dias

The present issue of journal provides conceptually sound, rich in imperial cases that highlights the current challenges in tourism. "An Analysis of Reviews on Travel Blogs to Determine the Frequency of Pests and Their Impact of Guest Loyalty: An Extension of Stance-Shift Analysis" Prof Crotts and Dr. Peyton Mason, have analyzed the incidences of a relative infrequent failure of hygiene in the hospitality and tourism industry - pest infestations - and their impact on customer loyalty with the purpose is to extend and demonstrate the methodology of stance-shift analysis where by large quantities of qualitative data is raked from internet travel blogs and analyzed quantitatively to address concerns in quality, service failures, and guest loyalty. Dr. Aswin Sangpikul in "A Comparative Study of Travel Motivations between Asian and European Tourists to Thailand" aims to examine and compare travel motivations of international tourists to Thailand between Asian and European tourists. The results indicated that travel motives of Asian and European respondents seemed to be similar in that most of them were more likely to be motivated by 'novelty seeking' when traveling overseas. However, there were some differences regarding the perceptions of destination attractions drawing them to Thailand. The results of the study provide practical implications that can be helpful for both policy makers and industry practitioners to develop appropriate marketing strategies and tourism products for the Asian and European travel markets. In "Infusion of the Internet and Indigenous Tourism: An Australian Framework" Dr. Hosein Gharavi, Dr. Alfred Ogle, Dr. Patricia Berwick evaluate that The Internet has enabled tourism and travel companies to tap into new domestic and international markets while availing regions in developing countries the opportunities to publicize their unique tourism products and services. They discuss how Increased exposure enables development of a truly indigenous experience? Initially Internet-assisted entry into global tourism is seen as the process of mimicking tourism practices established by developed regions.

With two objectives in "Does Tourist Satisfaction and Perception Change Over Time?: A Study on Spring Break Tourists in Negril, Jamaica" Dr. Youngsoo Choi and Harry Crissy confer the paper analytically. One on factors influencing the satisfaction level of visitors to Negril, Jamaica during spring break season in terms of the tourists' experiences in accommodations; activities; (perceptions of) the attitude of local people; attractions; and transportation. The second objective is to study the tourists' concern for the destination's environment in terms of their approval of environmental impact fees and collection methods. In "Managerial

Response To Global Tourism Trends In Accomodation: An Illustration From Two Destinations” Ruhet Genc and Ige Pinar from Turkey discuss in order to stand out from competition crowd in tourism and to appeal to the consumers with differential advantage, the hotel managers should try their best to keep up with constantly changing trends in tourism. They concentrate on the key trends in the global tourism market. It also tries to determine the level of response of top managers of 4 & 5 star hotels in two important tourism destinations in Turkey, namely Izmir and Kusadasi, to trends since though limitations the results of the study may be an indicator for the areas of improvement. Dr. Rania Abdelrahman from Egypt in "Opportunities and Challenges in Applying the Concept of 'Mass- Customisation' to the Diversified Tourist Image of Egypt: The Supply Sector Perspective" confers the concept of mass-customisation from the tourism supply sector viewpoint. He in this paper is trying to redress this shortfall through examining how the concept of mass customisation could be applied to the new diversified tourist image of Egypt. Author suggest that the exchange of experience and managerial knowledge between the public and private tourism sectors in Egypt from one side; as well as with the international tourism trade, from the other side; through undertaking joint marketing and segmentation studies should be a core criterion for the successful application of mass customization. In “Demographic and Economic Patterns in Italian Tourism in the Last Century” Prof. Galvani discusses how earlier form of social tourism has been modified from a health service into leisure and recreation public organizations are charged to provide public health, and when, at the end of the 19th century, doctors recognized that thalassic therapy for children could prevent adult diseases, local and national institutions created seaside resorts for children whose parents weren't able to afford a vacation. Today industrial evolution and social insurance allow people to work less and earn more, so almost all families have the means to take holidays all together. Most of the buildings, once able to recover hundreds of children, are now abandoned. The disappearance of the summer colonies, once seen throughout Western Europe, reflects these enormous changes and the passage from social to individual tourism. The feedbacks, suggestions, opinions for up gradation are openly invited for the beneficiation of its readers.

(Mukesh Ranga)



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# **An Analysis of Reviews on Travel Blogs to Determine the Frequency of Pests and Their Impact of Guest Loyalty: An Extension of Stance-Shift Analysis**

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**Abstract :** This study's purpose is twofold. First its purpose is to analyze the incidences of a relative infrequent failure of hygiene in the hospitality and tourism industry - pest infestations - and their impact on customer loyalty. Moreover its purpose is to extend and demonstrate the methodology of stance-shift analysis (Crotts, Mason and Davis 2009) where by large quantities of qualitative data is raked from internet travel blogs and analyzed quantitatively to address concerns in quality, service failures, and guest loyalty.

**Key Words:** Stance Shift Analysis, Pests, Service Failure, Loyalty, Travel Blogs

Often illustrated as the 10-10-10 rule, owners spend \$10 million purchasing and renovating a hotel or a resort to attract customers at a profit. In 10 minutes, the customer is driven away with a bad service experience, and you wait 10 years for another chance to win them back (Crotts and Ford 2008). Make no mistake about it, the tourism industry is competitive and service excellence, or failure, predicts a firm's future sales and profitability.

Consider for a moment the average family of four will spend returning to their favorite hotels and resorts in a 10 year period. Given that the typical upper-middle income family will take a one-week vacation and two to three short get away trips on a typical year, the average including lodging, and food and beverage can be \$3,800 per year or \$38,000 over ten years. We say "can be" because a bad experience can instantly stop that revenue stream. One bad experience can end the lifetime customer value for a business well before it comes anywhere close its true potential. Profitability

depends on maximizing the lifetime value of your customers, and that value is fully assured only when you earn the customer's loyalty. We define customer loyalty as: high return frequency and/or high likelihood to recommend to others. Building loyalty starts with a commitment to delivering excellence at every moment of truth and must extend from upper management to every frontline employee.

Guest experiences are complex phenomena. They involve a diverse array of amenities and service encounters, all influenced by the ours guests' high expectations. In today's competitive business environment, the ability to meet and exceed customers' expectations is a key determinant of guest satisfaction. In turn, guest satisfaction has a direct and positive impact on the economic viability of any hospitality organization. Thus, all firms should strive to meet and exceed visitor expectations in every aspect. Recognizing, however, that all hospitality managers have limited resources, each manager needs to make sure that his or hers primary focus and highest priorities are on its key drivers guest satisfaction (Ford and Heaton 1999; Crotts, Pan and Raschid 2008).

Therefore, the objectives of the astute hotel or restaurant manager are threefold:

- How satisfied are my guests?
- What are they telling others about their experiences?
- How is my property performing in areas where my guests have zero tolerance for mistakes?

Central to all of these objectives is the means to accurately and reliably measure critical incidences that will have a direct impact on customer loyalty. This study applies a research technique that we contend greatly enhances the value of qualitative data in exploring deeper into the consumer's mindset, and to identify those features of products and services which guests truly value. Stance-shift analysis has gone through a rigorous review process in a variety of settings (Crotts, Mason and Davis 2009, Lord, Davis and Mason 2008; Mason and Davis 2007; Maclagan and Mason 2005; Mason, Davis and Bosley 2005). We employ the research method to identify the frequency of pests encountered by hotel, resort and restaurant guests and the impact of those encounters on their loyalty (e.g., willingness to repeat purchase and recommend to others).

## **Background**

There are three areas of research which have influenced this research study. They are the research on customer satisfaction, service failure and recovery, and the emergence and importance of internet travel blogs.

### **Guest Satisfaction**

Consumer, or guest, satisfaction is one of the most enduring and well-researched areas in consumer behavior and tourism fields (Pizam, Neumann and Reichel 1978; Parasurman, Zeithaml and Berry 1988; Pizam and Ellis 1999, Crotts, Pan and Raschid 2008). Guest satisfaction has been defined as a post-consumption, evaluative judgment of a consumer concerning a specific product or service (Gundersen, Heide and Olsson 1996). It is a vague and hard to pin down construct that is based upon an individual's pre-purchase expectations and post-purchase quality perceptions (Parasurman, Zeithaml, and Berry 1985).

The factors that define guest satisfaction can be classified into three types, each having a different impact on guest satisfaction (Fuch and Weiermair (2003, 2004). They are factors that can increase a guest's overall satisfaction, those that only prevent the guest from feeling dissatisfied; and those factors that can work both ways. Matzler and Sauerwein (2002; pp. 318-319) define these types of factors influencing guest satisfaction as follows:

- Basic factors - guests regard these factors as being guaranteed by the service provider, with no need to request them specifically. If they are not fulfilled they lead to a high level of dissatisfaction although they do not increase satisfaction if they are not fulfilled. Cleanliness and hygiene, safety, and tranquility are known examples of basic factors.

- Performance factors- these are factors that increase satisfaction levels if they are fulfilled and reduce them if they are not. Climate, cuisine, and the availability of recreational amenities and their quality are examples.

- Excitement factors - these are factors that increase guest satisfaction if they are fulfilled but do not cause dissatisfaction if they are not. Interesting towns or city in which the hotel resides, chance to get to know other guests, and the little things hotel and restaurant employees do to create service surprise are but examples.

In times of economic slow downs where revenue is declining, it is the basic and performance factors that a manager must not overlook. The presence of pests (e.g., coach roaches, bus, spiders) is a basic factor that communicates to guests' poor cleanliness or sanitation that can lead to health and safety concerns; all understandably leading to dissatisfaction. The purpose of this study is to determine the presence of certain types on guests' repeat purchase intent and willingness to recommend.

## **Service Failure and Recovery**

Estimates are that businesses typically lose about 50% of their customers every five years for a variety of reasons. Service quality seminars are often introduced with statistics regarding the extensive negative word of mouth resulting from dissatisfied customers compared to many fewer positive referrals from those who are satisfied. The message is "Do everything we can to create delighted customers". While customer delight is the ideal, most organizations fail to realize 100% satisfaction. The multi-dimensional nature of the service encounter creates an environment where imperfections are the norm, not the exception (Mack, Mueller, Crotts and Broderick 2000).

A focus on continuous quality improvement is essential for firms to be competitive (Ford and Sherrill 1999, Stevens, Knutson and Patton 1995, Parasuraman, Berry and Zeithaml 1991). In order to balance the need for defect-free service and the inevitability of failure, organizations must be pro-active in anticipating likely areas of failures/complaints, taking appropriate steps to insure they do not occur, as well as anticipating the appropriate responses for recovery. While the task is large, failure to do so runs the risk of losing customers and generating negative word of mouth through a service failure. Some of the questions to be asked are: What critical encounters/service failures cause a customer to leave a familiar hotel/resort and seek new ones? Which failures can be recovered from and which cannot? What are the costs involved?

Several studies have dealt with categorizing service failures as well as recovery strategies (Mack, Mueller, Crotts and Broderick 2000, Hoffman and Chung 1999, Hoffman et al 1995 and Kelly et al 1993). Using the incident/failure categories of Bitner et al (1990), Hoffman et al (1995) indicated a higher level of customer satisfaction with successful recovery. However, some failures have been shown to be too severe to retain a

customer. In these cases, the effort management gives to recovery is not to win back the loyalty of the guest but to reduce their impulse to share the failure with others. Research has shown that a delighted guest will tell on average 10 other people about their delightful experience; while a dissatisfied guest will tell an average of 18 others. Moreover the ability to vividly to recall to other service failures can linger for years (Mack, Mueller, Crotts and Broderick 2000). In the case of extreme failures, a terrorist can be born where one dissatisfied guest can influence hundreds sometime thousands of others what a bad hotel or restaurant experience.

### **Beware of the Internet**

The popularity of travel blogs represent what Baker and Green (2005) describe as the most explosive outbreak of information the world has ever seen since the creation of the internet. Designed originally as a way for people to leave comments on web pages (aka, web logs, weblogs, or blogs), blogs have become a leading form of consumer to consumer (C2C) information source (Schmallegger and Carson 2008, Zhou, Fang and Whinston 2006). All the major travel internet booking systems such as Orbitz, Travelocity, and Hotels.com all have blogs where consumer's can read guest comments before they buy. In addition blogs such as Yipes.com and TripAdvisor.com are totally dedicated to such C2C communications. TripAdvisor in particular reports that their site routinely receives more than 20 million individual sessions per week by consumers planning their next trip and wishing to gain recommendations from recent visitors. By reviewing postings on any of these sites, one will readily see that many companies assign personnel to monitor and respond to any negative postings to their property, in order to control or limit the effects of negative postings on future visitations. Given that a consumer's perception is their reality, we applaud such an investment by such consumer-focused businesses.

Given that all blogging activities are created and consumed by bloggers, the two basic behaviors of bloggers are that of social interaction and information search (Kurashima, Tezuka and Tanaka 2005). In regards to why consumers contribute to blogs, Nardi, Schiano, Gumbrecht and Swartz (2005) found five basic motivations. They are to: document their life experiences; provide commentary and opinions; express deeply felt emotions; articulate ideas through writing; and to form and maintain community forums.

While Huang et. al. (2007) believe these motivations can be intertwined with one another, none rise to the level of being considered unethical or slanderous especially on professionally managed travel blogs. In regards to consumers who seek information from blogs, research has shown that these consumers consider travel blogs as credible as traditional word of mouth (Mack, Blose and Pan 2008). Moreover, this form of digitized word-of-mouth communication is gaining in popularity. Perseus (2005) reported that there are 31.6 million blogs on the internet, growing by an estimated 40,000 per day (Huang, Shen, Lin and Chang 2007), receiving 1.6 million postings daily (Perseus 2005).

Using blog postings as measures of critical incidences or service failures has limitations not unlike other guest feedback methods. Guest comment cards are commonly completed by 1% -3% of guests. Often they are completed by either highly satisfied or highly dissatisfied guests. In addition, the percentage of guests who complete and return guest satisfaction surveys can be low as well. Though the results produced from an analysis of travel blogs must be treated with some reservation as to their ability to describe the average guest experience, they are an important feedback tool in gauging customer satisfaction.

## **Purpose of the Study**

The purpose of this research was to identify the frequency of guests reporting the presence of pests encountered in 2008 at hotels, resorts and restaurants in the USA and the impact of those encounters on their loyalty (e.g., willingness to repeat purchase and recommend to others). In addition, the frequency of types of pests are isolated as well as what type of properties they are encountered are analyzed.

## **Method**

The blog search function of Google.com (<http://blogsearch.google.com>) was employed for the needed data. These blogs were raked aided by software of 3,200,497 blog postings in 2008 that contained key words hotel, motel, resort, and restaurant limited to locations in the US. Next these blog postings were keyword searched for each type of pest including all word deviations (e.g., bed bug, bedbug, bed bugs). This procedure allowed for



an assessment of the relatively frequency of pests in the database.

Next, 500 blog narratives were randomly selected from those narratives containing each types of pests for language analysis (Crotts, Mason, Davis 2009). This procedure allowed the researchers to analyze how the presence of specific types of pest would be correlated with loyalty intent (e.g., repeat patronage, willingness to recommend). In addition, for every narrative where a pest was encountered, a separate narrative on the same property was collected from the previous day, week or month where no pest was recorded to be able to isolate the unique effects on guest loyalty.

## **Results**

### **Hotels, Motels and Resorts**

Some 85,210 of the 2.89 million individual blog postings contained at least one of twelve types of pests yielding an incidence rate 1.47 percent. Approached from another perspective, one of nearly 70 blog postings contained a pest in the narrative. Table 1 reveals the frequency of each pest type across 11 categories of pests. Though not all the categories are mutually exclusive with one another (vermin, pests, insects) collectively they capture the encounters known guests had with pests.

The mention of bugs contributed most to the overall incident rates at 1.24 percent of all blogs posted. More descriptive terms to describe the pest were a fraction of one percent. Nevertheless, the mention of more specific terms of flies (.25 of 1%), roaches (.20 of 1%), and ants and spiders (.13 of 1% each) are prevalent in the database. Adding the incidence of rats and mice yields a relatively high incident rate (.29 of 1%).

Analysis of the subsample of hotel and resorts revealed that 61.5% of pest mentions were at the unrated to one- two diamond/star properties, 27.3% at three diamond/star properties, and 11.1% at four to five diamond/star properties. Though the data clearly reveals that no type of property is immune to infestations, the differences can be explained in two ways. First, the economy sector is the most prevalent type of hotels/motels in the US, followed by mid level and upscale, so one should expect a higher concentration in economy properties due to their sheer numbers. Secondly,

close inspection of the narratives revealed that economy properties can be in need of renovations more so than mid to upscale properties. By virtue of AAA and Mobile Club quality standards, properties in need of extensive renovations will have difficulty holding on to their 3 to 5 diamond/star ratings.

Table 1 : Hotel Frequency of Pests

Pest	# of Blog Narratives	% of Total 2,897,998 blogosphere
Bed Bug (s)	3651	.0012
Coach Roach(es), Roach(es)	5798	.0020
Rat(s)	4597	.0015
Mouse, Mice, Rodent(s)	4032	.0014
Vermin	198	.0000
Insect(s)	7849	.0027
Bug(s)	36002	.0124
Fly, Flies	7,463	.0025
Ant(s)	4026	.0013
Spider(s)	3977	.0013
Pest(s)	1855	.0013
Flea(s)	5202	.0018
Beetle(s)	560	.0002
Total	85210	.0147

## **Impact of Pest Infestations on Hotels/Resorts' Guest Loyalty**

A closer inspection of these 400 narratives revealed that guests who posted blogs were not mentioning a single ant, beetle or fly suggesting that most guests are guests have a reasonable tolerance for pests. Ants, flies, insects and fleas were all plural suggesting some level of infestation. However the presence of a single coach roach, bed bug, rat, mouse, or spider garnered the same negative reaction as multiple pests indicating low tolerances for these pests. Rat or mouse excrement evoked the same negative reactions as well. Virtually all of these infestations were reported

being indoors - in the guest rooms, hotel common areas, or food and beverage areas.

These same narratives were analyzed for language features to determine the willingness of the guest to stay again (repeat purchase) and/or recommend to others. A series of cross tabulations were performed on the infestation type on these loyalty measures (See Table 2). In all but one case, guests reported zero tolerance for all pests. In this one case, the blogger noted a high outbreak of flies at a river front 3 diamond hotel that negatively impact the guests from taking walks and lounging at the pool, but considered the incident was outside the control of management and that it would not impact their decision to come again.

The strong measurable effect of any pest regardless of hotel type is significant and without counterparts in the service failure and recovery literature. In these cases, the infestations were virtually all reported to management and still the recovery strategy (e.g., apology, switching the guest to another room, discount, refund) had no effect on their loyalty. Unlike a rude employee, a meal served cold, or a broken air conditioner, observing a pest was deemed a failure that management could not overcome. The presence of pests in a single room casts a shadow over an entire property that the entire facility is unclean or unhealthy.

As planned a second narrative from each property was drawn from the available blogs to determine if the presence or lack of a pest sighting was the sole cause of the poor loyalty measures. Care was taken to selected a blog posting on each property that pre-dated by a day, week or month the blog posting where a pest was found to limit the potential of a hotel's management posting a deceptive evaluation to counter the negative evaluation. The analysis of these cases was conducted by the type of hotel or resort.

Among blog contributors who reported no pests while staying at the same 4 to 5 diamond/star hotel and resorts, a high 92.7% were characterized as loyal (e.g., either strong repeat purchase intent and/or willingness to recommend). This provides evidence that these upscale properties deliver an excellent guest experience, but one whose ability to drive loyalty is dependent on maintaining a pest free environment.

Similar but less robust results were produced from the analysis of three diamond/star properties. Without the presence of pests, these properties garnered loyalty from 74.7% of their guests; with the presence of pests the loyalty measure was reduced to less than 1%.

Table 2: Impact of infestation on hotel guest loyalty

Pest	Will stay again or recommend to others	Will not stay again or recommend to others
Bed Bug (s)	0%	100%
Cockroach(es), Roach(es)	0%	100%
Rat(s)	0%	100%
Mouse, Mice, Rodent(s)	0%	100%
Vermin	0%	100%
Insect(s)	0%	100%
Bug(s)	0%	100%
Fly, Flies	5%	95%
Ant(s)	0%	100%
Spider(s)	0%	100%
Pest(s)	0%	100%
Flea(s)	0%	100%
Beetle(s)	0%	100%
Total	0%	100%

Regarding unrated to one to two diamond/star properties, the results indicated that these properties have much room for improvement. In the cases without pests, the loyalty measures were 48.4%. Nevertheless, where pests were reported loyalty was reduced to an absolute 0%.

## **Restaurants**

An analysis of 302,499 blog narratives on US restaurants revealed the incidence rate of individual blog postings of pests in restaurants was lower than lodging establishments. In all 0.5% of restaurant postings contained encounters with one of eight types of pests, which as approximately three

times lower (1.47%) than that of lodging establishments.

The incidence of restaurants may seem low except that:

- Pests in restaurants are more often found in the back of the house where they are not always visible to guests; and
- Restaurants by law are required to pass health and sanitation inspections that are focused on pests and the contamination hazards, heading off such problems often before they become visible to restaurant patrons in the front of the house.

Ants (.0013%), Flies (.001%) and Insects (.001%) were the most frequently encountered pests and tend to trace to dining outdoors (See Table 3). In these situations customers were not complaining about a single ant or fly, but an infestation of pests from their perspective are out of control.

**Table 3: U.S. Restaurant Pest Infestation Incidence**

Pest	# of Blog Narratives	% of Total 302,499 Blogsphere
Cockroach/Roach(es)	273	0.0009
Rat(s)/Mouse/Mice	184	0.00061
Rodent(s)	15	0.00005
Vermin	7	0.00002
Insect(s)	320	0.00106
Ant(s)	379	0.00125
Fly/Flies	345	0.00114
Spider(s)	48	0.00016
Total	1571	0.0052

### **Impact of Pest Infestations on Guest Loyalty to Restaurant**

When a pest is encountered by a restaurant guest, the overwhelming majority (87%) would not dine again nor recommend the restaurant to others. This rejection for pests is 62% greater than if no pest was detected (See Table 4)

**Table 4: Impact of infestation of restaurant customer loyalty Recommend restaurant after encountering pest N=100**

Pest Encounter	Yes	No	Total
Yes Pest	13%	87%	100%
No Pest	75%	25%*	100

\* Not recommended due to food, atmosphere, service, price, etc.

For those guests that went on to recommend a restaurant after reporting a pest (13% of the sample); observing a roaches (43%) or ants (36%) did not deter their willingness to dine again or recommend (See Table 5). Anecdotally, if the pests are not in close proximity to the guest's table or in unavoidable direct view ( i.e., on the wall), then they were forgiving. That is, if the restaurant was outstanding in other areas such as food, service, ambiance, the service failure was recoverable.

Table 5: Loyalty to restaurant after encountering pest by type N=14

Pest	Yes
Cockroach, Roach(es)	43%
Rat(s), Mouse, Mice	0
Bug(s), Insect(s)	7
Fly, Flies	14
Ant(s)	36
Pest(s)	0
Total	100

Regardless of the expensiveness of the restaurant, when a pest is present the potential for a positive recommendation was severely diminished. Interestingly, while not statistically significant, guests dining at the most expensive restaurants appear to be a little more tolerant than those eating at the lesser ones (See Table 6). Again, this tolerance may stem from the exceptional food, service and ambience that are emphasized by the fine dining restaurants that at times will help them recover from a single critical incidence (e.g., encounter with a pest).

Table 6: Willingness to dine again and recommend restaurant by expensiveness after encountering a pest N=100

Expensiveness	Yes	No	Total
\$	5%	95%	100%
\$\$	13	87	100
\$\$\$	10	90	100
\$\$\$\$	25	75	100

Nevertheless, when a pest is encountered, the willingness of a restaurant patron to dine again and recommend to others is diminished by more than



50% regardless of the quality of the food, service, and surroundings (Compare Table 6 and 7).

Table 7: Recommend restaurant by expensiveness when no pest is encountered N=100

Expensiveness	Yes	No	Total
\$	76%	24%	100%
\$\$	63	37	100
\$\$\$	87	13	100
\$\$\$\$	79	21	100
Total	75	25	100

### Under the Numbers Looking at Stance and Semantics

Stance is the continuous, emotional or evaluative use of language, keyed to the patterning of value-laden words and arrangements of different parts-of-speech. Stance analysis allows us to identify writers/speakers' affect, intensity, and certainty toward a topic; *their stance signals their emotional reaction to content being discussed*. Stance analysis methodology charts the ways speakers or writers shift their stance on issues by taking responsibility for their opinions, "owning" their feelings, and giving personal reasons for their opinions and intended actions.

We add a second step by analyzing semantic concepts in those segments of the reviews in which the writer expressed a high degree of stance. This step categorizes words into key concepts to isolate salient reviewer thoughts toward the hotel or restaurant under review. The approach identifies the larger, overall important themes in the narratives.

### The analysis -pest versus no pest

Bloggers who posted evaluations of hotels and restaurants without pests were significantly more likely to mention dining, meals, and specific foods, as well as significantly more likely to use praise- and delight-words (*great, terrific, good*). Those that were afflicted by pests referred to disease, to what diners/vacationers saw - waste, garbage, living creatures (insects, vermin) moving about where they should not have been, and their immediate dislike.

Blog entries about both hotels and restaurants without pests were also significantly more likely to use personal names, generally pinpointing locations, and the pronoun "you." You in these blog writings has two functions: (1)

direct address, as in You need to know about this-you'll love it, and more typically as (2) an indirect reference to self: what I say you want is actually what I want. You was proportionally and significantly used more frequently by writers about hotels and restaurants without pests.

In general, the "stories" containing "you" for hotels and restaurants without pests were often rather general, and covered a wide range of events - where *you* go, what *you* might like - while the uses of *indirect-you* in writings about hotels and restaurants with pests were specific identifiers of pests and vermin.

### **An example from Hotels with pests:**

*It 's not a visit to NYC unless you run into some ghastly bugs or vermin.*

An example from Restaurants with pests:

*Something crawling from the kitchen . You guessed it, it's a rat!*

In short, while praise-words, like indirect references, can tell a generic story of pleasure, the words in entries mentioning pests and vermin are used to tell a specific story of blame and disgust involving flies, rats, insects, bugs, and most frequently, roaches.

Disgust is not too strong a word to characterize writer reactions: the stance of affect takes on a much stronger and proportionately more frequent role in distinguishing writings about hotels and restaurants with pests, from those which are vermin-free, using words such as *awful*, *dirty*, *disgusted*, *sh\*\*\*y*, *disgusting* and *horrible/horribly*. Such words generally lead into statements such as:

*Doesn't matter though, I'm never going back. And I'd warn you not to even bother.*

Customers reported that they were slightly mollified by efforts of hoteliers and restaurateurs who apologized, changed tables, brought free food, but were still reluctant to eat the food or to return; customers in situations where the management denied the presence of an insect wrote repetitive, angry sentences, emphasizing their affect for the reader.

What about the ways the stances shifted in the two sets of blogs, those about places with pests and those about places without them? How does the story change?

- Blog entries for restaurants without pests spend their energy on giving elaboration to explain their opinions: X has a "charming atmosphere," Y used to have great burritos but now the menu has changed. Affect is seldom

invoked, and when the stance does change from giving opinions and rationales to signaling affect, it is in the spillover from reporting the restaurant as a high point in a wonderful day as a tourist - weather, destinations, and events were all great, and the meal topped it off.

- Blog entries for hotels without pests again spend their energy on giving elaboration to explain their opinions, but they are more critical: at the outset of the trip, the décor sets a tone; at the end of the day, the writer is tired, and ready to sink into palatial comfort which is not always at the expected level.

- Blog entries for restaurants with pests show a great deal of affect and are highly specific in explaining their reaction, which is on a scale ranging from negative concern to outright revulsion. The entries also become quite specific, as they focus on details that would have enticed the pests or vermin: floors, tabletops, grease, food-handling procedures are all cited: the writer wants the reader to understand and feel the same affect and shun the eatery.

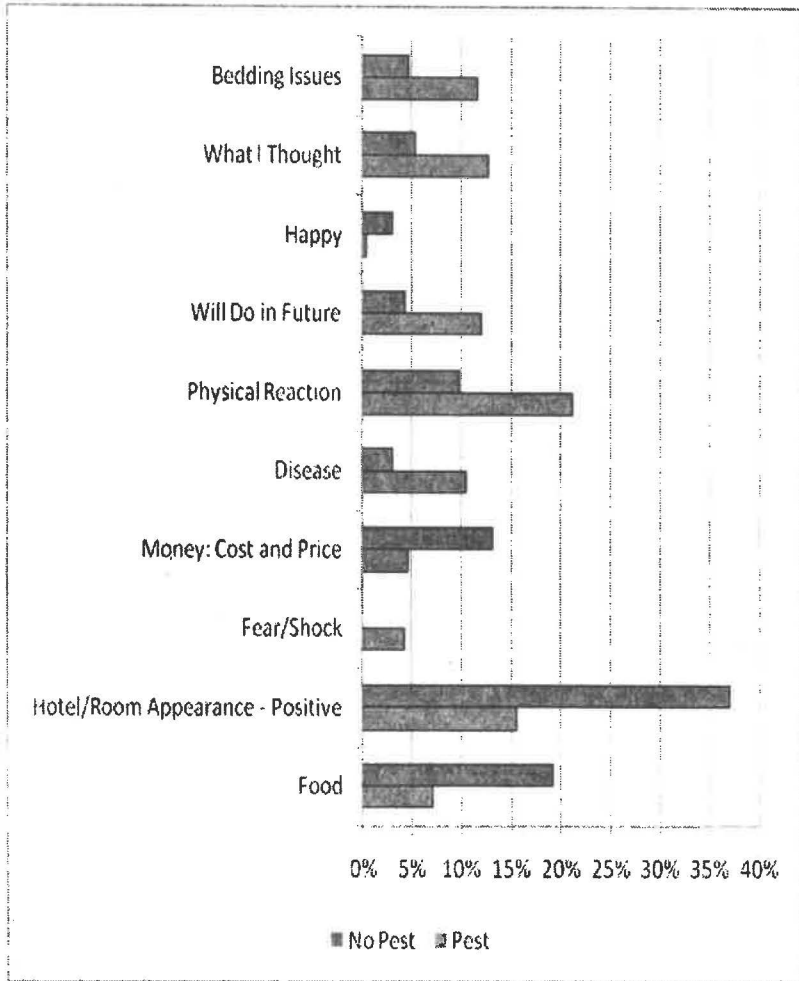
- Blog entries for hotels with pests not only show a great deal of affect, they move to agency more than any of the other kinds of entries, to make promises that the writers will never return and will do their best to warn potential customers, with frequent use of exclamation marks and all-caps letters: the writers splutter their anger and dismay.

While they are strongly repelled by bugs near food, and outraged by protests or denials from management, there is some natural connection between the two, and in general, customers are even more appalled by pests and vermin in sleeping quarters, because that situation is, in their opinion, something that could be taken care of by regular housekeeping maintenance.

## **Hotels**

Figure 1 shows concepts that were mentioned in the reviews in which there is a significant difference between guests who encountered a pest and those that did not have the same experience. The pest encounters lead to a narrative that pinpoints where they encountered the pest and their immediate reaction to it, including their physical reaction which describes bites on arms and legs, illness and the general fear of the pest's returning after the lights are turned off. Guests typically imply they will not return in the future and, in many instances, pointedly state they will not come back and warn others not to consider this hotel. With respect to cost and price, the discussion then focuses on refunds or discounts stemming from the pest incident.

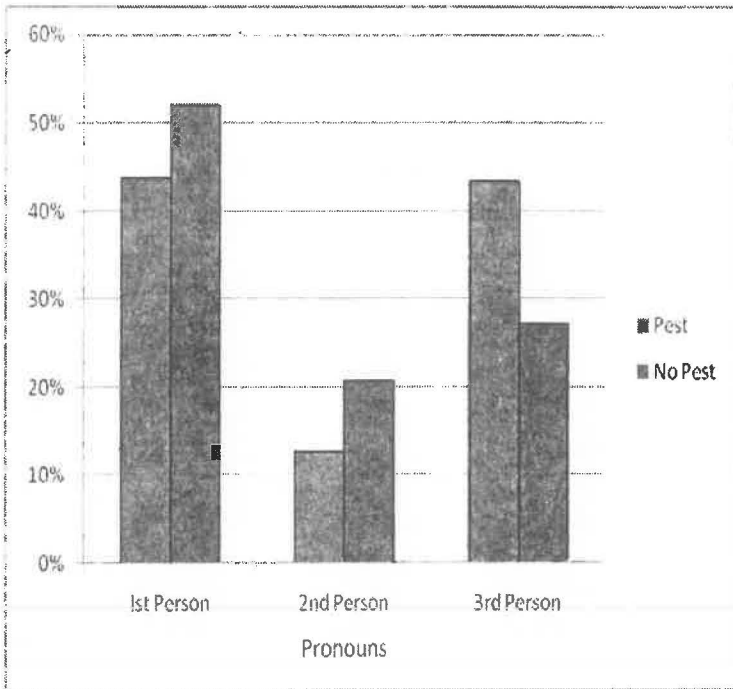
**Figure 1: Hotel Reviewer Themes by Pest Encounter**



Those guests who did not encounter a pest at the same hotel were more likely to have a positive impression of the property and the their room. Additionally, they speak about the restaurant and food service facilities that are part of the hotel. Unlike their counterparts that focuss mainly on the pest incident which colors their whole experience. Price and cost emerge from these reviews with respect to whether the hotel met their expectations for the amount the guest paid.

Figure 2 shows those reviewers who did not encounter a pest exhibited greater opinions in their more frequent use of the 1st and 2nd person pronouns of "I" and "you". Those that did have a pest incident, through the use of 3rd person pronouns, i.e., "they", "it", etc. focussed on what spoiled their experience with more explanation and less opinion.

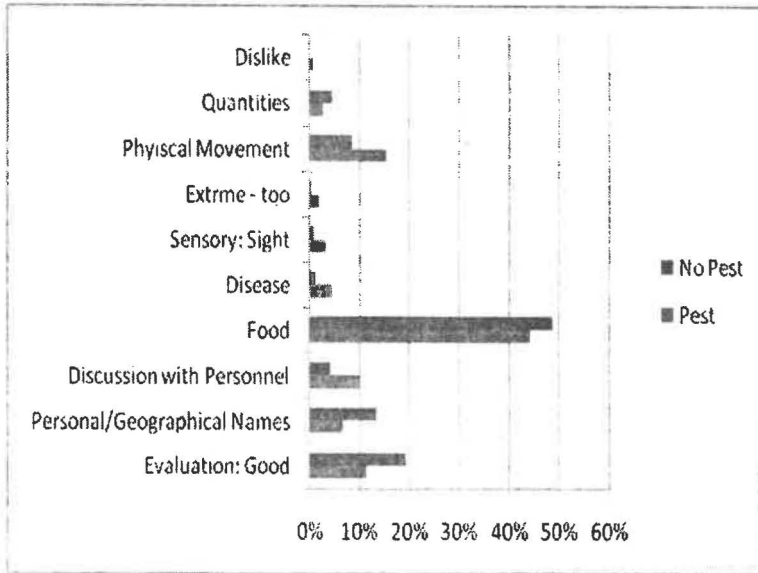
Figure 2 : Hotel Reviewer Opinion Strength by Pest Encounter



## Restaurants

The diners that encountered a pest at a restaurant described its physical movement, i.e., crawl, scurry, etc., in extreme terms and its appearance (Figure 3). Typically the restaurant personnel became involved with the incident. However, in a few cases, the reviewer gave a positive review minimizing the impact of the pest. This situation appears to occur when the insect is not in close proximity to the diner, at high-end establishments and in which otherwise the experience was well beyond expectations.

Figure 3 : Restaurant reviewer themes by pest encounter



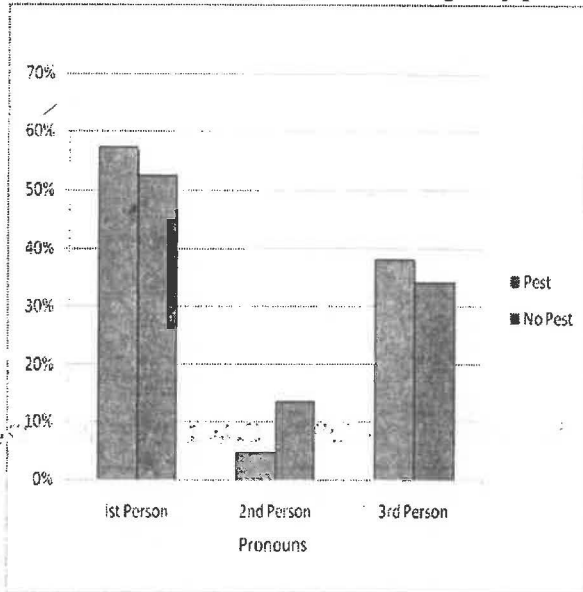
Those customers that did not come across a pest, had more to say about the meal and more likely to provide a positive evaluation of their dining experience (Figure 4). As noted earlier, those diners not describing a pest incident are providing a more engaged opinion about the meal in their use of the 2nd person pronoun "you". Unlike the hotel guests, those confronted by a pest take a greater personalization of the situation as reflected in the 1st person pronoun "I" and fingerpointing with 3rd person "they".

### In Conclusion

The results of this study will hopefully provide valuable insights for both managers and researchers. For hotel and restaurant managers, this research is to our knowledge the first academic research focus on a basic hygiene factor management must perform well in. Offering guests a pest free environment is a basic factor that will not improve guest satisfaction or loyalty. However failing to provide such an environment will have a significant and measurable negative effect that in nearly all cases will lead to customer defection and negative word of mouth. In this dataset, disgust is not too strong a word to characterize guest reactions to a pest in a hotel, resort or restaurant. The best way to describe guest reaction to pests is zero-tolerance.



Figure 4: Restaurant reviewer opinion strength by pest encounter



For researchers, the use consumer evaluations posted on an internet travel blog and the method to analyze these narratives represents our current stage in the evolution of a process of looking for ways to identify the most insightful, efficient and effective means to gain feedback from guests. It is our hope that this description of the stance-shift analysis and its related methodology will invite the interests of other researchers in their investigations of other fundamental aspects of hospitality and tourism research.

Market researchers are taught in their earliest research methods course to first determine if there is existing secondary data before going through the time and expense of collecting primary data. Evaluative narratives from customers on travel blogs are data - albeit qualitative - that are freely available. Mining both good and bad perceptions from hundreds of blog narratives is an overly time-consuming process even for those with the needed tools and expertise in qualitative methods. Our proposed method, aided by software, simplifies the process by which such perceptions - both good and bad, and repeated by several guests - become the basis of a quantitative analysis that can address management concerns in an effective and efficient manner.

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# A Comparative Study of Travel Motivations between Asian and European Tourists to Thailand

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**Abstract :** During the past decade there is an increasing of studies relating to international tourists to Thailand such as tourist behaviors, travel patterns and trip characteristics. However, the literature review indicates that most studies seem to focus on examining international tourists based on one particular country or culture rather than exploring them in terms of comparative studies. This study thus aims to examine and compare travel motivations of international tourists to Thailand between Asian and European tourists. The results indicated that travel motives of Asian and European respondents seemed to be similar in that most of them were more likely to be motivated by 'novelty seeking' when traveling overseas. However, there were some differences regarding the perceptions of destination attractions drawing them to Thailand. Most of Asian respondents were more likely to be attracted by 'a variety of tourist attractions and activities' while the European respondents appeared to view 'cultural and historical attractions' as the key factor to visit Thailand. The results of the study provide practical implications that can be helpful for both policy makers and industry practitioners to develop appropriate marketing strategies and tourism products for the Asian and European travel markets.

**Keywords:** travel motivations, international tourists, Thailand

## Research Background

It is generally argued that the tourism industry is one of the largest and most important sectors for Thailand economy. During the past decade, the tourism industry has significantly expanded and contributed to the overall economic growth of Thailand. Each year millions of international visitors come to Thailand to experience the uniqueness of Thai culture and the beauty of natural resources. According to the statistical reports by the Tourism Authority of Thailand or TAT (2008), the number of international tourists visiting Thailand has been increasing over the past 10 years, from 7.76 millions in 1998 to 14.46 million arrivals in 2007 (TAT 2008). Overseas tourists visiting Thailand come from different parts of the world. Major markets include Asia, Europe, North America and Australia (TAT 2007).

Although the tourism industry in Thailand has been growing during the past decade, the market competition within the region should not be overlooked. In recent years there has been an increasing market competition in the region from major competitors such as Malaysia and Singapore as well as emerging destinations like Vietnam and Cambodia. In particular, major competitors like Malaysia, with 17 million tourist arrivals a year, and Singapore, with 10 million tourist arrivals a year, (World Tourism Organization 2007), they have allocated a lot of budgets for promoting tourism in their countries each year with the aim to be the tourism hub of the region (World Tourism Organization 2007). Their aggressive marketing strategies, for example, can be evidently seen from various media coverage (e.g. TV, newspapers, magazines) aiming to promote Malaysia or Singapore as the leading tourist destination. Since the tourism industry is a major economic driver and a powerful revenue-generating activity in many countries, it is anticipated that the tourism competition is more likely to be more intensified and competitive within the region. With the expected trend and current competitive tourism market, increasing the number of international tourists to Thailand and targeting Thailand as the tourism hub of the region seem to be the challenges for Thailand's tourism industry to compete with key competitors and emerging destinations.

Given the importance of the tourism industry to the Thailand's economy and the intensive market competition, it is essential for Thai tourism marketers to develop effective marketing strategies to attract more international tourists to the country as well as to develop tourism products responding to the needs of the target tourists. In order to be successful in global tourism, according to the literature, tourism marketers should understand travel needs and behaviors of the target markets (Yoon & Uysal 2005; Jang & Wu 2006). One of the useful approaches to understand travel needs and tourists' travel-related behaviors is to examine 'travel motivations' (Crompton 1979; Cha, McCleary & Uysal 1995; Yoon & Uysal 2005). Understanding travel motivations could be regarded as a starting point for the success of the tourism marketing programs (Cha et al. 1995; Jang & Wu 2006). This is because travel motivations help explain tourists' internal needs to travel and what motivates them to a particular-destination, and they are also associated with tourists' destination choice (Dann 1977; Compton 1979). Thus, the knowledge of travel motivations would enable

tourism marketers to better satisfy travelers' needs and wants, and then develop appropriate marketing programs serving the needs of the target markets (Jang & Cai 2001; Andreu, Kozak, Avci, & Ciffer 2006).

One of the common and useful approaches to examine travel motivations is based on the theory of push and pull motivations or often called theory of push and pull factors (Dann 1977; Crompton 1979; Yoon & Uysal 2005). A review of literature indicates that examining travel motivations based on the theory of push and pull motivations has been widely accepted in the tourism literature (Pearce & Caltabiano 1983; Yuan & McDonald 1990). This is because the theory helps explain why people travel and where they go; providing clues for holiday decisions. According to the theory, push factors are related to travel motives (why people travel) while pull factors are associated with tourism attractions (what attracts people to visit a destination). When considered together, push and pull factors are believed to be related to tourists' travel decision making and destination choices. With this regard, the theory of push and pull motivations seems to provide a useful framework to examine different forces motivating a person to take a holiday, and also helps identify the factors attracting that person to choose a particular destination. In order to understand travel needs of international tourists, and to develop effective marketing programs, this study aims to employ the theory of push and pull motivations to investigate travel motivations of international tourists to Thailand. More specifically, the study will compare travel motivations between Asian and European tourists. Asian and European travel markets are the top inbound markets for Thailand's tourism industry (TAT 2008), and both are worth for further investigations to better understand their travel characteristics. The literature, in Thai context, reveals that most studies on tourist-related behaviors are primarily focused on one single market (one country) rather than examining or comparing tourist groups from different countries or regions. Moreover, previous research indicates that tourists from the same region such as Asia or Europe may have some similarities on travel related-behaviors such as travel motivations and/or travel preferences because they may share some commonalities with the core culture either Asian cultures (Asian tourists) or Western cultures (European tourists), and this may be worth for further studies (Lee 2000; Kim & Prideaux 2005). It is hoped that the findings of the study will provide policy markers and destination marketers a better

understanding of travel motivations of international tourists to Thailand and assist them in formulating appropriate tourism policies and strategies to effectively target the international tourist markets.

## **Literature Review**

### ***Concept of the Theory of Push and Pull Motivations***

The theory of push and pull motivations, developed by Dann (1977), is one of the useful theories widely used to examine tourist motivations (Crompton 1979; Pearce & Caltabiano 1983; Yuan & McDonald 1990; Jang, Bai, Hu, & Wu 2004). Dann (1977) made a significant contribution in suggesting two factors motivating people to travel and to go to a particular destination. The two factors are called push and pull factors. The concept of the theory describes that people are pushed to travel by internal motives (called push factors) and pulled to a destination by destination attributes/attractions (called pull factors) when making their travel decisions (Lam & Hsu, 2004). Thus, the concept is classified into two forces/factors (push and pull factors) indicating that people travel because they are pushed and pulled to do so by some forces or factors. Push factors (internal motives) are mainly considered to be associated with socio-psychological motives that predispose people to travel (e.g. novelty/knowledge seeking, rest/relaxation, socialization) while pull factors (destination attributes) are those that attract people to choose a particular destination such as culture, natural attractions, food, local people (Lam & Hsu 2004). These two factors are related to people's decision making for travel and leisure purposes. It is argued that findings from the research examining tourists' motivations by using push and pull factors provide useful insight into the target markets and help tourism marketers in planning effective marketing strategies such as product development and advertisement (Jang & Cai 2002; Jang & Wu 2006)

### ***Studies Related to Push and Pull Motivations***

Several studies (e.g. Yavuz, Uysal, & Baloglu 1998; Zhang & Lam 1999; Jang & Cai 2002; Jang & Wu 2006) have been conducted using the push and pull motivations theory to investigate travel motivations and tourist behaviors. These studies provide useful implications to tourism marketers



in formulating appropriate strategies to attract a target market. Some of them have been reviewed, for example, Zhang and Lam (1999) investigated Mainland Chinese visitors' motivations to visit Hong Kong and disclosed that the most important push factors influencing the Mainland Chinese people to visit Hong Kong were 'knowledge', 'prestige', and 'enhancement of human relationship' motives. The most important pull factors or attractions of Hong Kong were 'hi-tech image', 'expenditure, and 'accessibility'. This study implied that the Mainland Chinese travelers perceived Hong Kong as a unique, modernized, friendly, and convenient place for holidays, and therefore suggested that concerned parties should build Hong Kong's image as a high-tech multinational city in the world to Chinese people via various accessible media. Another study by Jang and Cai (2002) reported that 'knowledge seeking', 'escape', and 'family togetherness' were the most important factors to motivate the British to travel abroad. However, 'cleanliness & safety', 'easy-to-access', and 'economical deal' were considered the most important pull factors attracting them to an overseas destination. The findings from comparing the push and pull factors across seven international destinations (USA, Canada, South America, Caribbean, Africa, Oceania, and Asia) as perceived by the British travelers indicated that each region had its own strengths and weaknesses in terms of its position in the minds of British travelers. The authors suggested that knowledge of people's motivations and its associations with their destination selection is critical to predict their future travel patterns, and the findings could be used for destination product development and formation of marketing strategies.

Kim, Lee and Klenosky (2003) examined the travel motivations of visitors to visit Korean national parks. They found that the most important push factors influencing Korean people to visit the national parks were 'appreciating natural resources and health', followed by 'adventure and building friendship', 'family togetherness and study', and 'escaping from everyday routine' respectively, while the most attractions of the national parks (pull factors) were 'accessibility and transportation', 'information and convenience of facilities', and 'key tourist resources'. The authors suggested that the park administrators should recognize the needs of different groups of visitors (students, families, and older people), and develop the products responding to each group. Another study focusing on domestic tourism conducted by Zhang, Yue and Qu (2004) found that 'prestige' and 'novelty'



were regarded as the top two important push factors of domestic tourists, while 'urban amenity' and 'service attitude and quality' were the most important pull factors of Shanghai appealing to domestic tourists. One important finding from the study indicated that the pull factors like 'service attitude and quality', 'urban amenity', 'expenditure' and 'hi-tech image' may influence the tourists' likelihood to recommend Shanghai to their relatives and friends. In order to promote Shanghai, the authors recommended positioning Shanghai as a city of unique cultural and economic image as well as improve the service quality in Shanghai in order to attract the domestic tourists.

In relation to Thai context, a review of literature indicates a few studies have examined travel motivations of international tourists to Thailand. Among them, Varma (2003), for instance, examined push and pull factors between U.S. and Indian tourists. The study disclosed that U.S. and Indian tourists had differences in relation to push and pull factors. When traveling, the U.S. tourists were more likely to be motivated by exciting experiences while the Indian tourists were primarily stimulated by relaxation motives. The study also revealed that both groups had differences in the perceptions of destination attractiveness (pull factors) such as cultural activities, inexpensive environment, leisure activities, cuisine and safety. Different marketing strategies were suggested for each market. Cheewarunroj (2005) investigated travel motivations of ASEAN tourists to Thailand. The results indicated that some demographic variables, such as age, income, travel experience, had impacts to travel motivations (push and pull factors) among ASEAN tourists. For instance, ASEAN tourists aged 46 or above were more likely to be motivated to travel by relaxation motive than other groups, and tourists with different income level also revealed differences in travel motives and destination attractions. The study reported that first-time visitors perceived knowledge seeking as a major motivation while repeat visitors placed novelty experience as major motivations, and they also had differences in the perceptions of sightseeing variety in Thailand. A recent study by Sangpikul (2008) revealed an interesting result regarding travel motivations of Korean travelers to Thailand. The finding indicated that many Korean travelers were primarily motivated to travel by 'fun & relaxation motives' while the 'attraction variety & costs of travel' were perceived as major

attraction drawing them to Thailand. To attract Korean travelers, marketing themes relating to the relaxation motivations and a variety of tourism programs were suggested.

In sum, the literature has shown that previous studies focusing on the push and pull motivations provide a useful and practical approach for understanding travel needs and wants of people as well as where they desire to go for holiday. The results of these studies imply that the conceptual framework of push and pull factors can be applied to examine travel motivations of different groups of tourists (domestic and international tourists). Although there are a number of travel motivation studies in international context (suggesting the importance of travel motivation studies), few studies have been conducted in relation to Thai context. Given the need for tourism business to satisfy travelers' needs and expectations in a competitive global tourism, more research in this area (travel motivations of international tourists) is needed, particularly the studies comparing travel motivations of different target markets visiting a particular destination (e.g. Thailand).

## **Methodologies**

The samples in this study were Asian and European tourists aged 20 years older and over. A pilot test was conducted with 50 respondents to obtain feedback and comments on the clarity and appropriateness of the research questions about push and pull travel motivations. Based on the pilot test, some modifications were made to ensure respondents could better understand the questions and choose appropriate answers. This study used a convenience sampling method, and data were collected at major tourist attractions in Bangkok through a closed-ended, self-administered questionnaire. The target samples were approached, and asked for voluntary participation. Once they agreed, they received small souvenirs for their participation. To ensure a high return and usable rate, questionnaires were collected onsite and checked for completeness. Four hundred questionnaires were collected and used for data analysis. Among them, there were 220 Europeans from 9 countries, i.e. UK (38), German (35), France (33), Switzerland (28), Italy (25), Sweden (23), Denmark (16), Spain (12) and Netherlands (10), and 180 Asians from 7 countries, i.e. Malaysia (40),

Singapore (36), Hong Kong (29), South Korea (22), China (19), Japan (16), India (10) and Taiwan (8).

The questionnaire was developed from a review of previous studies focusing on push and pull motivations (Cha et al., 1995; Kim & Lee, 2000; Klenosky, 2002; Jang & Cai, 2002; Jang & Wu, 2006). The items for each set of push and pull factors that were used to measure travel motivations for visiting Thailand were selected from motivation items identified in previous studies as well as suggestions from a group of experts (tourism professors). Based on the review, 13 motivational items were generated for each set of push and pull factors and converted into a closed questionnaire style using five-point Likert scales, ranging from 1 (strongly disagree) to 5 (strongly agree). The questionnaire was divided into two sections: general information and travel motivations. The sample question for push factors was, for instance, "Do you think you travel abroad because you want to see something new and exciting". For pull factor, the respondents were asked "Do you think Thai culture is an important factor for you to come to Thailand".

Data were analyzed by using the Statistical Package for the Social Sciences (SPSS) program, and they were performed through three steps. Firstly, descriptive statistics (i.e. mean, frequency, percentage) were used to describe general information of the respondents. Secondly, descriptive statistics (i.e. mean and standard deviation) were also employed to rank the push and pull factors in terms of individual item to determine which items served as major push and pull factors. Then, each push and pull factor was ranked in terms of the importance from the most important factor (highest mean) to the least important one (lowest mean). Thirdly, the push and pull factors were then grouped by using factor analysis to find the push and pull factor dimensions (or similar factor groupings) that may emerge among the respondents. Factor analysis was chosen because it is a statistical approach used to analyze interrelationships among a large number of variables and to explain the variables in terms of their common underlying dimensions or similar groupings (Hair, Anderson, Tatham, & Black 2006). It should be noted that a 0.05 level of significance was employed in all of the statistical assessments in this study.

## Findings

### Respondent's Profile

Table 1: Profile of research respondents

Characteristics	Descriptions	Number (n=400)	Percent (100%)
<b>Gender</b>	Male	232	58.0%
	Female	168	42.0%
<b>Age</b>	20 - 30 years	128	32.0%
	31 - 45 years	160	40.0%
	46 - 55 years	72	18.0%
	56 years or older	40	10.0%
<b>Marital status</b>	Single	216	54.0%
	Married	152	38.0%
	Divorced/Separated/Widowed	32	8.0%
<b>Education</b>	High school or lower	72	18.0%
	Bachelor degree	236	59.0%
	Master degree or higher	92	23.0%
<b>Occupation</b>	Company employee	140	35.0%
	Government officer	72	18.0%
	Student	60	15.0%
	Business owner	36	9.0%
	Independent/self-employed	32	8.0%
	Unemployment	24	6.0%
	Housewife	12	3.0%
	Retired	20	5.0%
Others	4	1.0%	
<b>Monthly Income</b>	US\$ 1,000 or lower	48	12.0%
	US\$ 1,001 – 2,500	104	29.0%
	US\$ 2,501 – 3,500	132	33.0%
	US\$ 3,501 – or higher	116	26.0%
<b>Regional base</b>	Asia	180	45.0%
	Europe	220	55.0%

From table 1, the samples were 58% males and 42% were females. Most of them were in the age group of 31 - 45 years (40%) and 20 - 30 years old (32%). More than half were singles (54%), and most of them (59%) had education at the college level (bachelor degree). The respondents came from different occupations, for example, 35% were company employees, 18% were government officers, 15% were students, and 9% were business owner. Approximately 29% of the respondents had monthly

income in the range of US\$ 1,000 - 2,500, 33% had income in the range of US\$ 2,501 - 3,500, and 26% earned approximately US\$ 3,501 or higher. Among 400 respondents, there were 180 Asian respondents and 220 European respondents.

### **Comparison of Pull Factors (Individual Pull Factor)**

Table 2: Comparison of push factors between Asian and European Tourists

Push motivational items	Asians	Europeans	t-value	Sig.
1. I want to travel to a country I have not visited before.	3.53	4.19	4.19	0.00*
2. I want to experience cultures that are different from mine.	3.84	4.29	3.65	0.00*
3. I want to learn new things from a foreign country.	3.79	4.15	2.98	0.03*
4. I want to see something new and exciting.	3.81	4.27	3.82	0.00*
5. I want to seek fun or adventure.	3.75	3.98	1.96	0.53
6. I want to fulfill my dream of visiting a new country.	3.72	3.94	1.95	0.51
7. I want to spend more time with my couple or family members while traveling	3.67	3.39	-2.74	0.00*
8. I want to see and meet different groups of people.	3.53	3.78	3.25	0.75
9. I want to escape from busy job or stressful work.	3.68	3.84	1.07	0.28
10. I want to escape from routine or ordinary environment.	3.86	3.81	0.34	0.74
11. I want to rest and relax.	3.89	3.99	0.62	0.53
12. I want to improve my health and well-being.	3.71	3.49	-2.77	0.00*
13. I can talk to everybody about my trips when I get home.	3.80	3.55	-2.60	0.01*
Overall mean score	3.81	4.02		

\*  $p < 0.05$

Table 2 shows the mean ranking of push factor (by individual factor). There were some significant differences of travel motives (push factors) between Asian and European tourists. The results indicated that European tourists were more likely to rate motives relating to novelty or excitement experiences such item 1, 2, 3, and 4 higher than its counterparts (Asian tourists). These push factor were scored above 4.0 as rated by European tourists while the Asian tourists rated them less than 4.0. This suggests that European tourists tended to be motivated by novelty motives. Other differences were found in item 7 (spending time with family members), item 12 (improving health), and item 13 (talking about the trip). Asian tourists seemed to rate these items higher than European tourists. Based on the

results, this may provide important implications to understand the differences of travel motives (reasons/desires to travel) between Asian and European tourists.

### **Comparison of Pull Factors (Individual Pull Factor)**

**Table 3: Comparison of pull factors between Asian and European Tourists**

<b>Pull motivational items</b>	<b>Asians</b>	<b>Europeans</b>	<b>T-value</b>	<b>Sig.</b>
1. Seaside/beaches	3.75	4.25	1.94	0.00*
2. Natural attractions	3.83	4.11	3.50	0.45
3. Thai culture	3.71	4.37	2.52	0.00*
4. Thai food	3.83	3.90	0.53	0.59
5. Cultural/historical attractions	3.76	4.24	1.37	0.00*
6. A variety of tourist attractions	3.92	3.74	-0.30	0.76
7. Low cost of living	3.81	3.82	-0.49	0.61
8. Travel costs to Thailand	3.84	3.69	-1.84	0.67
9. Travel information	3.66	3.55	-0.78	0.41
10. A variety of shopping places	3.88	3.80	-1.97	0.04*
11. Leisure activities and entertainment	3.80	3.47	-2.64	0.00*
12. Safety and security	3.73	3.82	0.66	0.50
13. Hygiene and cleanliness	3.65	3.46	-1.40	0.16
Overall mean score	3.79	3.98		

Table 3 presents the mean ranking of pull factors (individual items). Like the push factors, there were some significant differences found in the perceptions of pull factors (destination attractions) between Asian and European tourists. In generally, it seems that European tourists (M=3.98) were more likely to perceive Thailand as more attractive destination than Asian tourists (M=3.79) due to the higher overall mean score. When considered in details, it was found that European tourists rated higher score (significant differences) on the attractions of 'seasides/beaches', 'Thai culture', and 'cultural/historical attractions' than Asian tourists. Meanwhile, Asian tourists perceived and rated 'a variety of shopping places' and 'leisure activities and entertainment' as more important factors than European tourists.

## Factor Analysis of Push Factors

Table 4: Factor analysis of push factors (Asian tourists)

Push factor dimensions ( <i>reliability alpha</i> )	Factor loading	Eigen value	Variance explained	Factor mean
<b>Factor 1: Novelty seeking</b> ( <i>alpha</i> = 0.82)		7.12	34.89%	3.87*
I want to see something new and exciting	0.72			
I want to learn new things from a foreign country.	0.71			
I want to experience culture that is different from mine.	0.68			
I want to seek fun and adventure.	0.65			
I want to fulfill my dream of visiting a new country.	0.59			
I want to travel to a country I have not visited before.	0.54			
I want to rest and relax.	0.54			
I want to improve my health and well-being.	0.50			
<b>Factor 2: Escape</b> ( <i>alpha</i> = 0.79)		2.34	10.28%	3.72
I want to escape from busy job or stressful work.	0.67			
I want to escape from routine or ordinary environment.	0.65			
<b>Factor 3: Socialization</b> ( <i>alpha</i> = 0.69)		1.78	8.57%	3.45
I want to spend time with my family members while traveling.	0.65			
I can talk to everybody about my trips when I get home.	0.62			
I want to see and meet different groups of people.	0.59			
<b>Total variance explained</b>			<b>60.35%</b>	

\* the most important factor

As shown in table 4, three push factor dimensions were derived from the factor analysis, and they were categorized into 3 groups: (1) 'novelty seeking', (2) 'escape', and (3) 'socialization'. Each factor dimension was named based on the common characteristics of the variables it included. The three push factor dimensions explained 60.35% of the total variance. Among them, 'novelty seeking' (factor mean=3.87) and 'escape' (factor mean=3.72) emerged as the major push factors motivating the respondents to travel abroad.

According to table 5, similarly to Asian tourists, three push factor dimensions were derived from the factor analysis, and they were categorized into 3 groups: (1) 'novelty seeking', (2) 'escape & relaxation', and (3) 'socialization'. Each factor dimension was named based on the common

characteristics of the variables it included. The three push factor dimensions explained 61.28% of the total variance. Among them, 'novelty seeking' (factor mean=4.10) and 'escape & relaxation' (factor mean=3.89) emerged as the major push factors motivating the respondents to travel abroad. It should be noted that, in general, factor analysis of push factors between Asians and Europeans were relatively similar.

Table 5: Factor analysis of push factors (European tourists)

Push factor dimensions (reliability alpha)	Factor loading	Eigen value	Variance explained	Factor mean
<b>Factor 1: Novelty seeking (alpha = 0.83)</b>		7.45	38.78%	4.10*
I want to see something new and exciting	0.85			
I want to experience culture that is different from mine.	0.78			
I want to learn new things from a foreign country.	0.76			
I want to travel to a country I have not visited before.	0.75			
I want to seek fun and adventure.	0.71			
I want to fulfill my dream of visiting a new country.	0.70			
<b>Factor 2: Escape and relaxation (alpha = 0.79)</b>		2.47	12.38%	3.89
I want to escape from routine or ordinary environment.	0.66			
I want to escape from busy job or stressful work.	0.64			
I want to rest and relax.	0.61			
I want to improve my health and well-being.	0.60			
<b>Factor 3: Socialization (alpha = 0.76)</b>		1.55	8.55%	3.55
I want to see and meet different groups of people.	0.72			
I can talk to everybody about my trips when I get home.	0.70			
I want to spend time with my family members while traveling	0.65			
<b>Total variance explained</b>			<b>61.28%</b>	

\* the most important factor

With regard to pull factors (table 6), factor analysis with varimax rotation was performed to group the pull factors. According to table 6, three pull factor dimensions were derived from the factor analysis, and they were named: (1) 'a variety of tourist attractions & activities', (2) 'travel costs', and (3) 'safety & cleanliness'. These three factor dimensions explained 60.15% of the total variance. Based on the result, 'a variety of tourist attractions & activities' (mean factor=3.83) and 'travel costs' (mean



factor=3.58) were regarded as the major pull factors attracting the respondents to Thailand.

**Factor Analysis of Pull Factors**

**Table 6: Factor analysis of pull factors (Asian tourists)**

<b>Pull factor dimensions (Cronbach's alpha)</b>	<b>Factor loading</b>	<b>Eigen value</b>	<b>Variance explained</b>	<b>Factor Mean</b>
<b>Factor 1: A variety of tourist attractions &amp; activities (alpha = 0.85)</b>		7.47	35.81%	3.83*
A variety of tourist attractions	0.88			
Cultural/historical attractions	0.85			
Thai culture	0.83			
Thai food	0.80			
A variety of shopping place	0.78			
Natural attractions	0.70			
Beach/seaside	0.69			
A variety of leisure activities and entertainment	0.66			
Travel information	0.62			
<b>Factor 2: Travel costs (alpha = 0.80)</b>		2.30	10.88%	3.58
Low cost of living	0.78			
Travel costs to Thailand	0.75			
<b>Factor 3: Safety and cleanliness (alpha = 0.75)</b>		1.45	8.23%	3.24
Hygiene and cleanliness	0.68			
Safety and security	0.61			
<b>Total variance explained</b>			60.15%	

\* the most important factor

For European tourists, a similar factor analysis with varimax rotation was performed to group the pull factors. As shown in table 7, two pull factor dimensions were derived from the factor analysis, and they were named: (1) 'a variety of tourist attractions & activities' and (2) 'cultural and historical attractions'. These two factor dimensions explained 59.25% of the total variance. With relatively high score of factor mean, 'cultural and historical attractions' (factor mean=4.15) and 'a variety of tourist attractions & activities' (factor mean=3.89) was considered as the key pull factors attracting the respondents to Thailand.

Table 7: Factor analysis of pull factors (European tourists)

Pull factor dimensions (Cronbach's alpha)	Factor loading	Eigen value	Variance explained	Factor Mean
<b>Factor 1: A variety of tourist attractions &amp; activities (alpha = 0.82)</b>		7.05	35.81%	3.89
A variety of tourist attractions	0.89			
Beach/seaside	0.81			
Natural attractions	0.79			
A variety of shopping place	0.75			
Low cost of living	0.73			
A variety of leisure activities and entertainment	0.71			
Travel cost to Thailand	0.70			
Travel information	0.68			
Hygiene and cleanliness	0.54			
Safety and security	0.51			
<b>Factor 2: Cultural and historical attractions (alpha = 0.87)</b>		1.58	10.88%	4.15*
Thai culture	0.78			
Cultural and historical places	0.75			
Thai food	0.70			
Total variance explained			59.25%	

\* the most important factor

## Discussion of Travel Motivations

According to push factor analysis (table 4), it was found that 'novelty seeking' was regarded as the most important push factor stimulating Asian respondents to travel abroad. Likewise, the study (table 5) revealed similar results indicating that 'novelty seeking' was regarded as the most important push factors motivating European respondents to travel overseas. In overall, the results of push factors analysis (motives to travel) of the two markets were quite similar, though there are minor or slight differences in other motives (e.g. escape and socialization motives). Generally, the current findings are similar to previous studies revealing that novelty seeking is the major motive for many tourist groups to travel to overseas destinations. For example, Lee (2000) revealed that novelty experience was the major push factor

among international tourists visiting South Korea. Cha et al. (1995) and Jang & Wu (2006) also found that novelty and knowledge seeking was the key push factor for Japanese and Taiwanese to travel abroad. This suggests that, in international tourism, novelty seeking or the motive to experience something new, exciting or different from people's usual environment seems to be the major motive stimulating people to travel to different parts of the world in order to seek something that they can't obtain in their usual environment. Thus, it is not surprising with the current findings revealing that both Asian and European tourists were motivated by novelty motive to travel to a particular destination if they wish to experience something that is different from their own cultures or surroundings.

With regard to pull factor analysis (table 6 and 7), it seemed that the results of pull factors between Asian and European tourists were different. In case of Asian tourists, 'a variety of tourist attractions and activities' was regarded as the most important factor attracting them to Thailand while European tourists perceived 'cultural & historical attractions' as the most important factor drawing them to Thailand. Basically, it should be noted the result of pull factors (destination attractions) could be viewed differently by country to country or market to market (i.e. Asians and Europeans) depending on the image and perception of travelers toward a particular destination (Kozak 2002). In the current study, it could be possible that Asian tourists, with similar cultures and distance closure to Thailand, they may perceive Thai culture not much different from their cultures or Asian subcultures. Instead, they may be attracted to Thailand due to a variety of tourism products and services being offered or marketed to the mass market by Thai tourism businesses/operators. According to the Tourism Authority of Thailand's reports (TAT 2006; TAT 2009), Thailand is marketing a variety of tourism products to the Asian markets including cultural tourism, health tourism, natural-based tourism, special interest tourism. Furthermore, there are several studies indicating that many Asian tourists come to Thailand because of a variety of tourist attractions such as culture, historical sites, beach tourism, shopping, night life or city entertainment (Nuchailak 1998; Tanapanich 1999; Soda 2001). With the country's image of tourism product varieties among Asian markets and the above arguments, it could be possible that many Asian respondents may perceive Thailand as one of the destinations with

the variety of tourism attractions, and this could be the major attraction drawing them to Thailand.

In the case of European tourists, it seemed that they were more likely to appreciate Thai cultural and historical attractions as the major pull factors drawing them to Thailand. The current finding is somewhat similar to other studies examining travel motivations of European tourists (e.g. Yavuz et al. 1998; You & O'Leary 2000). Those studies indicated that cultural and/or historical attractions are common destination attractions drawing European tourists to visit a particular destination. For example, Yavuz et al. (1998) disclosed that European travelers perceived cultural attractions of Cyprus as more important factor for them than any attractions. Furthermore, You and O'Leary (2000) argued that culture and heritage attractions have strong appeals among many international tourists when visiting overseas destinations. This type of attraction could be ranked among the top destination attributes attracting European travelers to overseas destinations. In case of European tourists to Thailand, it could be possible that European respondents may perceive Thailand differently from Asian respondents. European respondents may appreciate Thailand as the distinct country in Asia with old history and unique culture (e.g. Thainess). There are several studies reporting that many European tourists perceived Thai cultural/historical attractions as the most important factor for visiting Thailand such as Prasertwong (2001) and Zhang, Fang, and Sirassamee (2004). Another argument could be that Thailand is one of the few countries in the world that has never been colonized by any western power. This phenomenon affects the nature of the land, culture, history, and Thai people to this day. Previous research has shown that many international tourists come to Thailand because of the attractiveness of Thai unique culture and historical backgrounds (Prasertwong 2001; Zhang et al. 2004). Moreover, Prasertwong (2001) argued that Thailand is usually perceived to be a destination that is rich in historical and cultural attractions; making it different/distinct from other Asian countries and attractive to many international tourists. In addition to previous studies' support, it seems that the influences of marketing campaigns by the Tourism Authority of Thailand also have the impacts on Thailand's cultural image among European tourists. The campaigns in European markets can be found and supported by various types of activities

using Thai cultural, historical and/or heritage themes as the key marketing tools attracting European tourists to Thailand (TAT 2007; TAT 2009). These marketing tools have been widely recognized and succeeded in the European markets (TAT 2007). Based on the above arguments, it is not surprising why many international tourists including European tourists visit Thailand because of the Thai cultural/historical attractions.

## **Conclusion and Recommendations**

Using the theory of push and pull factors as a conceptual framework, this study has the objectives to examine and compare travel motivations of international tourists to Thailand based on geographical regions (i.e. between Asian and European tourists). As noted, the study was done on the assumption and previous studies' support in that tourists from the same region (Asia or Europe) may share some similarities or commonalities on travel related-behaviors such as travel motivations and travel preferences.

According to the current study, the results revealed that travel motives (push factors) and the perception of Thailand's destination attractions (pull factors) differed between Asian and European tourists. For Asian tourists, the study identified three push and three pull factor dimensions associated with Asian tourists' travel motivations. The three push factors were named as (1) 'novelty seeking', (2) 'escape', and (3) 'socialization', while the three pull factors included: (1) 'a variety of tourists' attractions & activities', (2) 'travel costs', and (3) 'safety & cleanliness'. Among them, 'novelty seeking' and 'a variety of tourist attractions & activities' were viewed as the most important push and pull factors for Asian tourists. With regard to European tourists, the study identified three push and two pull factor dimensions related to European tourists' travel motivations. The three push factors were named as (1) 'novelty seeking', (2) 'escape & relaxation', and (3) 'socialization', while the two pull factors included: (1) 'a variety of tourist attractions & activities' and (2) 'cultural & historical attractions'. Among them, 'novelty seeking' and 'cultural & historical attractions' were regarded as the most important push and pull factors for European tourists. It is hoped that the current findings would add to the tourism literature in travel motivations subject, particularly in Thai context, by providing a better understanding of travel motivations differences of international tourists to Thailand.

Since this study examined and compared travel motivations between Asian and European tourists, the recommendations will be proposed based on the results of each group. It is hoped that the recommendations would be useful for destination tourism marketers and travel business operators to develop appropriate marketing strategies, policies and products corresponding to the needs of the target markets.

### ***Asian Tourists***

According to the literature, knowing the importance of push and pull factors perceived by the tourists can help destination marketers develop the marketing programs to meet the desired needs of the target market (Jang & Wu 2006). This implication could be applied to the current study to develop the products and services to attract the international tourists to Thailand. Based on the current findings, 'novelty seeking' was found to be the most important motive stimulating Asian respondents to travel abroad, and 'a variety of tourist attractions & activities' was regarded as the major destination attraction drawing them to Thailand. Based on these results, tourism marketers should realize the importance of push factor 'novelty seeking' which are related to the needs to see something new, exciting or different from travelers' usual environment. These motives are regarded as driving forces for Asian tourists to travel abroad. At the same time, destination marketers should realize that 'a variety of tourist attractions & activities' is perceived as the major destination attraction (pull factor) drawing them to Thailand. According to You, O'Leary, Morrison, and Hong (2000), tourism marketers need to tie the motivational drives (motives) with the activities that the destination can offer (attractions) and then package them to better satisfy the targets' needs. This suggestion could be applied to the case of Asian tourists who are mainly motivated to travel abroad by 'novelty seeking' and attracted to Thailand by 'a variety of tourist attraction & activities'. Thus, it is important for destination marketers to develop marketing programs (e.g. advertising, communications) by stimulating the needs of the targets (novelty seeking) and satisfy those needs with Thailand's destination attractions (a variety of tourist attractions & activities). This can be done by designing appropriate marketing programs or advertisements (e.g. TV ads, travel guides/books, brochures) by matching what they need and what we can offer. One of the possible ways is to create a marketing or tourism theme specially targeted for the Asian markets, for example, "Explore

Thailand: Discover and Experience the Land of Exotic and Variety". The theme might help stimulate the needs of novelty seeking (something new, different or exciting), at the same time, attract or persuade them to discover those things in Thailand by offering a unique and a variety of tourism products reflecting the theme. The products may include cultural tourism, natural tourism (e.g. beaches and islands), spa/health tourism, and shopping/entertainment programs. It should be noted that, this is the suggested idea for destination marketers to develop further/future marketing plans and strategies based on their decisions.

### ***European Tourists***

The recommendations for European tourists would apply the same concept of those discussed in Asian tourists (matching the results of push and pull factors). However, the strategies need to be modified to cater to the needs of European tourists. The findings derived from European respondents indicated that 'novelty seeking' and 'cultural & historical attractions' were regarded as the major push and pull factors. Thus, destination marketers need to tie the motives (push factor) with the activities that the destination can offer (pull factor) and then package them to better satisfy the targets' needs. Like the Asian tourists, destination marketers may develop marketing programs (e.g. advertising, communications) by stimulating the needs of novelty seeking and satisfy those needs with Thailand's cultural and historical attractions. This can be done by designing appropriate marketing programs or advertisements (e.g. TV ads, travel guides/books, brochures). Like the Asian market, one of the possible marketing or tourism themes developed for the European market could be, for example, "Explore Thailand: Discover and Experience the Treasure of Southeast Asia" or "Discover the Kingdom of Thailand: the Land of Exotic and Unique Culture". The themes might help stimulate the needs of novelty seeking (something new, different or exciting), at the same time, attract or persuade them to discover and experience the cultural heritage of Thailand such as Thai culture and local ways of life in different sub-regions, historical places, ancient capitals or cities, traditional Thai food or local food, and Thai traditional performances. It is hoped that the suggestions here could be helpful for the industry practitioners to get some ideas of how to develop or design the marketing plans/strategies for the European markets.

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# Infusion of the Internet and Indigenous Tourism: An Australian Framework

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**Abstract :** Innovations in the fields of ICT, Transport, and HRM have transformed the structure of the global tourism and travel industry. The Internet has enabled tourism and travel companies to tap into new domestic and international markets while availing regions in developing countries the opportunities to publicize their unique tourism products and services. The premise of this article refers to the dual nature of IS. Firstly, IT results in unification of practice as standards are integrated when users employ the technology. After the initial unification of practice as standards are integrated in the operations, technological institutionalism posits that managers can make strategic choices in the scale/scope of adoption of global tourism practices. The economic possibilities of the Internet and IT are proposed to be the catalysts of strategic differentiation in tourism planning which improves managers' ability to develop strategic niches. Indigenous tourism operators and entities engaged in developing tourism can introduce, publicize and promote their unique characteristics via Internet. Increased exposure enables development of a truly indigenous experience. Initially Internet-assisted entry into global tourism is seen as the process of mimicking tourism practices established by developed regions. Later the adopters' practices evolve to include indigenous strategies to develop region-specific tourism initiatives.

**Key words:** Institutionalism, Indigenous Tourism, Internet, Strategic choice, Australia.

## Introduction

Information Technology (IT) and the Internet are developments that have created access to new local and international markets. Although the use of the Internet in developing countries has affected the way travel agents perform their functions, the core functions have remained unchanged.

Instead of a change in process the Internet has been used mainly as a tool to communicate more effectively and to provide service information to the end customer.

The Internet has, however, allowed National Tourism Organisations (NTO) and the private sector in developing countries to adopt "best practices" of international travel companies thereby resulting in unification of global tourism practices. As the global model of tourism matures and tourism providers become more skilled at managing and developing their own tourism resources, then differentiation occurs. Thus it is proposed that a major event like the advent of the Internet may appear to have had a homogenizing affect on industry practices but it may in fact act as a catalyst for the development of indigenous tourism models highlighting the unique characteristics of the region and the cluster of tribes that inhabit the said regions. Rather than changing core functions the Internet may unify "best practice" tourism models, whilst at the same time permit differentiation as, for example, in regional and/or tribal-specific tourism. This differentiation may also create a barrier to protect the competition for indigenous tourism companies from mainstream tourism companies.

Theoretically speaking, the uptake and infusion of innovation can be explained by Rogers' Diffusion of Innovation Theory (1983), where the process of change is seen as the outcome of a multi-level and sequential communicative practice across an industry. The adopters basically mimic the "best practices" from the first movers and this in turn results in unification of practice across an industry. However, as will be explained later in the paper, the process of infusion of innovation, at least as far as the case of local and indigenous tourism companies are concerned, should be seen as a process of selective infusion after an initial stage of unification. The new technology allows companies to select from a variety of innovative options. This approach is significant for indigenous tourism companies where differentiation is based on the uniqueness of tribal and regional attributes as opposed to mainstream tourism products. The paper explores both classical diffusion of innovation (DOI) and institutionalist approaches. A framework is developed that outlines the dynamics of infusion and form selection in the tourism industry as companies go through a multiple of change levels. These levels create a unification of practice which later evolved to encompass differentiation and niche specific market growth.

## **Literature Review**

Rogers (1983) defines DOI as the process by which an innovation is communicated through certain channels over time among the members of a social system. Rogers (1983) also states that patterns of adoption of an innovation are influenced by characteristics specific to that innovation and the adopter. Adoption is also influenced by opinion leaders. The Individual Innovativeness Theory (Buhalis 1998; Burgess et al. 2001; Rogers 1983) states there are three conditions for an innovation to be adopted. These are:

1. A critical mass of adopters is needed to convince the "mainstream" to adopt the new change;
2. A regular and frequent use of the innovation is necessary to ensure success of the diffusion effort; and
3. The communication technologies need to be able to be accessed.

These conditions are essential because they can be applied in different ways and for different purposes and are part of a dynamic process that involves change, modification and reinvention by individual adopters,

In the case of the indigenous tourism, the trajectory of growth and uptake of innovation is seen as a combination of various steps. These steps start from a generalised unification of practice as outlined by traditional DOI model (Buhalis 1998; Burgess et al. 2001, Rogers 1983). At the preliminary stages of the diffusionary process, companies, in order to be allowed to exist in the industry, are forced to adhere to a set of rules and regulations imposed by the governing bodies of the industry which in this case are the various tourism and travel bodies in Australia (e.g. International Air Transport Association (IATA) and Australian Federation of Travel Agents Limited (AFTA)). Upon adherence to the prescribed rules and regulations, companies are allowed to differentiate themselves when it comes to sales and promotion of their product and services. The choice and extent of differentiation is directly proportional to the level of financial resources available to the indigenous tourism companies and the benchmark, or the accepted norm that acts as an institutional base for the travel companies. As far as the financial resources are concerned, this means the greater the amount of available resources, the higher the chance of

proliferation of indigenous tourism companies. In Australia, various Commonwealth and State authorities support initiatives for Internet and communication technology from indigenous communities for community-based tourism ventures based on the unique tribal and regional characteristics.

Once the institutional benchmark has been selected all tourism regional companies enter into a web of strongly complementary technical relationships thus reinforcing the uptake of the benchmark. This reinforcement of the benchmark gives rise to networks where issues such as compatibility and standardisation become relevant. Such a process is continuous and infuses through the mimicking of the practices of others. This is in line with the institutional approach of Havemann (1993a) where diffusion of global tourism practices occurs at two levels; firstly at the national economic level where the emphasis is on the macro aspect of industry change and secondly at the company and independent entity or micro level where tourism services are offered through the network to the consumer. From this perspective, organizational innovation is strongly influenced by the environment in which the organization is set. In the environment not only are competitive forces and efficiency-based forces at work, socially constructed belief and rule systems exercise control over companies and influence the way they are structured and how they carry out their work (Scott 1990). National economic concepts and global values influence regional business practices. These practices may later evolve into more localized processes utilizing localized values and norms which encourage differentiation amongst regional indigenous tourist companies.

## **Global Tourism Potential**

Trade in tourism services and tourism activities have the potential to become engines for growth and economic development. Tourism can also be a driving force to combat poverty. But it is also a highly vulnerable economic activity affected by serious risk factors. These include international politics, health issues and climatic events. Apart from these global processes a major challenge for developing tourism initiatives is the growing control by a few global tourism operators of travel distribution networks throughout the world. These include organized travel, international bookings, and the marketing and sales of tourism and related activities. This concentration of

power reduces the benefits that developing regions can reap from the liberalization and expansion in world tourism (OECD 2002a, 2002b).

The Internet, as far as developing regions is concerned, has increasingly been incorporated into cultural, educational and outdoor tourism "good practices" and processes. Therefore the tourism sector is offered an important opportunity to better exploit the Internet in building customer relationships by gathering information from customers and potential clients to create customer profiles to identify customer interests. This type of assistance would help to increase niche identification, development and maintenance.

## **Indigenous Tourism in Australia**

Indigenous performers and graphic images representing or suggesting Aboriginal culture were central aspects of the opening and closing ceremonies of the Olympics and Para-Olympics in 2000. These and other examples like these have encouraged the Commonwealth Government of Australia to develop an indigenous tourism scheme. The aim of the scheme is to enable:

- a) A choice for indigenous people to be involved in the tourism industry thus promoting community involvement and ownership, and
- b) The development of community ownership of the indigenous tourism products by the indigenous peoples with appropriate support from the mainstream tourism industry (ATSIC 2003).

The indigenous population of Australia is made up of two groups. These are Aboriginal Australians and Torres Strait Islanders. Within each main group there are a number of tribes and communities, each distinct and offering unique experiences. These differences among groups of indigenous Australians are a promising opportunity for developing specific market niches. To enable this opportunity the Internet will be used not only to promote indigenous tourism but also to educate, train and develop the international profile of indigenous tourism in Australia. To date, promotion has typically relied on indigenous themes which portray a single indigenous culture - one where boomerangs, didgeridoos, dot or X-ray style painting, and stereotyped

imagery has predominated. Indigenous cultural industries, particularly arts and crafts, are popular with tourists. The value of these arts and crafts sales exceeds the current value of indigenous cultural tourism, and represents the main form of contact most tourists have with indigenous cultures at present. Thus, indigenous arts and crafts represent a considerable economic strength that can be built on to benefit both tourism and cultural industries (ATSIC 2003).

A fundamental undertaking of indigenous tourism authorities in Australia is the provision of basic training and skills necessary to develop a skills base in aboriginal areas. The indigenous peoples can in turn form contractual relationships with mainstream tourism companies to promote their unique tourism experience. Indigenous entrepreneurs are encouraged and supported to attend a Technical and Future Education (TAFE) Aboriginal Tour Guide Program. One aim of the program is to encourage indigenous Australians to form businesses and cooperatives specializing in indigenous tourism. The course also familiarizes the participants with basic tourism management skills. As a starting point, to increase national and international awareness, some cultural tours have been developed. These tours include the Upper Hunter Valley, based on four main sites. For example, Gringai Cultural Tours offer full and half day tours of Aboriginal sites which provide a distinct contrast to the wineries, fine food and arts and crafts venues of the region (ATA 2004a, 2004b).

Training and support of the indigenous businesses and cooperatives is complemented by exposure to the mainstream tourism industry. There are growing linkages with regional tourism bodies. Mainstream tourism providers see this as an opportunity to provide authentic indigenous experience by cooperating with the indigenous entities in marketing the packages worldwide and therefore new cooperative linkages are formed. Finally the indigenous tourism providers are assisted with international marketing campaigns where promotion is actively pursued through schools and existing tourism businesses in the region such as the vineyards and the mineral mines (ATA 2004a).

In addition to the above training schemes the Australian State and Federal tourism authorities provide financial and logistical support to indigenous tourism companies. Financial assistance includes audits and

performance evaluations to maintain a standard quality (ATSIC 2003). Since the introduction of the Internet and especially after the Sydney Olympics, indigenous tourism companies have used the Internet to a larger extent to establish a presence in global tourism trade whilst at the same time most have used this medium to communicate with potential customers. As pointed out by Anckar and Walden (2001), companies offering tourism services in a region learn about the effectiveness of the Internet in promoting their tourism services globally and subsequently acquire the Internet to integrate it in their sales and marketing portfolio as a strategic move to transform their businesses into entities offering services to very distinct groups of customers. To achieve this, the first move is to offer the big suppliers (e.g. the international travel and tourism providers, wholesalers, and local partners) services as a middleman. By doing this, companies have to acquire and infuse certain globally recognized practices in order to be compatible with the requirements of the wholesalers in the developed world. The Internet becomes a very cheap tool in searching and acquiring ideas and practices that companies normally use. It also allows exposure and so the company in the developing region, either in the context of a cluster or by itself depending on its size and uniqueness of its offering, can also negotiate with all the new suppliers of products and the other services offering them access to new clients. Secondly, it can take advantage of communicative abilities of the Internet in allowing connectivity in geographically dispersed locations by allying itself with a tourism hub that serve small regional communities and in return provide the technological platform for the regional tourism hubs thereby offering them access to information and resources that they need to continue their previous operations. Therefore it is safe to assume that IT and the Internet provide a number of options as far as partners and the potential customer base are concerned. As the company links with each of the partners, each partnership is a structural option where the company is allowed to focus on a specific niche; therefore each of these options is a way for each company to differentiate itself from the rest of the companies offering the same type of service.

Besides the direct intervention of the Federal and State Governments,



local and national indigenous support bodies play a key role. As far as travel and tourism is concerned, one of the examples of the regions specific indigenous hubs is the Aboriginal Tourism Australia (ATA). It is the foremost national organisation for Aboriginal and Torres Strait Islander tourism within Australia working to benefit the community and build cultural, environmental, and economic sustainability whilst maintaining cultural values. In addition to developing and promoting indigenous tourism, it works with non-indigenous operators and publishes numerous brochures which help visitors understand how to respect indigenous communities (ATA 2004a, 2004b, 2004c). Besides providing exposure ATA provides training and infrastructure support for its members and uses the websites as a source for exposing companies specialising in Aboriginal tours. ATA also provides assistance to existing tourism companies to promote the uptake of Aboriginal and Torres Strait Island tourism.

Three regions have taken the initiative to promote indigenous tourism. Gringai Aboriginal Cultural Tours is one of these regions. This region is developed and maintained by the New South Wales (NSW) Tourism Commission and the NSW National Parks and Wildlife Service (NPWS). By working together these two government bodies are responsible for developing and maintaining the parks and reserve systems, and conserving the natural and cultural heritage of the state. Although indigenous tourism is being promoted as a means to develop self-sustainability of the indigenous populations of the Gringai Aboriginal areas, nonetheless the Government of the NSW acts as a monitoring mechanism in maintaining a specified standard of service via enforcement by the Tourism Commission of NSW. The mandate of the Tourism Commission is to safeguard protected native flora and fauna in NSW, and also to protect and manage Aboriginal sites, objects and places of special significance to Aboriginal people (NPWS, 2004).

The other two areas are both in Western Australia (WA). These are the Karijini National Park Visitors' Centre in the Pilbara region and the Kimberley Regional Tour in the Kimberley region. The Industry Development and Visitor Servicing Division of the West Australian Tourism Commission ensures that the appropriate product is in place for visitors to enjoy and that

destination and product information services and booking facilities are provided throughout WA to enhance visitor experiences and increase the likelihood of them increasing their length of stay. In addition this body facilitates the dynamic development of indigenous tourism through raising the profile of nature-based tourism and developing niche sector products, such as indigenous, cultural, educational and health tourism as well as cruise shipping. In addition it provides the managerial framework for visitor servicing to operate efficiently and effectively throughout the State, enabling the provision of information and bookings to be made using telecommunication and Internet technology. This includes data collection and data distribution (KBT 2004).

The activities of the Kimberley Regional Government provide a good example of how the Government Agencies have acted to provide service and training whilst at the same time encouraging differentiation based on cultural and tribal backgrounds. In partnership with the West Australian Tourism Commission, the Kimberley Board of Tourism manages the training and development of regional tourism and also promotes indigenous development and economic self-sufficiency by focusing on the unique attribute of the tribes that inhabit the Kimberley region (KBT 2004). Each of these national parks acts as a tribal area where tribal or community specific tourism is developed. The packages highlight unique aspects of the region where the national park is located and the tribes that inhabit the parks. The tours focus on:

- Indigenous cultures of each region;
- Unique flora and fauna of the region;
- Food and beverages unique to the region;
- Plants and herbal remedies specific to the region; and
- Tribal oral history, songs and dances that signify the differences between each individual tribe.

This specific differentiation based on regions coupled with the Internet-enabled communication can allow indigenous tourism not only to promote indigenous tourism but also to enlighten tourists and highlight the diverse facets of indigenous life in Australia and to enhance the tourist pull factor.

Thus the indigenous tourism in Australia lends itself well to the following proposed framework.

## **The Proposed Framework**

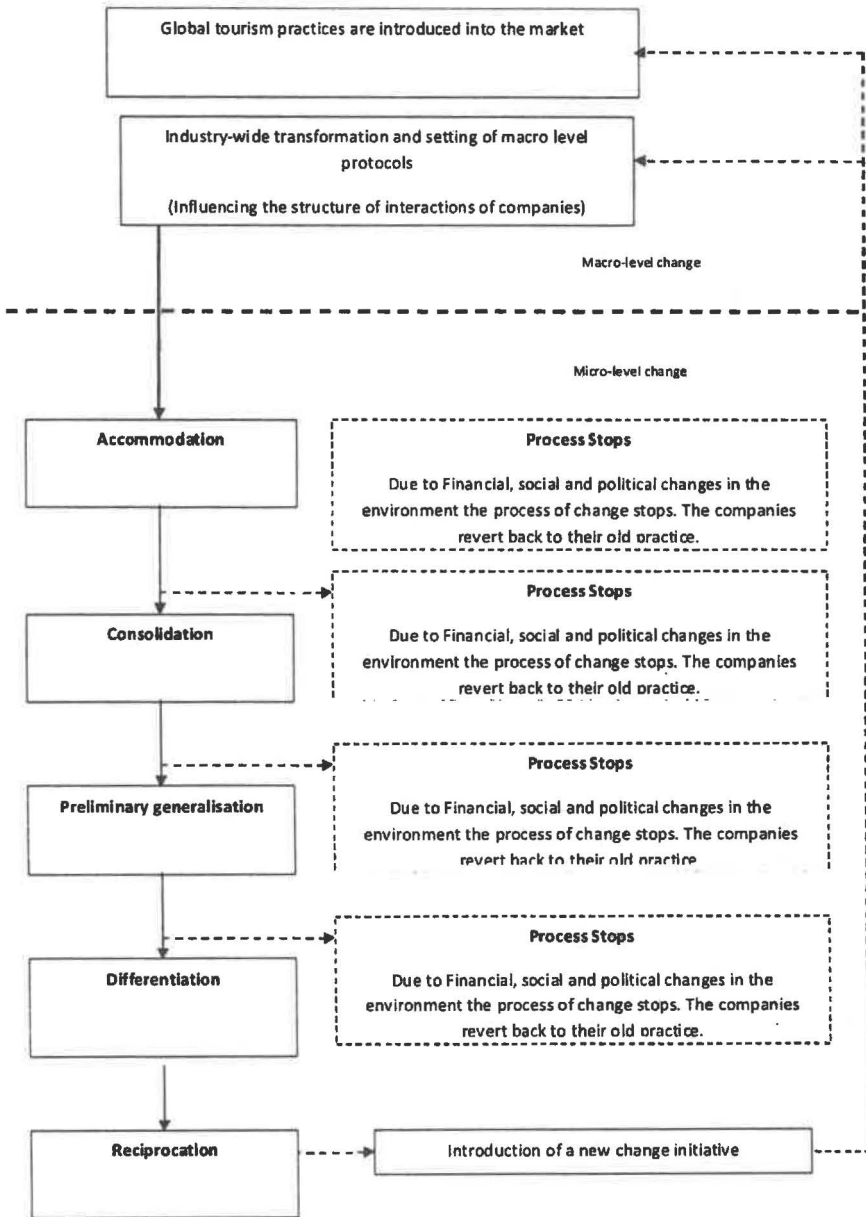
The literature review suggests that industry factors affect the uptake of innovation in the global tourism industry and positively influence innovation in developing countries (Anckar and Walden 2001; Bloch, Pigneur and Steiner 1996; Buhalis and Main 1998; Buhalis and Licata 2001; O'Brien 1998, Van Rekom, Teunissen and Go 1999, Wober and Gretzel 2000). These factors include:

a) The trigger for the introduction of the ICT. This is because Internet is a cheaper tool to learn about other regions in terms of tourism development and for marketing individual services; and

b) The enhancement of inter-company relationships. This is because an organization's ties to other organizations can either broaden or restrict its awareness of environmental trends and may also expose it to various adaptive responses employed elsewhere in the industry.

The above factors both contribute to the extent and scope of uptake of innovation. In general, becoming members of the tourism industry requires a close adherence to rules and regulations of the governing authorities in the industry. Figure 1 is a framework indicating the dynamics of macro level change and micro-level strategic choice. Figure 1 also shows the change in the industry starts with unifying infusion of new technology at the macro level where the newcomers potentially mimic or are forced to duplicate the practices of the incumbents so as to be allowed to operate and survive. At the micro level, however, where each company is viewed in terms of its value chain, after accommodation, and generalisation, the companies aim to differentiate themselves based on the type of service and the experience which they bring to their customers.

**Figure 1: The proposed ICT innovation uptake framework showing dynamics of uptake at macro and micro levels.**



At each stage a company may be able to go on and develop further but since the financial resources of indigenous companies are rather limited, depending on the availability of resource, companies go to the next stage or back out. Companies that have backed out will either be deemed illegitimate by the industry or forced to move out of the industry, or they carry on with their previous business practice they will know, however, they are running their business at the risk of being set aside, taken over, or operated at lower margins of profitability. After setting the macro protocols tourism companies usually go through five processes. These consist of:

**1) Accommodation:** In order to be able to operate, each tourism company must conform to the regulations set out by the local travel authority plus the regulations of IATA. If a tourism company does not comply with these regulations, it cannot operate and therefore cannot exist as a tourism company in the industry;

**2) Consolidation:** This refers to the structural changes that tourism companies make in order to mainstream their operations to ensure compatibility with the industry regulations and norms, and in the case of travel agents, system infrastructures. For example, if the tourism companies all use a certain system, it make sense to use that system to be compatible with suppliers. Other agents are, of course, part of one's value network;

**3) Preliminary generalization:** The above compatibility will undoubtedly lead to similarities in operations and unification in practice. At this stage technology has not evolved to meet this process and therefore tourism companies and agents are more generalists than specialists;

**4) Differentiation:** Technology will undoubtedly mature. Therefore it is possible for tourism companies to carve out specific niches in the market and to focus solely on specific populations within that niche;

**5) Reciprocation:** This refers to the strengthening of relationships between agents and also the tourism companies' own value systems as the Internet allows cooperation amongst partners at a high speed and with improved effectiveness. Bonds between companies will become stronger and thus strengthen the institutional grip on the inter-organizational networks.

## **Discussion**

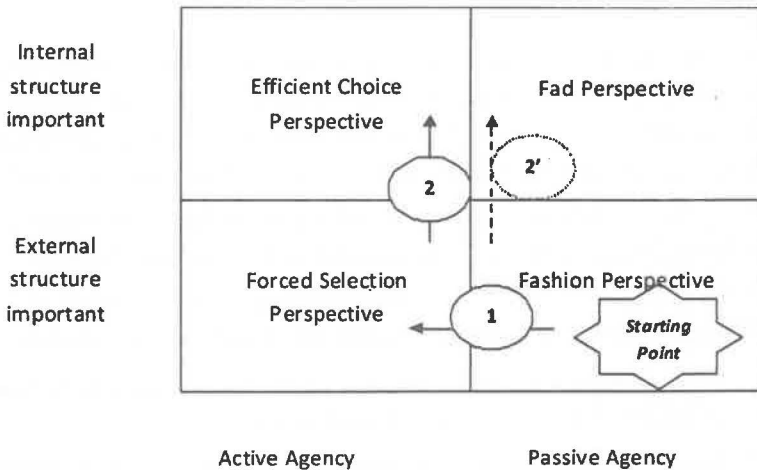
As the framework in Figure 1 illustrates, from a macro perspective,

the initial trigger for change results in setting a uniform working platform as a boundary within which change can take place. In the case of the developing indigenous tourism companies, the government has the responsibility for initial training and development in the sector and acts as a primary networking platform between the indigenous focused tourism companies and the mainstream tourism providers. By doing this the government agencies in charge of promoting and developing tourism become the unifying agents between this new service and traditional mainstream tourism providers. Through alignment of the indigenous tourism companies with mainstream tourism companies, established tourism practices are replicated in the indigenous tourism companies. This isomorphic change imposes quality controls that are standardised throughout the industry. In terms of cluster level change, diffusion occurs in a predetermined set of norms. In a sense the industry has already chosen the "right path" for the companies, and the "right way" of operating is predetermined for all tourism companies involved. However, within these predetermined norms, companies have a strategic choice in selecting their points of differentiation from other participants in the industry.

Dobson (2002:39) developed an alternative model with regard to the legal and professional regulations on the way the indigenous companies are structured. In this model the change and final "structuration" and form selection of indigenous companies describes a difference in outsourcing and the role of State Government in the outsourcing decision. This approach has been used and further developed to show the process of structuration across all indigenous tourism companies in Australia. As the framework indicates, from a macro perspective the initial trigger for change results in the setting of a uniform working platform that acts as a limit or a barrier to being different. This platform is a component of the technology provided. Thus the external structure is standardized and members of the tourism industry have no say in the scope and extent of the uptake of innovation. This is highlighted by an initial shift from fashion perspective to forced selection perspective. However, once the macro trace or the standardized technology is in place, companies actively seek to differentiate themselves. One way is to develop a cluster-like cooperative system where the companies offering indigenous tourism packages act as a go-between among the players in the industry by providing services at a lower cost. In the past such services had to be developed in-house at a high price by the brokerage houses.

These brokerage houses may be large tourism companies or companies dealing specifically with packages that are out-sourced. The inter-company cooperation and networking by companies offering indigenous tourism can later give rise to mutualism and a new paradigm of interaction among organizations. This is different from the competitive paradigm. This is often referred to as pooling of resources (Thompson 1967) where companies cooperate at the macro level in order to compete for a bigger share of their niche market. This paradigm is equivalent to the shift from a forced selection perspective to an efficient choice perspective as indicated by arrow number 2 in Figure 2 below.

Figure 2: Development of the model proposed by Dobson (2002).



The uptake of the innovation is based on an experimental short-term basis in which companies are not sure about the future of an innovation. Thus the uptake takes the form of the dotted arrow 2 in Figure 2 and could be said to be 'pushed' by the external agent/s. However infusion of innovation is not always a push mechanism because the way the industry is structured is not always a push down the chain of command which is adhered to by all the members. Rather, in some cases especially where IT is used, smaller companies can shift the balance of power to themselves and thus the players in the network change their role and strategy from a push to pull (McMaster et al. 1997).

In the case of indigenous tourism companies the evolution of a new business model can be traced as a primary move from "fashion perspective" to "forced selection perspective". At this stage the Commonwealth Government, through financial and managerial support and training of potential managers in the communities, set up layers of limit or normative boundaries where the initial modelling of business is based on a standardised prescription. However once the initiative starts, indigenous groups such as the ATA provide training and support for the communities whilst having in mind the unique cultural and regional and linguistic characteristics of those communities. Therefore the initial push to the "forced selection perspective" is later followed by a pull or a move to "efficient-choice perspective" as illustrated in Figure 2 above.

In 2004 the ATSIIC was disbanded by the Commonwealth Government of Australia and was replaced with the National Indigenous Council as an appointed advisory body to the Australian Government through the Ministerial Taskforce on Indigenous Affairs. The functions of this regulatory body are:

- To be the primary source of advice on Indigenous issues to the Minister for Immigration and Multicultural and Indigenous Affairs;
- To coordinate and drive whole-of-government innovative policy development and service delivery across the Australian Government;
- To develop new ways of engaging directly with Indigenous Australians at the regional and local level, including through:
  - Regional Partnership Agreements (where there is local interest) to customise and shape Australian Government interventions in a region; and
  - Shared Responsibility Agreements at community/clan/family level;
- To broker relations with State and Territory Governments on Indigenous issues;
- To evaluate and report on the performance of government programs and services for Indigenous people to inform policy review and development
  - To communicate government policy directions to Indigenous people and the community generally; and
  - To manage a number of Indigenous programs.

As the functions indicate with the change in the sector authority, the



technological platform and the aim of the said body has not been any different from the previous body.

Currently, unlike the mainstream tourism companies' services, the Aboriginal and Torres Strait Island tourism services are intended to be enriched by indigenous culture, values, spiritual connection to the land and the people inhabiting the community. These cultural factors result in the promotion and development of Aboriginal and Torres Strait Islander peoples' employment and training within all facets of the tourism industry and also ensure representation of Aboriginal and Torres Strait Island peoples on key industry bodies. At the same time continuous support from the indigenous bodies means that the Federal, State and Local Governments are pursuing a responsive strategy to accommodate the needs of Aboriginal and Torres Strait Island peoples with domestic Australian and inbound tourism. The role of technology then is to facilitate the above processes and act as a catalyst for future community involvement in developing regional potential and promoting this potential worldwide.

## **Conclusion**

This paper investigates the consequences and opportunities created as a result of IT infusion into global tourism development, from a specific institutionalist perspective. IT creates an environment where the old ways of operating no longer apply and new rules or norms have to be developed. These new rules and norms set the conditions within which tourist companies can operate and within which management can make strategic choices. The framework used examines the structure and governance mechanism of the industry by looking at the role of the Internet as a facilitator in learning, a unifier of practice, and as a tool to differentiate sector specific practices from more powerful competitors. It also acknowledges the social context (i.e. role of technology and change in the niche marketing) and the economic outcome of change where competition forces differentiation as a tool for survival. It is suggested that the IT infusion framework for the tourism development in the global market can be used by the industry leaders to actively shape the adaptive trajectory of their companies. These industry leaders can in turn define the way the industry is and should be. They provide blueprints for organizations by specifying the forms and procedures an organization of a particular type should adopt if it is to be seen as a

member-in-good-standing of its class.

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# Does Tourist Satisfaction and Perception Change Over Time?: A Study on Spring Break Tourists in Negril, Jamaica

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**Abstract :** This study has two objectives. One is to examine factors that influence the satisfaction level of visitors to Negril, Jamaica during spring break season in terms of the tourists' experiences in accommodations; activities; (perceptions of) the attitude of local people; attractions; and transportation. The second objective is to study the tourists' concern for the destination's environment in terms of their approval of environmental impact fees and collection methods. In order to investigate the reliability of the research findings, this study compares the results from 1998 and 2002 surveys. The similarities and differences among the two surveys' results were captured by comparing the responses at an 84% level of confidence. For research objective one, there were statistically significant improvements in spring break tourists' satisfaction level in 'attractions', 'accommodations', and 'transportation'. Overall, the approval rate of environmental impact fee in 2002 survey declined from 1998 rate. More respondents are in favor of charging an on-site visitor's fee, but were less in favor of taxing tour companies/cruise ships as a fee collection method. Both studies identified 'visitors have already paid for visit' as the main reason for disapproval of the fee.

**Keywords :** tourists, satisfaction, approval, environment, fee, spring break

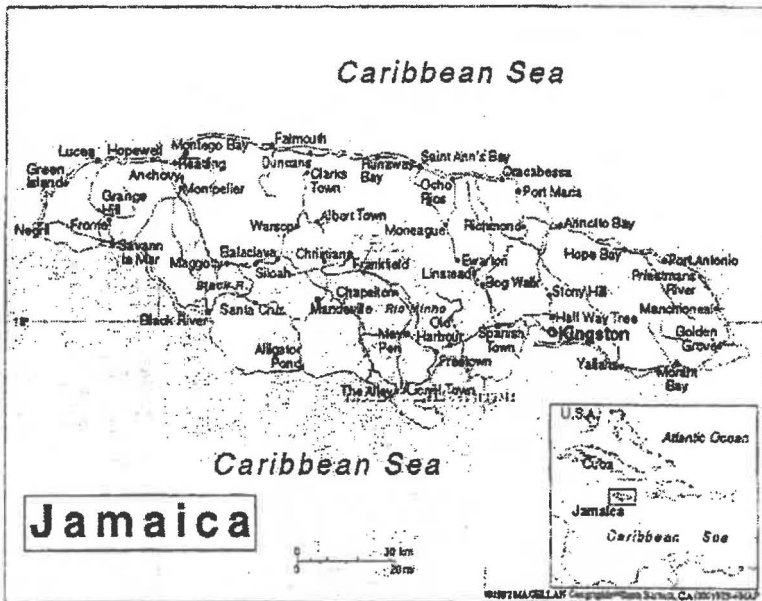
## Introduction

International tourism has become a major international trade category and has maintained a steady increase in both arrivals and expenditures over the last six decades. A specific destination's tourism demand varies depending on the destination's economic and non-economic situations and tourists' confidence in security (WTO, 2008). For many developing economies, international tourism has become the economic mainstay.

Jamaican tourism has recovered from safety and security woes, after enduring a short-run tourism decline resulting from the terrorist attack on the World Trade Center in 2001 and has significantly improved since (CIA, 2005). In 2006, Jamaica hosted over 3 million international tourists, including 1.3 million cruise passengers and has earned over 1.4 billion US dollars (Caribbean Tourism Organization, 2008). With 60 percent of the Jamaican population employed in the service industry, most of which depends upon tourism businesses, it is natural and essential to focus on the growth of their tourism industry. In addition, the international tourism industry ranks as the number one earner of foreign exchange, a necessity for the country's economic development (Luntta, 2000).

Lying just to the south of Cuba in the Caribbean, Jamaica is one-tenth of Cuba's size (110,860 square kilometers and 10,991 kilometers, respectively) (Figure 1).

Figure 1. Map of Jamaica



Jamaica continuously competes with a growing number of Caribbean tourism destinations. It is essential that Jamaican tourism organizations and

industries seek information that increases their market share and enhances the quality of their tourism products and services. Doing so will enable tourism stakeholders in Jamaica to enhance the country's competitive advantage in the Caribbean, which significantly relies on satisfying the international tourists' expectations and needs. Such efforts help to boost a destination's reputation and attract return visitors.

Many international tourists come to Jamaica to experience and enjoy the natural environment (beaches, reefs, waterways, and so forth). Consequently, the principle of conservation and management of these resources has become important for both private industries and environmental organizations to enhance the sustainability of Jamaican tourism.

Among Jamaica's tourism communities, Negril may be its most celebrated. Negril lies on the western tip of the country, spanning two of the country's 14 parishes (Figure 2). Negril bases its economy primarily on tourism and tourism related businesses. Its pristine beaches and extensive coral reefs just offshore make it an attractive destination for those seeking a tropical seaside vacation.

Figure 2. Map of Negril, Jamaica



With tourism crucial to its local economy, stakeholders in Negril are interested in developing a clear understanding of the service features tourists associate with the destination. Of particular interest is ascertaining tourists' preferences for a quality travel experience. In addition, the negative impacts on a destination's environment can be a major obstacle for tourism development, particularly for a sensitive destination like Negril. Since Negril's tourism industry has heavily relied on nature-based tourism activities, successful conservation and maintenance of the environment is crucial. Negril, therefore, needs strategies for funding the preservation of its natural attractions.

## **Research Objectives**

In order to adequately determine how visitors feel about specific dimensions of their travel experience, and to assess their perception of environmental impact fees, this study compares the survey results conducted over two different years in Negril, Jamaica. The focus of the research is to determine if any statistically significant differences exist in the responses from spring break tourists in Negril from surveys collected 1998 and 2002. First, the level of tourist satisfaction on Negril as a tourism destination is measured using the following factors: transportation; accommodations; activities; attractions; and (tourists' perception of) the attitude of the local residents. This study also examines the Negril tourists' perception of the environmental impact fee proposal. Specific questions address how tourists felt the fee should be collected if they approved; and what the main reasons for disapproval might be. Differences and similarities between the two survey results are examined to explore the reliability of the study findings.

## **Literature Review**

### **Tourist Satisfaction Factors in the Tourism Industry**

Tourists presently enjoy access to more information than in the past, making them more sophisticated in their preferences (Williams & Uysal, 2003). It is critical for tourism organizations and industry to understand the factors affecting tourist satisfaction, in order to develop long term policies and business strategies that focus on the attractive dimensions of its tourism products and services.

Customer satisfaction factors have been analyzed in various industries. Chadee and Mattson (1996) found the cleanliness of accommodations to be a chief generator of satisfaction with hospitality facilities among college students. The location of the hotel also proved to be an important factor when customers evaluated their accommodations. Cost, on the other hand, appeared to be a relatively minor factor on satisfaction whereas educational value exerted some influence on activities. Boughton and Fisher (1999) found the quality of a leisure activity as the most important factor influencing country club customer's satisfaction followed by price and service. Study results showed that the country club was able to increase its revenue by 30 percent over a two-year period by focusing the club's efforts on these three factors.

Customer satisfaction has also been studied in relation to customer loyalty (e.g. repeat purchase from the customer's perspectives). For example, Skogland and Sigauw (2004) found employee engagement with guests and hotel amenities to be among the key factors in developing customer loyalty in the hotel industry. They also noted the importance of examining the demographics of their customers to identify factors that might lead to return visits.

Tourist satisfaction on a particular destination has also been extensively studied. Tian-Cole and Crompton (2003) found the quality of experience and the quality of performance attracting different definitions depending on the level from which one viewed them. Accordingly, they referred to previous studies to develop a model to illustrate the relationship between the concepts of tourist satisfaction and service quality. Among the terms used in this study, quality of experience was defined as the psychological effect of taking part in tourism activities. At the transactional level, satisfaction was found to be an emotional response to a destination, whereas satisfaction depended on the overall quality of the experience at the global level. The perceived service quality, at the global level, appeared to rest on an overall evaluation of the destination; while at the transactional level, the perceptions depended on a visitor's perceptions of the destination.

Fallon and Schofield (2003) examined tourist satisfaction in Orlando, FL with respect to five factors: core, secondary, and tertiary attractions,



facilitators, and transportation. Core attractions were the primary reason for the destination choice (e.g. resorts, amusements, participatory activities, and so forth); secondary attractions included shopping and dining facilities; tertiary attractions were identified as activity opportunities such as night life, sports, wildlife, and cultural attractions. Accommodation providers (e.g. hotels) were identified as facilitators and the fifth factor referred to transportation within the destination (i.e. local mobility). The study results found secondary attractions to be the most influential factor on overall tourist satisfaction, followed by facilitators, core attractions, tertiary attractions, and transport.

Danaher and Arweiler (1996) conducted a similar study, addressing customer satisfaction in New Zealand. They identified four components of the tourism experience all customers would necessarily have encountered during their stays. The factors included accommodations, transportation, outdoor activities, and attractions. By examining these variables in terms of tourist satisfaction, the study found accommodations, outdoor activities, attractions, and transportation to be influential in that order. Satisfaction with outdoor activities proved to have the strongest relationship on a visitor's likelihood of recommending New Zealand to others. Shanka and Taylor (2003), in their study of hotel guest preferences in Perth, Australia, found that guests ranked physical facilities, the services they experienced, and the services provided as most important factors. International travelers named the physical facilities most important to them, possibly implying that facility upgrades and proper building maintenance are important focal points for managers.

The existing studies have identified and analyzed factors utilizing a one-time survey among a limited number of samples. Consequently, their findings might have significant limitations in terms of the result's reliability and external validity. In order to explore the consistency of a particular study on tourist satisfaction or perception, it may be ideal to conduct surveys over multiple years utilizing homogeneous groups of tourists at a certain destination. This study differentiates itself from existing literature in that it analyzes the results from two identical surveys conducted on spring break tourists in Negril, Jamaica on two different years.

## **Tourists' Perception on Environmental Impact Fees**

The second research objective stems from the need to develop strategies for funding the preservation of Negril's nature-based tourism resources. A tourism destination such as Negril provides key tourism products and services that rely a great deal on the natural environment. Effective management of the environment is a major success factor for tourism policy makers and organizations. Studies have criticized the reduction in, or lack of, public funds to maintain natural attractions in many tourism destinations (Eagles, McCool, & Haynes, 2002 cited in Reynisdottir, Song, & Agrusa, 2008). Securing financial resources to protect those natural attractions has always been a top priority of a destination for its sustainable tourism management (Reynisdottir, Song, & Agrusa, 2008).

One of a limited number of studies evaluating tourists' approval of environmental impact fees is Lee and Pearce (2002). In their study on northern Australia, tourists' perception was analyzed in relation to different tourism settings and activities. The researchers found tourists are more likely to approve of fees for the use of world heritage sites, ski fields, hot springs, rainforests, wilderness areas, national parks, and the Great Barrier Reef. They were less likely to approve of fees for the use of beaches, rivers, lakes, dams, city parks, city beaches, and parks and gardens. The study results demonstrate the importance of considering the type of tourist activities when local governments and tourism organizations design strategies to levy environmental impact fees. Rivera-Planter and Munoz-Pena (2005) analyzed responses from visitors to four Mexican coral reef natural protected areas in terms of an increase in protection fees, a proposed demand management tool. They found that tourists were willing to pay more if their fees were assured to be used for nature conservation and claimed this fee system as a positively effective management tool to deliver a healthy, biodiverse, and enjoyable reefs for current and future tourists and local residents.

This study intends to apply a similar approach as the existing studies to investigate a destination's environment management issues. A particular research interest is funding the conservation of the natural tourism resources of Negril, Jamaica. As an exploratory study, international tourists' perceptions

of the implementation of environment protection fees, and their preferences on the method of fee collection, were surveyed.

## **Methodology**

Conducting a onetime survey may not be sufficient to eliminate concerns of reliability of study results, since the consistency of research findings can't be examined over an extended period. Replicating the same study in other settings or using other subjects also exposes it to a potential lack of control because of confounding factors from the variability of the settings or subjects. In order to address these concerns, it would be ideal to conduct research over an extended period in a consistent manner (i.e. the same survey instrument, the same or similar study subjects both in location and in population). It is expected that more meaningful outcomes for a destination's tourism organizations and businesses can be derived from this approach.

In order to identify the differences in survey results conducted on two different occasions in Negril, Jamaica, a survey was conducted in 2002 and compared with the results from a 1998 survey analysis done by Lee (1999). The first part of the survey questionnaire assessed the tourists' satisfaction with Negril as a spring break destination in terms of attractions, activities, transportation, accommodations, and the attitude of the local people. The second portion asked the tourists to provide their opinions (approval or disapproval) concerning charging fees to protect the Negril environment; and their thoughts on how those fees should be collected.

This study relied on the comparison of confidence intervals around individual means or percentages of responses to a survey instrument, in order to assess the existence of statistically significant changes in the spring break tourists' responses between 1998 and 2002. A confidence interval is the range of values within which the population mean would fall a certain percentage of the time. When the confidence intervals around two sample means don't overlap, a statistically significant difference exists between the two groups (Julious, 2004). According to Newcombe (2000) who advocated the use of confidence intervals as an alternative approach to a typical mainstay of statistical inference - hypothesis testing (e.g. *t-tests*), a confidence interval provides much more information such as the range of

values in original units, whereas the hypothesis test simply gives a very indirect measure.

For this study, 84% confidence intervals were calculated rather than more typical 90% or 95% confidence intervals, in order to conduct comparative analysis between the two survey results. This is to avoid confusion regarding the cases where confidence intervals (95%, for example) overlap, but significant *P-values* are observed. Non-overlapping 84% confidence intervals around individual means would equate *P-values* approximately close to a 5% level of significance. In other words, 84% confidence intervals would ensure a level of statistical significance between the two groups at 5% or lower when the two confidence intervals do not overlap (Julious, 2004; Newcombe, 2000).

## **Survey Location**

Seven Mile Beach, Negril's ocean front, extends from Bloody Bay on the east to the Negril River on the west. This pristine beach is only 50 miles southwest of Montego Bay, Jamaica's chief tourism gateway, and is now one of the most heavily used beaches in the Caribbean. It is a popular destination for the typical "sun, sand, and swimming" vacation among U.S. college students during spring break season. Vendors on the beach prosper during this period. Along with daytime activities such as sailing and SCUBA diving, it also offers an attractive night life, with numerous bars and restaurants along its ocean front.

## **The Questionnaire**

The Coral Reef Preservation Society, a non-government organization (NGO) in Negril, is interested in specifying factors that influence tourist satisfaction and in identifying feasible strategies to manage one of its most important tourism assets, the natural environment. One possible strategy is to collect environmental impact fees to help protect the Negril's environmental resources. At the request of, and in consultation with, the Coral Reef Preservation Society of Negril, a survey questionnaire was designed in order to ascertain customers' perceptions of their experience while visiting Negril, as well as to reflect their approval of proposed fees to

protect the environment.

The first part of the survey refers to tourist satisfaction in relation to certain dimensions of the overall travel experience. Based on a literature review, the five factors used as indicators of tourist satisfaction on a destination were: transportation; accommodations; activities; attractions; and attitude of the local residents. An 11-point Likert scale was used for measurement to allow the respondents to record their evaluations with a degree of precision, and to treat the data as continuous in its analysis (Cummins & Gullone, 2000). The 11-point scale used three anchors, with an answer of 1 indicating the subjects' lowest "dissatisfaction," an answer of 6 indicating "no opinion," and an answer of 11 indicating the highest level of "satisfaction".

Each of the five factors was subdivided into individual elements relating to their respective categories. For instance, transportation includes plane, rental car, moped or motorbike, bus tour, and taxi. The average of the sum of responses applied to the subcategories was then used as an indicator of overall satisfaction. Both 1998 and 2002 surveys were conducted the same way, so the results from two studies are comparable.

The second set of questions related to impact fees. The first of these questions asked, "Because a majority of tourists derive enjoyment from natural environments, it has been suggested that each tourist pay a fee to help protect them. Do you approve or disapprove of this suggestion?" If they approved, they were then asked to check the boxes corresponding to what they considered to be the best methods of collecting the fee. The choices included: "on-site visitor's fee" (at waterfall, trail entrance, and so forth), "embarkation or debarkation fee", "environmental protection fee added to hotel bills", "tax on tour companies and/or cruise ships", or "other." The last question adduces reasons for the disapproval of environmental impact fees. Those who disapproved were asked to check a box corresponding to what they considered to be the best reasons for their disapprovals. The choices included, "visitors should not have to pay to protect the natural environments", "visitors have already paid to come to the Caribbean", "people who live in the Caribbean should pay the cost", and "other".

## **The Survey**

Sixteen college students enrolled in the "Island Eco-tourism" class were involved in data collection. Before a field trip to Negril, Jamaica, they attended classes preparing them to conduct on-site surveys, including obtaining Institutional Review Board (IRB) certification. These classes taught techniques for administering the surveys, familiarized the students with the community they would be visiting, and allowed the students to address any concerns that they might have related to the study procedures.

Data collection was conducted during the first week of March, 2002. Each student administered 30 surveys. They were instructed to alternate genders when selecting subjects so that the sample would contain 50 percent males and 50 percent females. Ten surveys were administered by each student on Monday, Wednesday, and Friday. Each survey lasted about 20 minutes. Since spring break season is considered the peak season for Negril tourism, and that very little study has been conducted on this unique travel market (Matilla, Apostolopoulos, Sonmez, Yu, & Sasidharan, 2001), this study was conducted among college student tourists who traveled to Negril during their spring break. The non-response rate was negligible. In the 1998 study, the data were collected under similar circumstances; however, the sample size (145) for 1998 was significantly smaller than 2002 survey sample size (470).

## **Study Results**

### **Descriptive summary of 2002 survey respondents**

According to the 2002 survey, the majority of the respondents were first-time visitor to Negril (67%) with the travel purpose of pleasure (94%). Over 90% of the respondents were attending or finished their college education at the time of survey. The majority (85%) of the respondents were from the United States. Hence, the homogeneity of study samples is expected to ensure a credible representation of a spring break tourist population. Males (49%) and females (51%) were evenly represented in the survey sample.

Table 1 summarizes some of the key characteristics of the respondents from the 2002 survey.

First visit to Jamaica	67%	
Number of nights already in Jamaica	1-5 days	72%
	5-10 days	22.5%
	11-15 days	2.5%
	others	3%
Purpose of trip	pleasure	94%
	business	3%
	visit relatives/friends	3%
Travel arrangements	all-inclusive	32%
	partial-inclusive	34%
	non-package	33%
Gender	male	49%
	female	51%
Age	less than 25 yrs. old	46%
	25-34 yrs. old	20%
	35-44 yrs. old	19%
	45-54 yrs. old	10%
	older than 54 yrs. old	5%
Education	some high school or less	1%
	high school graduate	6%
	some college	46%
	college graduate	32%
	post graduate	14%
Country of residence	United States	85%
	England	7%
	other European countries	7%
	other countries	1%

## **Objective 1**

The first objective of the study was to determine if any significant differences in the tourists' satisfaction levels existed between the surveys from 1998 and 2002. The respondents' satisfaction levels were measured in the following five dimensions:

1. transportation,
2. accommodations,
3. activities,
4. attractions, and
5. attitude of local residents.

For the 2002 survey, respondents rated 'activities' (average rating of 9.33 out of 11) as the most satisfying factors of their trip to Negril, followed by 'attractions' (8.95), 'accommodations' (8.66), 'attitudes of local people' (8.60). The least satisfactory factor was 'transportation' (8.03). The order of spring break tourists' satisfaction factors is similar to the results from 1998 survey, except that 'attitudes of local people' (8.46) ranked ahead of 'accommodations' (8.14) in 1998 study.

As Table 2 shows, the means improved in all five factors between 1998 and 2002. In order to see if there were any statistically significant changes in tourists' satisfaction level in each of the five factors, confidence intervals (at 84% significance level) around the mean values of the responses have been computed and compared (Table 2).

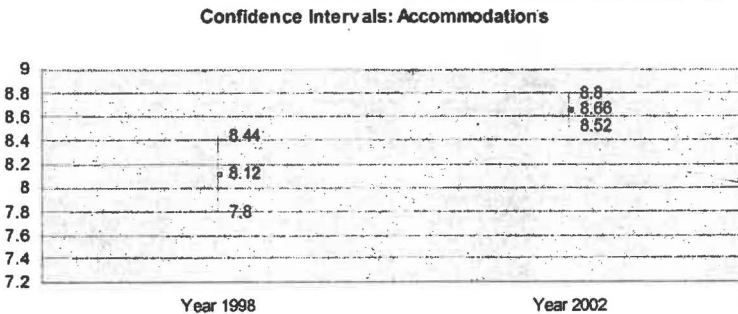
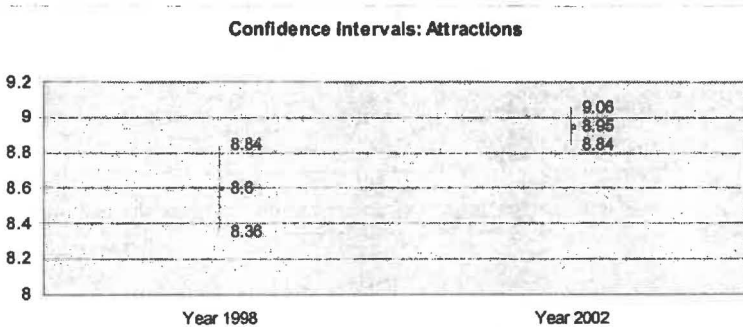
Significant differences emerged between the years 1998 and 2002 in three key factors (Attractions, Accommodations, and Transportation), since no part of the two confidence intervals overlapped with one another for these (Newcombe, 2000). For 'attractions', the mean of the survey outcome in 2002 (8.95) increased from the 1998 survey data (8.60) and the lower bound of the 2002 confidence interval (8.84) is the same as the upper bound of 1998 confidence interval, with no overlapping between the two confidence intervals. Tourist's satisfaction on 'accommodations' also revealed a statistically significant improvement from 1998 (mean = 8.12) to 2002 (mean = 8.66). In addition, neither confidence interval overlaps, with the lower



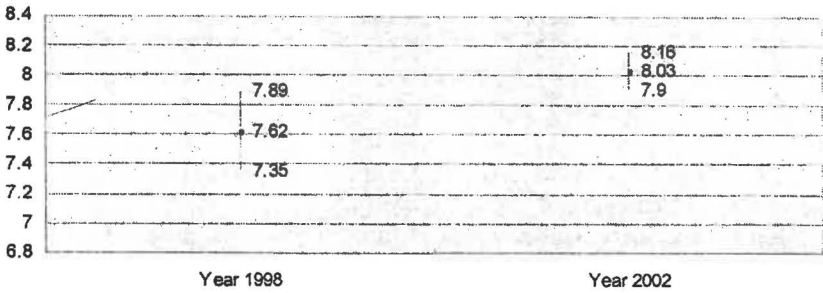
bound of 2002 confidence interval (8.52), being higher than the upper bound of 1998 data (8.44). A similar result was identified for 'transportation'. A significant improvement was detected between 1998 (mean = 7.62) and 2002 (mean = 8.03). The two confidence intervals don't overlap with each other, with the lower bound of 2002 data (7.90) being higher than the upper bound of 1998 survey result (7.89).

No statistically significant difference emerged for the respondents' evaluation on 'Attitude of local people' and 'Activities'. For both factors, minor improvement in the mean value of tourists' satisfaction level has been observed - 'attitude of local people' (8.46 to 8.6) and 'activities' (9.2 to 9.433). The 84% confidence intervals from the 1998 and 2002 study responses overlapped over significant part of the intervals for both factors.

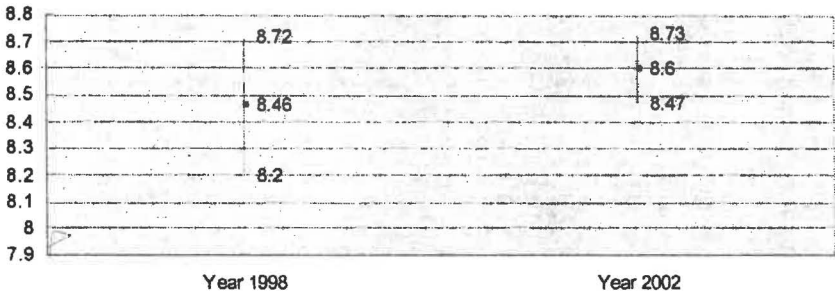
Table 2: Confidence intervals around the mean score values for five customer satisfaction factors from 1998 and 2002 surveys (at 84% level of confidence)



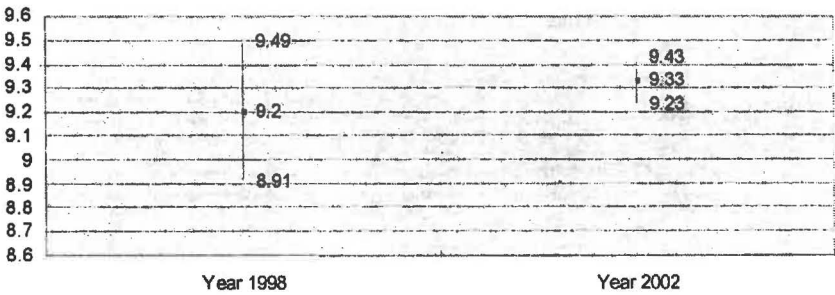
**Confidence Intervals: Transportation**



**Confidence Intervals: Attitude of Local People**



**Confidence Intervals: Activities**



## **Objective 2**

This study set out to determine if any significant differences occurred in tourists' perception of environmental management issues in terms of: (1) tourists' approval rates for the prospect of an environmental impact fee; (2) how tourists felt that fee should be collected if they approved of it; and (3) the individual reasons for those who disapproved of the fee. Survey responses from 1998 and 2002 studies were compared. After a discussion and consultation with The Coral Reef Preservation Society of Negril, the following five options were provided as the means of fee collection:

1. On-site visitor's fee (e.g. at a waterfall, trail entrance, and so forth);
2. Embarkation or debarkation fee;
3. Environmental impact fee on the hotel bill;
4. Tax on tour companies and/or cruise ships; and
5. Other.

In addition, the following four options were listed as the 'reasons for disapproval.'

1. Visitors should not have to pay to protect environment;
2. Visitors have already paid for visit;
3. People living in Caribbean should pay the cost; and
4. Other

First, the confidence intervals for the percentage of visitors who approved of environmental impact fees were computed and compared between the two years (Table 3). The approval rate fell from 70% (1998) to 65% (2002). However, no statistically significant differences emerged in the approval rates, with the lower bound of 1998 rate (64%) below the upper bound of the 2002 rate (68%).

The confidence intervals for the preference of the four collection methods of the environment impact fee were computed and compared. Since there was no response for the "other" category in the 1998 survey, it was not included in the comparison. In both surveys, respondents chose

'embarkation/debarkation fee' as the most preferable method of collecting the fee, followed by 'on-site visitor's fee'. According to responses from two surveys, no significant difference appeared among three of the four methods. A significant difference did appear for the "tax on tour companies and/or cruise ships" variable between the two years. The preference for this method by the 2002 survey respondents was significantly lower than that of respondents from 1998 study (Table 4).

Table 3: Confidence intervals around the respondents' approval rate of environmental impact fees from 1998 and 2002 surveys (at 84% level of confidence)

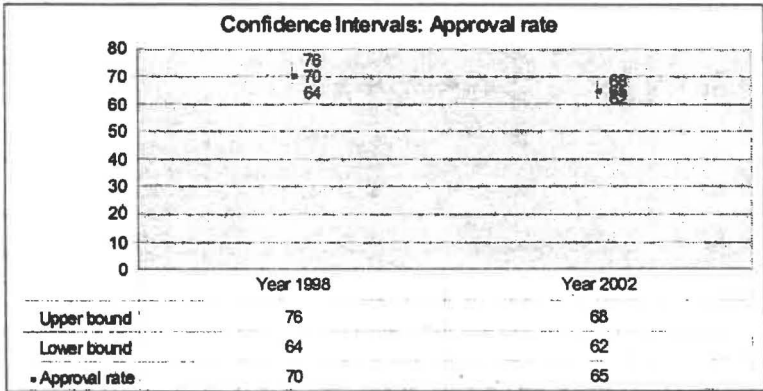
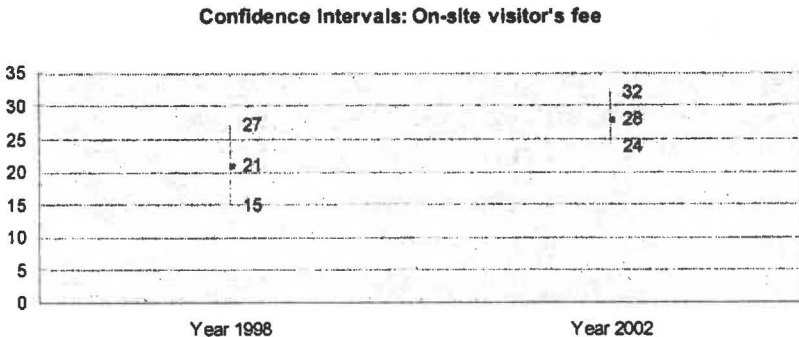
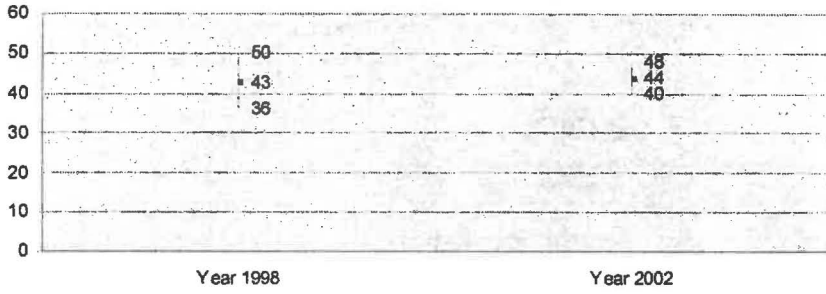


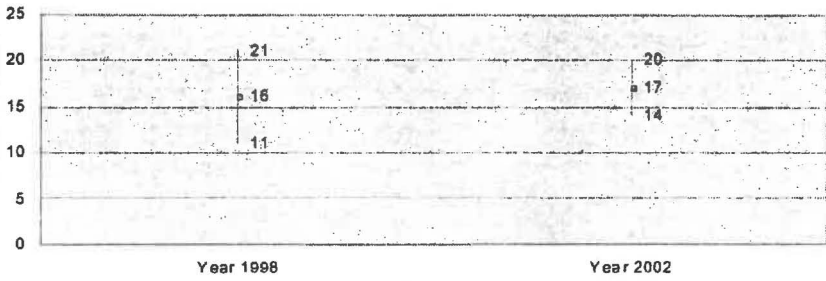
Table 4: Confidence intervals around the percentage of respondents' preference (among those who approved of fee) on the environmental impact fee collection method from 1998 and 2002 surveys (at 84% level of confidence)



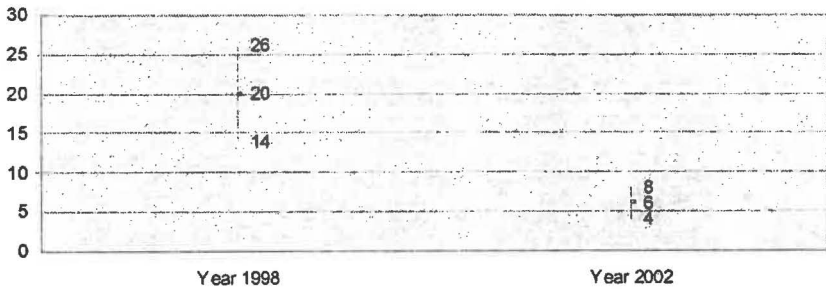
**Confidence Intervals: embarkment/debarkment fee**



**Confidence Intervals: fee on hotel bill**



**Confidence Intervals: tax tour company/cruise ship**



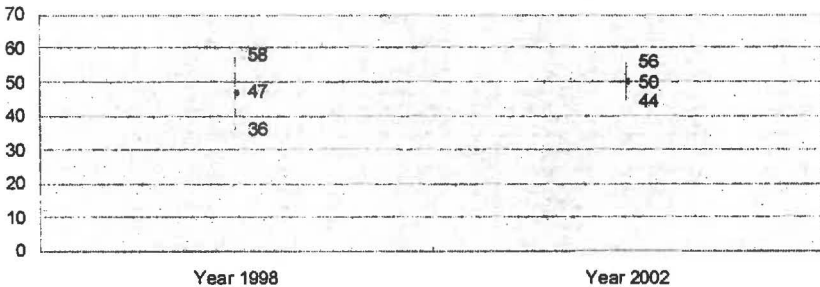
Finally, Table 5 compared the percentages and confidence intervals of each of the reasons for the respondents' disapproval of the fee. No significant differences appeared between the two survey results. In both studies, respondents chose 'visitors have already paid for visit' as the main reason for their disapproval of environmental impact fees (47% and 50%, respectively).

**Table 5: Confidence intervals around percentage values for reasons of disapproval of environmental impact fee from 1998 and 2002 surveys (at 84% level of confidence)**

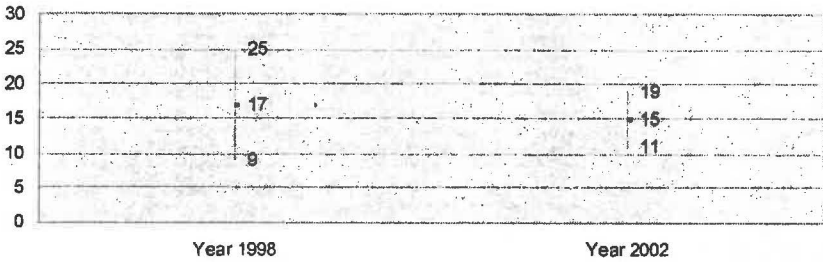
**Confidence Intervals: visitors should not have to pay to protect environment**



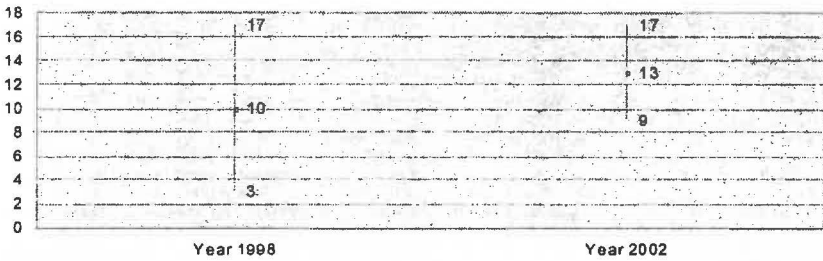
**Confidence Intervals: visitors have already paid for visit**



**Confidence Intervals: people living in the Caribbean should pay the cost**



**Confidence Intervals: other**



## **Discussions and Concluding Remarks**

The first objective of the study was to determine if the satisfaction level of spring break travelers to Negril, Jamaica has changed over certain period of time. The 2002 survey results were analyzed and compared with the 1998 study in terms of transportation, accommodations, activities, attractions, and attitude of local people.

For both surveys, the respondents' overall evaluation on their satisfaction levels was quite satisfactory, with every factor's mean score over 8.0 (based on 11-point Likert scale) except 'transportation'. Based on survey responses, it is clear that Negril, as a spring break destination, achieved a significantly higher overall tourist satisfaction level in 2002, compared to the 1998 study results.

Statistically significant improvements have been detected in three factors - attractions, accommodations, and transportation. Even though some

improvements have been observed in 2002 survey, the respondents' evaluations of 'attitude of local people' and 'activities' did not seem to be significantly different between the two survey results. This study finding provides significant implications toward Negril's tourism management and development. First, depending on the characteristics of tourist satisfaction factors, the impact of efforts by the tourism destination might be quite heterogeneous. During the 4 years between the two surveys, the tourists' satisfaction increased more dramatically for the physical and tangible factors in comparison with that for intangible factors. Second, in order to see the short-run impact of policy development (by tourism organizations) and business practices (by tourism industry) in a destination like Negril, Jamaica, it makes more sense to put more emphasis and invest on the development of infrastructure, lodging facilities and major sites that tourists visit. However, it may require more long-run planning and patience for the tourism stakeholders in Negril to achieve improvement in tourist satisfaction factors, in terms of tourist activities and the tourists' perception of the local population's attitude toward tourism.

For the 'attractions' factor, a statistically significant difference emerged between the years 1998 and 2002. Over a 4-year period, improvements to existing attractions, access to new attractions, or changes in visitor preferences may have occurred. The result also might indicate a possible trend in attraction improvement or visitor preference when examining this particular population in relation to Negril.

The study identified a statistically significant difference for the 'accommodations' factor between the two years, as well. This might indicate the local lodging companies' tremendous effort to provide improved service quality to spring break travelers over the years, considering that the types of lodging facilities in which the survey subjects stayed were quite homogeneous and were all located along 7-mile Beach.

The 2002 survey respondents' evaluation for 'transportation' was significantly higher than that of 1998. This result supports the importance of investment in the tangible and supportive variables of tourism services. For example, a project to renovate and widen the main road between Montego Bay International Airport and Negril has been successfully constructed during the time between the 1998 and 2002 studies. This is likely to improve tourists' satisfaction concerning destination transportation.

In contrast with the three previous factors, no statistically significant



differences were identified for 'activities' and 'attitude of local people' between the two years. As the study mentioned previously, it is challenging and time consuming to significantly improve tourists' satisfaction. For example, the 'activities' in Negril, particularly for spring break tourists, are very specific and relatively time-invariant. Also, the spring breakers' encounters with local people might be limited to those who work for the hospitality and tourism industry in Negril.

The second objective of the study set out to determine if any significant differences exist in the spring break travelers' perception of environmental issues in terms of (1) the approval rates for the prospect of an environmental impact fee; (2) how tourists felt that fee should be collected if they approved of it; and (3) the reasons of disapproval.

For the 2002 survey, the respondents' approval rate of an environmental impact fee decreased significantly from 70% (1998) to 65%. Even though the upper bound (68%) of the confidence interval from the 2002 study is lower than actual approval rate (70%), it is still higher than lower bound (64%) of 1998 study. This result implies that it might become riskier for tourism-related government organizations in Negril to prospect and implement an environmental impact fee program as a burden on the tourist. With a lower percentage of tourists who approve of the idea of this type of fee, Negril should expect a certain degree of damage in demand, if fees are levied.

Among the four different fee collection methods provided in the study, the respondents from both surveys prefer 'embarkation/debarkation fee' as the most preferable method (43% and 44%, respectively). A significant percentage of the respondents from the 1998 study preferred a method of 'tax on tour company and/or cruise ship' (20%) but only 6% of the respondents preferred the method in 2002 survey. This may be due to significantly more respondents choosing 'other' as an alternative in 2002 than in 1998. Otherwise, there were no statistically significant differences between the confidence intervals for preference percentages among the three main methods. This implies a strong reliability of the respondents' preferences concerning the environment protection fee collection method, based on the surveys from 1998 and 2002.

Lastly, the respondents who disapproved of the environmental impact fee chose 'visitors have already paid for visit' as the main reason for their disapprovals (47% in 1998 and 50% in 2002), followed by 'visitors should

not have to pay to protect environment' (26% and 21%, respectively). In the 2002 survey, more respondents chose 'visitors have already paid for visit' and 'other', whereas a lower percentage chose 'visitors should not have to pay to protect environment' and 'people living in Caribbean should pay the cost'. Overall, the study results implies that spring break tourists in Negril may ask that more responsibilities be placed on the local government/residents for the protection of their environment and natural resources as a way to ensure the sustainability of the destination. The study identified no statistically significant difference between the years 1998 and 2002 when comparing disapproval reasons, which supports a high reliability for the responses.

## **Limitations**

The study entails at least the following inherent limitations. First, the study samples of two years were both collected during early March, typically the spring break period for college students of the United States. Therefore, the study results may not be applicable to other tourist groups visiting Negril, Jamaica or other Caribbean destinations. Second, the 2002 survey occurred six months after the September 11 tragedy, a time when many Americans hesitated to travel. In other words, the respondents of the 2002 study may not represent typical travelers. Third, the survey assumes product continuity. Either deterioration or improvement in the tourism product that could have occurred over the two sampling periods has not been considered. Fourth, caution should be exercised in drawing inferences from the limited data. It should be noted that the sample size for 1998 was much smaller than that of 2002. Finally, the student surveyors used in this study were at liberty to choose their subjects. They may have rejected certain individuals out of personal prejudices.

## **Future Research**

As mentioned in the introduction of this study, the Caribbean is a highly competitive international tourism market with a list of various destinations. Therefore, conducting additional surveys of spring break populations in other Caribbean destinations might enhance the external validity of the study results. In addition, a survey among visitors in Negril during different times of the year may help Jamaican tourism organizations and industry understand the similarities and differences among its heterogeneous international tourism market segments.

The differences between the attractions variable in the tourist satisfaction

portion of the survey may be due to changes in the characteristics of the destination. Since a significant improvement emerged between the years 1998 and 2002, research should investigate key changes in Negril's tourism-related characteristics during that period of time in order to develop more effective policies and strategies for tourism development in the area. Future studies in both supply side (e.g. development of tourism products and packages, improvement in quality of tourism-related infrastructure and superstructure) and demand side (e.g. tourists' awareness, preference, image, and expectations on Negril) are needed to provide balanced perspectives, particularly in terms of identifying any gaps between the two sides. Lastly, conducting the same survey using a 5- or 7-point Likert scale would be recommended to see if the results of this study with an 11-point scale are robust.

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# Managerial Response to Global Tourism Trends in Accommodation : An Illustration from two Destinations

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**Abstract :** Since tourism is a highly profitable industry with constant growth rate, the competition among establishments is very severe. In order to stand out from this competition crowd and to appeal to the consumers with differential advantage, the hotel managers should try their best to keep up with constantly changing trends in tourism. Therefore, for long term success in hospitality, managers need to be sensitive with the global tourism trends and look for ways to tap into those markets through meeting the changing needs of consumers. Due to this approach, this paper addresses the key trends in the global tourism market. It also tries to determine the level of response of top managers of 4&5 star hotels in two important tourism destinations in Turkey, namely Izmir and Kusadasi, to trends since though limitations the results of the study may be an indicator for the areas of improvement.

**Key Words:** Tourism Trends, Turkey, Managerial Response

## Introduction

Tourism, being one of the worlds' fastest growing industries with the annual 4-5 % increase rate brings high competition within the sector itself. For Turkey, it is one of the most important sectors with 22.5 million international arrivals and 18.5 million US \$ receipts, it carried Turkey to the top 10 in the global list. Though Turkey is quite successful in the world tourism market, in order to keep the share it has, it has to keep up with the trends both in demand and supply sides of the industry. In order to stand out from the crowd of severe competition, following up the trends in both supply and demand sides plays an important role.

Among the application of management and marketing techniques according to changing trends, there are; applying flexible management styles, applying updated marketing techniques, applying strategic planning, focusing on effectiveness, efficiency and yield management. Tourism firms try to meet the needs of changing demand by putting emphasis on issues; CRM, e-tourism, quality management, brand loyalty PR, crisis management and positive media relationships.

## **Global Tourism Trends**

According to UNWTO's reports, tourism seems to be one of the greatest economies in the world in the near future, with expectations reaching up to 1,6 billion international tourist arrivals by the year 2023 where it was 900 million in 2007. Though this forecast is quite positive, it is expected that all the destinations may not get the full share from this increasing rate. The destinations that will be positively affected will be the ones that are using creative, innovative marketing and management techniques, which define their market segments correctly and use suitable marketing strategies that fully cover the changing needs and trends of their customers.

There seems to be four factors that lead to changing global trends and consumer behaviors in tourism, which may be stated as (Baraner, 2006);

- 1) The improvements in the marketing technology and communication,
- 2) General economic conditions,
- 3) The individualization of consumers and,
- 4) The need for growing security.

Current forces for the trends and change in tourism may be summarized as; demographics, global warming, economic factors, social trends, political factors, legislation, safety, technological developments, globalization, glocalization, transportation and market factors (Cooper et al, 2005).

Thus the main global tourism trends of the future may be stated as:

1) Price sensitive consumers trying to maximize the value of the service purchased: Due to global financial crisis that affects all the sectors, the tourism industry has started to get its' share. It is predicted that the consumers will get very price sensitive in 2009 and some of 2010. To respond to this sensitiveness, it is suggested that the tourism providers may use flexible

rating systems like creating different rate groups as Rack Rate, Rack Rate less 10%, etc (Forrester, 2008), Also using travel package and hotel catalogs without stating the prices might be a clever strategy. In addition offering extra amenities and services for standard priced services may also be a good strategy to appeal to consumers who are looking for the highest value.

As an example, German tourism market trends researchers, indicate that for this market Mediterranean looks like the attractive destination, where Tunisia, Turkey and Croatia might be the market leaders with their competitive price advantage (Ergüven, 2008).

2) Increase in e-tourism rate: The use of Internet in travel-planning / booking by both business and leisure travelers seems to continue to grow but at a significantly lower rate than previous years (Yesawich, 2007). Direct on-line bookings by customers are predicted to make up a significant market share by 2010 with access available to most of the population in industrialized countries; "Virtual tourists" will have an increasing demand for multi-media travel information and Interactive TV and mobile devices will increasingly be used for the distribution of tourism products and services.

The majority of tourism organizations are predicted to use Intranets, products and services will reach a much higher level of personalization together with a corresponding demand. The strongly risen share of people over 50s in the industrialized countries will effect a higher demand for e-services related to foreign travel, particularly to long haul destinations and travel for culture purposes as well as eco-tourism and further growth of "time poor" - "money rich" people will consts a high demand for short time holidays while, on the other hand, all-inclusive holidays will be demanded by a large number of people.

3) Expectation for quality service: Today, expectations of a tourist are increased who look for more convenience and value. It is predicted that the level of service quality expectation will increase and the desire for improved services and better working conditions will rise. It is predicted there will be an increase from 2005 - till 2015 in the areas of (Koumelis, 2006)

- Preference for electronic check in procedures 23% → 90%
- Preference for online booking 37% → 70%
- Business class air travel 17% → 33%

Premium class rail travel 22% → 25%

4) Changes in business tourism: Changes in the global economy will have the biggest impact on business travelers in the next decade, according to new research out from Barclaycard Business. The research reveals that long haul air and rail services will see the highest growth with business travel to global destinations (Koumelis, 2006). The principal long term factors affecting hotel demand may be shortly stated as; globalization of industry, demographic and social changes, increasing leisure and holiday time, changes in consumer preferences, economic growth and the overall investment environment. Also, due to crisis some business travel is expected to get shorter or replace with virtual ones like videoconferencing.

5) Family travel (adults with children) is expected to continue to grow at a faster rate than all other forms of leisure travel, as both parents and grandparents continue to look at travel as one way in which to "reunite" families (Yesawich, 2008). 2009 trends indicate tat relative travel will almost double this year due to financial crisis (Ergüven, 2008).

6) Shorter holidays: Duration of leisure travels also (along with the business travel) tend to be shorter due to financial crisis which may also positively impact the demand for closer and neighbour destinations (TUYED, 2007). Short term influences include; cost of travel, price changes and exchange rate parities, travel barriers, marketing and promotion, as well as extraneous factors including legislative/regulatory changes, political stability, technological developments, trading developments, transport developments, and the safety of travel.

7) Price wise comparison: Price wise comparison shopping seem to become more commonplace in 2009 and further. Quality/price ratio and the service value perceived will be more meaningful for travelers which makes marketing efforts more and more indispensable.

8) Incaese in the demand for alternative tourism types: Quite a number of alternative tourism types appear every year. World's leading category of international trade and tourism is increasingly offering a range of different types of products like cultural and heritage tourism, golf tourism, medical tourism, sports tourism, religious tourism, eco-tourism, religour tourism, yachting, sport tousim, MICE and etc.



9) Hotel trends: Not only the demand for alternative tourism types, but also the supply side changes. In order to answer the needs for this demand change, the lodging facilities tend to specialize in areas like; green hotels, thematic hotels, spa hotels, convention hotels, all-suite hotels, etc. Time and cost factors influence hotel building programs. The hotel of the future may be one that is conceived as an "integrated environment design", the form of which may be determined by advanced building technology and innovative computerized systems.

10) Continued concern for safety and security in tourism (Baraner, 2006)

11) Influence of mega events (including festivals) on tourism.

12) Strategic tourism planning applications for tourism establishments, communities, regions and nations.

13) Introduction of new tourism products; like space tourism, Feng Sui spas, adventure tourism, boutique jet airlines, caravanning and slow / relax tourism (Kofteoglu, 2008).

14) Application of destination management and master planning.

15) Sustainability and ecologic supply of goods and services (New Sabah Times, 2008)

16) Tourism media using new channels and tools like movies (Lord of the Rings, The Last Samurai, Troy, The Edge of Reason, Oceans Twelve, The Motorcycle Diaries, The deserts of Morocco, The Chronicles of Narnia: The Lion, The Witch and The Wardrobe and Cold Mountain) and stories and books etc. Among the destinations which had demand increase due to the movies' impacts are (Kobifinans, 2008):

- New Zealand (Lord of the Rings - 2000)
- Cephalonia (Captain Corelli's Mandolin 2001)
- Thailand (The Beach 2000)
- Malta (Troy 2004)
- Kenya (Out of Africa 1985)

17) The cruise industry will continue to enjoy remarkable growth (annual 8-10% increase)

18) Privatization - that is, the transfer of public ownership of

manufacturing or services enterprises to private parties- is a policy option being actively pursued in countries all over the world. The trend toward privatization evolved from a growing realization by governments that state enterprises which are generally much less efficient in the use of capital and labor than private companies in making products and providing services.

Table 1 below shows the summary of the stated trends and how tourism development is adjusted.

**Table 1. Summary of the Mega Trends and the Tourism Development**

<p><b>Demographic factors, especially:</b></p> <ul style="list-style-type: none"> <li>• a smaller number of households;</li> <li>• a dominant model of family 2+1;</li> <li>• increasing number of single people;</li> <li>• increasing number of childless couples;</li> <li>• increasing number of working women.</li> <li>• Late marriages</li> </ul>	<p><b>Political factors, especially:</b></p> <ul style="list-style-type: none"> <li>• continuing challenges in security, terror, health; International power evolving; localisation</li> <li>• changes in Central-West Europe;</li> <li>• integration of the European Union;</li> <li>• liberalisation of international migrations;</li> <li>• unstable political situation in many regions of the world;</li> <li>• international terrorism;</li> <li>• increased importance of safe travel</li> </ul>
<p><b>Social &amp; cultural factors, especially:</b></p> <ul style="list-style-type: none"> <li>• shortened time of working, more free time and longer vacations;</li> <li>• Ageing populations.</li> <li>• Individuals seeking 'authentic' tourism experiences.</li> <li>• Growth will occur in holidays for the retired and for single people.</li> <li>• Changes in tastes—holidays are becoming more specialised, earlier retirements;</li> <li>• increasing number of "two-income" households;</li> <li>• conflicts between identity and modernisation, especially in developing countries</li> </ul>	<p><b>Economical factors, especially:</b></p> <ul style="list-style-type: none"> <li>• Diffusion of information technology;</li> <li>• increasingly dynamic private sectors.</li> <li>• Continued deregulation/liberalisation of international travel.</li> <li>• a bigger disproportion between rich and poor countries;</li> <li>• a bigger financial crisis in a number of countries liberalisation and development of an international trade;</li> <li>• globalisation continued growth (esp China, India);</li> </ul>
<p><b>Technological factors, especially:</b></p> <ul style="list-style-type: none"> <li>• automation and computerisation;</li> <li>• developing of telecommunication;</li> <li>• developing of computing systems;</li> <li>• developing of transport and infrastructure (airports, motorways);</li> <li>• use of modern technologies in everyday life (household articles, sport, tourist equipment);</li> <li>• developing of soft technologies;</li> </ul>	<p><b>Ecological factors, especially:</b></p> <ul style="list-style-type: none"> <li>• intensifying population growth, development, urbanization</li> <li>• a greater ecological awareness in society;</li> <li>• global warming affecting climate</li> <li>• government's growing concern with environment;</li> <li>• conflicts causes by developing of a big agglomerations ( in developing and developed countries );</li> <li>• development of the ecological movement</li> <li>• international collaboration in field of natural and cultural environment protection;</li> </ul>

Adapted: Dwyer Larry, Deborah Edwards, Nina Mistilis, Carolina Roman, Noel Scott and Chris Cooper, "Megatrends Underpinning Tourism to 2020"  
[http://www.crctourism.com.au/WMS/Upload/Resources/bookshop/FactSheets/80046\\_Dwyer\\_SUMMARY\\_SHEET.pdf](http://www.crctourism.com.au/WMS/Upload/Resources/bookshop/FactSheets/80046_Dwyer_SUMMARY_SHEET.pdf)

## **Managerial Response from the Supply Side**

It is quite clear that if hotels want to be in the market 10 years from now, hotel managers need to be sensitive with the global tourism trends and look for ways to tap into those markets through meeting the changing needs of consumers. To lighten up this fact, the literature review on reactions of managers to the tourism trends are summarized below.

1) Changing trend in marketing applicaitons (CRM and other personalized marketing techniques like brand management): Marketing has evolved through lots of stages from production era whereas the latest trend is almost tailor made services for customers. Customer value and satisfaction are today's key words where; customer value is the difference between the customer benefits from owning and/or using a product and the costs of obtaining the product and customer satisfaction is perceived value delivered relative to a buyer's expectations (Kotler, Bowen and Makens, 2006). CRM relates to activities of forming special behaviors among specific people and groups and the ways to change these behaviors (Fisk, 2008). It is about providing successful and continuous communication between the marketer and customers (Acuner, 2001:25). Tourism is not behind since it uses CRM and custom made prepared and designed travel packages and transportation to tourists from different segments. As a tradition, hotel managers used to focus on cost efficiency in the first place, though strategic value-chain issue is gaining recent importance. A strategic value-chain perspective forces logistics systems to be realigned and restructured so that they gain competitive differentiation and advantage in the industry (Cravens and Piercy, 2003:368). Though customer centered value management is mandatory for success, it is not enough since today's business' marketing efforts are aimed to build brand equity to build relations with existing customers and to collect valuable customers for almost lifetime span. In that sense marketing trend for logistics is changing from customer centered service to life time relationship so called customer relationship marketing (CRM). Branding and co-branding strategies also helps achieving customer loyalty and cost sharing among related organizations Hotels usually uses branding according to their segments' differing needs. Table 2 below sets an example to this since Holiday Corporations' lodging establishments use 6 different brands and quality levels according to its segment groups.

**Table 2 -Holiday Corporation's Different Hotel Brands Aiming to Different Market Segments**

<b>Brand</b>	<b>The Characteristic of the Hotel</b>
Crowne Plaza	The lower limit of 5 star hotel
Holiday Inn	Traditional middle class
Hampton Inn	Budget group
Embassy Suites	All suite
Residence Inns	For long stays
Harrahs Hotels	ABD casino hotels

Resource: Chuck Y. Gee (1994), *International Hotel Management*, AHMA, Michigan.

2) Applying TQM and other quality measures and standards: Quality may be described as the totality of features and characteristics of a product or service that bear on its ability to satisfy customer needs (Kotler, Bowen and Makens, 2006). Total Quality Management (TQM) on the other hand is a management approach where culture, attitude and organization of a company aims to satisfy customers. The culture requires quality in all aspects of the company's operations, with processes being done right the first time and defects and waste eradicated from operations and regarding staff as internal customers who should be motivated also. TQM, is a method by which management and employees can become involved in the continuous improvement of the production of goods and services (Hashmi, 2008). It is a management philosophy that seeks to integrate all organizational functions (marketing, finance, design, engineering, and production, customer service, etc.) to focus on meeting customer needs and organizational objectives (Tavmergen, 2002). Though used in production sectors till 1950's, the concept is new to hospitality, with franchise and management hotels choosing to adapt and apply their own quality systems.

3) Privatization and government and private cooperation: According to the UNWTO Business Council, the current trend for promoting destinations in almost all regions of the world is through some sort of destination management organizations. Many countries are aiming towards semi-public but autonomous tourism organizations involving a partnership with both private sector and regional and/ or local authorities. Over the last decade the functions and responsibilities of governments as well as the private sector and society has changed a lot (Hawkins, <http://www.gwutourism.org/>

dm.htm). The traditional approach was centralized promotional and developmental efforts in tourism whereas it is changed towards decentralization of tourism management and promotion and towards public-private sector partnership. With such change, the new, flexible and multi-disciplinary approaches to destination management are needed. In Turkish Tourism public and private cooperation and privatization had its' effects also:

- In Turkey, Istanbul Congress Palace, Cesme Hotel and its annexes, Kemer Marina Hotel, Ilica Motel, Elmadag Auberge, 2 lands in Istinye, Akcay Holiday Resort, Bodrum, Kusadasi and Kemer Marinas have been privatized during 1991-1999 period.

- Turban withdrew from the operations and administration of Amasya, Samsun, Corum, Erciyes, Urfa and Adalya Hotels, Kaleici Marina, Gumuldur and Marmaris Holiday Resort and Beldibi and Belek tourism establishments.

- Tender announcement for the block sale of Abant Hotel, Carlton Hotel's land and a land in Akcay has been published on September 29, 1999. No bids were received for Akcay's land and tender was annulled.

4) Applying market-oriented strategic planning and using strategies according to SWOT Analysis Results: Market-oriented strategic planning is the managerial process of developing and maintaining a feasible fit between the organization's objectives, skills and resources and its changing market opportunities (Kotler, Bowen and Makens, 2006). Strategic planning is a process that make sit possible for the organization to achieve its' pre-stated mission and goals (Kotler and Armstrong, 2001:47). Since word strategy is involved, it deals with long term planning (Evans, Campbell and Stonehouse, 2002). It is obvious that not just in the macro terms, but it micro level strategic plan application is necessary for long term success in changing environmental conditions.

5) Reducing vulnerability in risky situations and constant crisis management efforts: Hotel companies often consider high risk countries for potential investment or operation because as the international hotel industry becomes increasingly competitive, areas become overbuilt and prime locations become scarce or very expensive to develop. Potential profitability, lower development costs and a ready and inexpensive supply of labor. Political risk insurance offers a way for international hotel companies to

lessen their vulnerability. Companies may purchase insurance to reduce the risk from war, civil strike, currency inconvertibility or contract problems. In highly volatile situations, the conventional wisdom is that companies should delegate complete authority and responsibility to the local unit management who is closer to the source of the problem will be more attuned to the realities of the operating environment and be able to make rapid decisions.

As security becomes a measure concern in tourism, it is a common sense to be prepared at crisis at all times though tourism managers are seldom trained or prepared to handle crises resulting from financial, terrorist, medical or political activities. The consequences are (Gee, 1994):

- severe disruption of operations
- increased government intervention or regulations
- compromised public safety
- loss of public goodwill
- financial strain
- unproductive use of management's time
- loss of employee morale and support

Having an ongoing team for crisis management does help to manage the situation at the optimal effectiveness. Thus with continuous teams and preplanned activity lists: in the middle of the crisis (Pirnar, 2005);

- personnel and guest safety, electrical power, ongoing communication and running water are provided
- Media is handled efficiently.
- Careful planning and committed management enables a business to survive and even prosper under the most challenging operating conditions.

6) Global tourism takes into account local differences like culture: Think globally, act locally is the marketing and managing slogan for 1990's. In order to build an integrated network of hotels scattered around the world, comprehensive and appropriate planning and control help hotel managers to view future clearly and do teamwork amongst international staff of the hotel within the chain. Many restaurant and hotel chains apply this strategy, though in transportation undifferentiated global strategies are common.

Hotels operating in the international arena need to have non-rigid

corporate cultures and strategies in order to promote profits, productivity, quality, and guest satisfaction at the unit level. The successful international hotel promotes a company culture that encourages sensitivity to the different expectations and perceptions of its employees and guests (Gee, 1994).

7) E-tourism is widely used in the industry, thus networks are formed among related establishments that increase synergy (Kofteoglu, 2009). Technology has enabled tourism firms with unlimited source and quantity of information lately. Information technology has also provided tourism operations' tools to process data at speed and accuracy that could have not been imagined just a few years ago. Internet and the web-based technologies have increased the speed of accumulation, process and interpretation of data and information, yet increasing all the registration and selling.

To get the highest benefit from today's technology, tourism professionals should have a working knowledge of the system and ways to analyze and interpret. For the information to be useful, information flow, coordination and communication between tourism firms is vital. Although large quantities of data are available, the important thing is helping people use them as an answer to their marketing efforts, solution to their problems or what ever they want it for.

8) Tourism establishments do understand the importance of various travel distribution systems: An important element in the marketing strategy of any hotel is the system of marketing channels through which products and services are sold to their ultimate buyers. The term travel distribution system refers to a series of marketing or selling institutions and how a sells its services to buyers through travel agencies, tour operators, free lines and others. Navigation and GPS technologies are providing endless opportunities to hoteliers and consumers (Kofteoglu, 2008). Today, tourism organizations are virtually using computer reservations systems (CRSs) and this system will allow reservationists to conclude sales more easily and to place guests in the right hotel at the right price anywhere in the world. Some of the CRS are Sabre, Apollo, Galileo, Amadeus, Abacus, etc (Zengin, 2004).

## **Method**

Further a study in lodging is conducted in two important tourism regions in Turkey, namely Izmir and Kuşadası , to figure out the reactions and capabilities of the managers in lodging sector in coping up with the changing

trends. In this study the aim is to figure out how the managers are coping with keeping up with the tourism trends. Since for the strategic performance for the establishment it is necessary to track the trends and serving according to changing needs, the reactions of hotel managers is quite meaningful. In this regard in order to show a sample form Turkey, two important tourism destinations namely, Izmir and Kusadasi are chosen. The subtopics may be stated as,

- The managerial changes that affect the organization
- The role of effectiveness, efficiency and yield management techniques
- Application of CRM and brand loyalty,
- Application of PR and planned media relations
- Application of QM , TQM, HACCP and such quality systems
- Applications of different themes, appealing to different tourism demands
- Application of crisis management tools and techniques
- Application of strategic planning and SWOT Analysis
- Application of E-tourism

The scope of the study includes 12 hotels (4 or 5 stars) from Izmir, Çeşme and Kuşadası. A semi-structured prepared survey of open and closed ended questions was conducted to collect information about the hotels applications to changing trends in the managerial perspective. Since it was conducted in an interview style, the participants were able to add their personal views on the topic which was also taken into account while working on the results. Top management level as department heads and general managers were kindly asked to fill out the questionnaires since they have the full information on applications. The reason for the hotel selection choice is the assumption that they should be the ones that have the need, capability and action to keep up with the changing global trends.

There are some limitations of the study conducted. First one is the area that is chosen since, the study is conducted in Izmir, Çeşme and Kuşadası , and hence the findings related cannot be generalized to Turkish tourism suppliers as a whole. Another limitation of the study is the unwillingness of managers to talk about their managerial in efficiency to keep up with the



trends since that may be understood as being unsuccessful. In addition, the sample consists of only 4 and 5 star hotels, which does not take others into account which may change the findings and the results almost completely. Another limitation of the study is that the sample group belongs to a tourism destination, meaning that if the study is conducted in the area where tourism is not well developed, the findings could have been different, therefore it is not correct to generalize the findings, but suggestions may be helpful for the firms operating in the same conditions.

## **Findings**

- The first question asked was about if the hotel management adjusts to necessary changes and uses flexible structuring accordingly. Only 6 of the respondents mentioned that they are doing necessary adjustments, keeping up with the trends, whereas the other 6 mentioned that due to their central management, they cannot apply any flexibility.

- The second question involved staff motivation techniques and all of the participant hotels mentioned that they do apply motivational-techniques.

- The answer of the third and fourth question reveals that the concepts of effectiveness, efficiency and yield management are especially important, since all participant hotels are working on flexible pricing though 6 of them mentioned that their effort is not enough.

- As the answers to 5-7 marketing questions indicate, all hotels use CRM and brand management.

- Questions 8-10 indicate that though crisis management is found to be very important, only 3 of the hotels do have crisis teams, yet they do not work on the continuous base, rather they meet when there is an urgent situation. In addition only 2 of them are planning professional media relations.

- Answers to questions 11-14 indicate that, though quality management is found to be important, hotels do use their own quality systems in the management contract or franchise system they belong to.

- Answers to question 15-18 indicate that all hotels use planning and 10 does SWOT analysis.

- Coping with trends means improving the hotel facilities accordingly and 11 of them are using theme animations, 5 of them are giving emphasis to spa and fitness activities and also convention tourists. Again, 8 of them

are trying to appeal to business tourism with special product and services. In addition, most of them could not supply special travel packages like eco-tours and cultural tours of the area, though their guests increasingly demand for such specialized products.

- The last set of questions related to e-tourism and internet usage. All of the hotels interviewed have their own web pages and applying e-tourism. The percentages differ in registration processes from 10% to 50%.

## Results

Table below indicates the results of the findings from the study

Table 3 - Managerial Responses of Izmir and Kusadasi Hotels to Changing Tourism Trends

Managerial Responses to Trends	N=12 Hotels	%
Flexible management styles and organization	6	50
Application of motivational factors	12	100
Managerial importance given to issues like; effectiveness, efficiency and yield management techniques	6	50
Application of CRM and brand loyalty	12	100
Application of professional crisis management	3	25
Application of planned media relations	2	17
Application of QM	12	100
HACCP	4	33
Waste management, ISO14000	2 (some app)	17
Application of strategic planning	12	100
Having alternative plans and application of flexible planning	12	100
SWOT Analysis	10	83
Applications of different themes and tourism types	11	91
Application of E-tourism	12	100

## Discussion

The findings indicate that adjusting to necessary changes and using flexible structuring accordingly is not very common in hospitality. There are still many hotels which do not use flexible organization charts and systems which rely on rigid central management which are slow to react to rapid changes. The same goes with managerial importance given to issues like; effectiveness, efficiency and yield management techniques which are the crucial profit maximization methods that all hotels should be using especially in this period of global crisis. Especially some hotels were complaining about

their very low occupancy rates and stated that their efforts in this area is not useful and enough. The most important areas to work on were stated as profit maximization and yield management. All respondents seem to be sensitive to application of motivational strategies and staff satisfaction, quality management programs in general and e-tourism in general, though when analyzed in detail, though all of them seem to apply it there are many variations among them. The results of open ended questions indicate that there are still many issues that hotel managers should consider like they all seem to use e-tourism for reservations but the actual purchase is not done by e-trade due to security reasons. The main complaints in this topic were stated as the lack of qualified personnel, the updating problems and technical problems involved.

Though quality management is found to be important, hotels do use their own quality systems in the management contract or franchise system they belong to. Among the ISO group only HACCP is used in 4 hotels in F & B departments. The environment sub-quality group seemed to be the most neglected one, since no participant was applying waste management in a professional manner. Sustainability seems to be the part where all hotels are having problems in. Coping with trends means improving the hotel facilities accordingly and many of them are trying to keep up with this trend with different services and themes. One of the managers' answer was "If we want to be in the market 10 years from now, we have to change as the market changes. Some of the new products coming up from meeting the emerging trends were stated as: health and wellness tourism, convention tourism and eco-tourism".

Responses show that all hotels use planning but they have flexible plans because all of them believe that the political and economic conditions in Turkey are very fragile and volatile, therefore they mentioned that they do not believe in very rigid strategic plans, though all of them are working on them. Also, none of them apply SWOT from top to bottom, yet 10 of them worked on their own properties' strengths and weaknesses and had completed competitive analysis. Although they seem to apply strategic planning, they are not open to environmental threats and opportunities, which make them very vulnerable to changes.

The responses about marketing techniques indicate that all hotels use

CRM, but they are not good at co-branding at all. In branding aspects, franchise hotels use the advantage of already established brand name but except from one of them, they mentioned that they are not applying extra effort to the concept. In the others, only top management deals with crisis situations. Crisis management and professional media relations seem to be the areas where improvement is needed.

This field study is conducted in a well developed tourism region and since the participant hotels do have the necessary resources to adapt for changing trends, the results should not be generalized for the whole. Though the hotels are chosen from a group that was expected to keep up with the trends, quality management and also appealing to different tourist groups with different various tourism needs.

## **Conclusion**

Any hotel that wants to keep the market share it has yet alone increase it has to keep up with the trends both in demand and supply sides of the industry. In order to stand out from the crowd of severe competition, following up the trends in both supply and demand sides play an important role. Among the changing management and marketing techniques according to changing trends are; applying flexible marketing techniques, applying strategic policies, focusing on effectiveness and yield management. Tourism firms try to meet the needs of changing demand by applying CRM, e-tourism, data mining, PR, crisis management and having positive media relationships.

Hotel managers need to develop strategies to handle crises situation and specific guidelines for crises management to minimize the human injury, and property loss. Strategic plans for media management during a crises situation should also be enhanced.

Although hotels will increasingly have to employ extensive branding and marketing strategies, it seem in reality the emphasis is on CRM and customer satisfaction whereas brand loyalty is only kept to the franchise organizations with already established well known brands. Regarding this concept, co-branding is not utilized at all. With advances in co-branding, hotel customers obtain an assurance of quality. In this ways, hotels can provide a standard and consistent pricing and services to its customers.

Besides, future trends in environment and waste management will deter

the high rate of construction development for hotels. Certain environmental regulations will be required for all hotel managers. Thus, to gain competitive advantage, hotel managers should adopt up-to-date environmental trends, policies and legislations. "Self-regulatory" (Gee, 1994) guidelines can be prepared to enhance the hotel's environmental sensitivity. The wastes can be recycled or the amount of waste can be decreased. The water waste can be minimized. Energy can be conserved in the hotel. In short, the hotel managers can incorporate environmental sensitivity to their corporate culture. In following years, demands for online services of hotels will sharply increase since more and more customers prefer electronic services specifically in hotel selection (Ivey, 2006). Online reservations will increase and almost all tourism organizations will utilize internet services. In order to catch these trends, internet facilities of the hotel should be enhanced with more qualified personnel by handling problems on software and hardware of computer, and internet connections.

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## **Appendix**

### **Interview Questions Used in The Interview**

1. Are you adjusting to the necessary managerial changes and use flexible structuring accordingly?.
2. Are you applying staff motivation techniques?
3. Are you using profit maximization and cost minimization techniques?
4. Name the methods and concepts that your hotel is using \_\_\_\_\_
5. Do you apply new marketing techniques like CRM?
6. Do you value customer loyalty? Explain.
7. Do you give importance to branding/co-branding
8. Is crisis management important?
9. Do you have special crisis management teams on the continuous period?
10. Are you planning and using professional media relations?
11. Do you believe in quality management ?
12. How is your hotel responding to this need?
13. Do you apply HACCP ?
14. Do you apply waste management in a professional manner.? How are you with sustainable tourism?
15. Do you apply strategic planning?
16. How is it done? Please describe the process and contents?
17. Do you use flexible planning / alternative plans?
18. How do you apply SWOT analysis?
19. How do you cope with requests for different tourism services and trends?
20. Do you apply e-tourism?
21. Which areas are you more successful with (e.g. reservations, registration, selling, complaint management etc.)?
22. State your main complaints in e-tourism.

# Opportunities and Challenges in Applying the Concept of 'Mass-Customisation' to the Diversified Tourist Image of Egypt: The Supply Sector Perspective.

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**Abstract :** This paper examines the concept of mass-customisation from the tourism supply sector viewpoint. Although, mass customisation is a well identified concept as far as marketing of goods is concerned, it is still considered a less tapped concept in the field of services, particularly in the tourism sector. Hence, this paper is trying to redress this shortfall through examining how the concept of mass customisation could be applied to the new diversified tourist image of Egypt. Two sets of semi-structured in-depth interviews were conducted with key informants from the public and private tourism sectors in Egypt. Key findings emerged from these interviews revealed the opportunities and challenges of applying mass customisation in Egypt. Enhancing the competitive position of Egypt, increasing the tourist numbers and augmenting the sales for specialised tourist aspects represented key opportunities for mass customisation in Egypt. Whereas, limited segmentation strategies, financial constraints, as well as limited statistical information on the different tourist segments were major challenges for operationalising mass customisation in the destination. The paper finally suggest that the exchange of experience and managerial knowledge between the public and private tourism sectors in Egypt from one side; as well as with the international tourism trade, from the other side; through undertaking joint marketing and segmentation studies should be a core criterion for the successful application of mass customisation.

**Key words:** mass-customisation, personalisation, niche markets, image diversification, supply sector.

## Introduction

Mass customisation is a new strategy for market segmentation (Pine, 1993). It is also called one-to-one marketing (Peppers and Rogers, 1993). This strategic approach requires tailoring the product differently for each and every customer while retaining the principles of mass production. The new trend in this approach lies in its ability to tailor a product to fit the



desires of consumers one by one yet do it in a mass production facility.

Other writers call mass customisation "finer segmentation" (Davis, 1996; Kara and Kaynak, 1997). This new concept sees each customer as a segment and treats each customer separately by fulfilling his/her unique needs and desires (Wiggins, 1995; Pine et al., 1995). As such, the concept of mass customisation can be defined according to Davis (1996: 177) as:

**Mass customisation of markets means that the same large number of customers can be reached as in the mass market of the industrial economy, and simultaneously they can be treated individually as in the customised markets of pre-industrial economies... the ultimate logic of ever-finer differentiation of the market is markets of one, that is meeting the tailored needs of individual customers and doing so on a mass- basis.**

Moreover, it is argued that the main reason for implementing mass customisation is due to the demand fragmentation in the market for goods. It is also argued that niche markets are becoming markets where power has shifted to buyers who demand higher quality goods that closely match their individual needs (Pine, 1993).

Mass customisation has also identified the dimensions along which customers differ in their needs rather focusing on homogenous market segments (Gilmore and Pine, 1997). Hence, the aim of mass customisation is to produce the exact products required by its targeted customers.

In the context of tourist destinations, mass customisation means the production and sale of large amounts of tailor-made services that will allow producers to supply flexible travel and tourism services so as to meet the demand of the new customers. Another advantage of mass customisation to tourist destinations is that it will allow producers to supply travel and related services at prices that are competitive with mass tourism services (Poon, 1997). Accordingly, the main focus of this research paper is to examine how the mass customisation concept can be applied to the new diversified tourist image of Egypt. This diversified image offers a product-mix that was designed primarily in order to satisfy multiple needs of each individual consumer. Hence this image has been augmented so as to offer

various tourist product(s) to its targeted segments in order to broaden the demand for other tourism services rather than focusing solely on its original cultural product.

The Egyptian public sector Authorities who were in charge of planning and implementing the diversification policy of the tourist product of Egypt were aiming in attracting an additional segment(s) of tourists to the destination- chief among them is the beach segment- in addition to its well established cultural niche market. Nonetheless, the steps or methods of implementation of this policy were not documented that would enable them to properly assess their intended targets. Hence, this research paper is mainly aiming at:

- Showing the salient elements of mass customisation when applied on destination images.
- Examining to what extent the elements of mass-customisation could be applied by the Egyptian public and private tourism sectors when promoting the new diversified tourist image of Egypt.
- Identifying the opportunities and challenges of mass-customising the new tourist image of Egypt.

The next section delineates the different elements and concepts of mass customisation and its interconnectedness with the tourist product. The following part explains the methodological approach employed by the researcher to identify the key obstacles that face the successful application of mass customisation in Egypt, as well as the possible opportunities that will facilitate its application. The major findings emerged from the interviews conducted with the key officials in the public and private tourism sectors in Egypt are listed in the subsequent part. The last section shows the conclusions and recommendations regarding the best practices suggested by the researcher for the successful application of mass customisation to the diversified tourist image of Egypt.

## **Types of Mass Customisation**

Gilmore and Pine (1997) suggested four different approaches to achieve mass customisation. The first approach is called collaborative customisers.

This one involves a dialog with individual consumers; the aim of which is to discover their unique wants and needs, after which a customised product is created for them. The second approach is called adaptive customisers. This type offers a standard product that can be modified to some extent by its users. Cosmetic customisers is the third approach of mass customisation. It advocates for a standard product that is marketed differently to different customers. The final approach stands for transparent customisers. This approach provides individual customers with unique products without informing them that they have been customised for them. However, these approaches are designed for the marketing of goods rather than services. In the case of mass customisation services like the tourism services; special arrangements should be made in order to suit the nature of the tourist product. The following section discusses this idea in more details.

## **Mass Customisation And the Tourism Product**

It has been argued that the basic premise of mass customisation is that customers can get the product exactly as they wanted. This can be done by eliminating unwanted attributes and hence not having to pay for them. Thus the ability of providing the exact product is deemed to be the major strength of mass customisation (Bardakci and Whitelock., 2004). In the case of the tourist product, it could be tailored by combining the requested needs of each individual customer or group of homogenous segments in the targeted market. For example, in the case of Egypt, it is currently offering a range of products within its new diversified image. The principal goal of diversifying its tourist image was to augment its product so as to appeal to as many tourist segments in its targeted markets. Hence it could be argued that the concept of mass customisation when applied to the case of Egypt could help the marketers to tailor this new diversified image by selecting certain attributes within a single product such as culture or beach products that could satisfy certain segments in their targeted markets. Consequently, the main problem of this current paper is to examine to what extent the marketers of the new diversified image of Egypt are capable of reselling the new image of the destination by including the mass customisation concept to their current marketing strategies.

## **Mass customisation or personalisation: is there a big difference?**

Personalisation is perceived as a more comprehensive concept than mass customisation. This is due to the fact that it involves tailoring any or all aspects of the marketing strategy for each consumer (Goldsmith and Freiden, 2004). These strategic decisions could involve particular promotional activities such as advertising, distribution, pricing, as well as the product (Ibid.). Further, Goldsmith (1999) describes the evolution of the marketing strategy from the 4Ps associated with goods (product, promotion, price and place) to the 7Ps associated with services. Hence, he suggested that another strategic P will be added; that is personalisation. This new component will bring the marketing mix into the twenty first century by incorporating database marketing, relationship marketing and mass customisation (Pitta, 1998).

Moreover, it has been argued that personalisation is considered to be an important element in the overall marketing strategy. Thus, it should be addressed in conjunction with product development and as such decisions concerning the nature and degree of personalisation should help guide product development. In this context, managers undertaking product development should build into it the degree of personalisation they intend to offer to their targeted market. This policy could influence the way the product is manufactured through mass customisation (Anderson et al., 1997; Kelly, 1996; Oleson, 1998; Pine, 1993). In the context of tourist destinations, personalisation entails tourist planners and tourist promoters, to identify the important attributes in the image they project in their targeted markets based on individualised needs of their targeted customers. Hence, a regular follow up with the different segments in their intended markets through detailed consumer surveys will enable them to design the image that satisfy their potential customers' needs and expectations.

Another important feature of personalisation is that a firm that attempts to apply it could take its expertise in a personalised product in one category and expand into a new product category keeping the same brand name, but benefiting from the good reputation it has in its original category (Goldsmith, 1999). In the context of the case study of this research paper, tourist promoters of the new diversified image of Egypt has benefited from this

feature when they first projected the destination image by using the strong cultural attribute of the original image of the country in order to help selling the new product(s) that have been added to this attribute; chiefly among them is the beach product. This process of diversification was first initiated by the Egyptian public sector (the Egyptian development Authority) through the developmental scheme of beach tourism in the coastal areas of the Red Sea and South Sinai as early as 1982. Its intent was to spread tourism more evenly throughout the country. Accordingly the overseas tourist offices launched an advertising campaign bearing the slogan; 'Egypt is not only monuments' in an effort to shift visitors' attention to resort tourism over the Red Sea and South Sinai, and at the same time keeping the word monuments as the cultural product is the major attribute of the overall image of Egypt. (Moussa, 1993). Accordingly, the degree of personalisation or mass-customisation in the case of Egypt depends on the extent to which the Egyptian Tourist Authority has succeeded in offering a diversified destination image that offer a multiple product, so as to suit the individual needs of its targeted segments. However, the challenge of this approach lies in its ability to promote and sell these individual or tailor made products to larger segments of clients. The next section will discuss these concerns through employing a methodological approach that will aid the researcher in identifying the key threats as well as opportunities in applying the concept of mass customisation to the diversified tourist image of Egypt.

## **Methodology**

The methodological framework of this paper was purely qualitative in nature. It was comprised of five semi-structured in-depth interviews with key responsible in the private and public tourism sectors in Egypt. The interviewing technique was selected in this paper in order to gain a thorough understanding from the private and public tourism stakeholders in Egypt on the possibilities of applying the concept of mass customisation to the diversified tourist product of the destination abroad. The interview method is also perceived as a tool that gives greater depth than other research techniques (Burgess, 1982). Further, the face to face interviewing method helped the researcher to gain an explanation of the different issues raised by the respondents. She was commonly able to get their cooperation, thereby

helping improve not only the volume of the data gathered, but also its trustworthiness or plausibility (Adams and Schvaneveldt, 1991).

A total of four in-depth interviews were conducted with four tourist professionals who are employed in two multi national tourism companies in Egypt. The planning manager and marketing director were selected from the first company; whereas the director of the Central Operation's Support department and the marketing director for Egypt were interviewed from the second company. The selection criteria of those key participant informants was based on their positions as seniors in two of the international tour operating companies in Egypt and as such, they adopt the major operational and marketing system of their mother companies abroad with the exception of some internal modifications which they alter in order to suit the Egyptian tourist product.

The second category of informants selected for this study represented a key official from the public sector. He was occupying a senior position as the general manager of Tourist Relations in the international tourism sector in the Egyptian Tourism Authority. This Authority represents the major official organisation for the promotion of the tourist image of Egypt in its generating tourism markets. The selection of this responsible was due to his post as he was a key information source for the devising and implementation of the major advertising campaign of Egypt in its tourist generating markets. Thus, the researcher was able to gather data from him concerning the policies adopted by the ETA regarding the Egyptian campaign and thus discussing the possibilities of mass customising the image of Egypt through this campaign.

A questionnaire was developed with selected key themes pertaining to the major research objectives mentioned in the first section of this paper. Two questionnaire designs were prepared for each category of key informants selected for this study. Questions designed for the first category of international tour operators were covering themes related to the tourist image of Egypt that is currently projected by those tour operators abroad; the market research undertaken by those tour operators in order to understand the attitudes and perceptions of targeted segments in their markets of origin; segmentation strategies for the new diversified image of Egypt; the

competitive advantage of the Egyptian product over other destinations if those operators will apply mass customisation strategies to the new image of Egypt; the possible venues of cooperation with the public sector if mass customisation became a plausible strategy to be applied to the new diversified tourist image of Egypt and the strengths and weaknesses that could emerge as a result of the application of mass customisation to the new image of the destination.

The second questionnaire designed for the public sector informant comprised some analytical key themes such as the projection of the Egyptian image in its major advertising campaign abroad; who is responsible for the planning of this campaign in terms of its design and assessment; who is conducting the market research that help in feeding and directing the advertising campaign; what is the framework of the promotion strategies adopted by the ETA in its tourist generating markets overseas and the last theme was discussing the segmentation strategies adopted by the ETA in its advertising campaign and how it could be harnessed to apply mass customisation for the Egyptian product abroad.

The main aim of conducting these interviews with those key informants was to gather data through a highly interactive analytical approach. Their views and thoughts of the feasibility of applying the concept of mass customisation to the new diversified tourist image of Egypt constituted a reliable information base for this investigation due to their long experience in marketing the Egyptian tourism product overseas. The duration of each interview used for this study ranged between 45 and one and half hour. All the interviews were tape recorded (after gaining the interviewees' consent), transcribed and translated with the exception of one interview that was not translated as the interviewee was from the foreign workforce in one of the selected companies.

The researcher used thematic analysis to analyse the data produced by the different respondents interviewed in this study. These were divided according to the topics discussed in each interview. Similar topics were grouped together and emergent themes (Veal, 2006) out of these topics were selected. These themes were chosen due to their importance in terms of their analytical implications and relevance to the major study objectives.

The researcher were guided by each objective in this study in order to select the themes related to this objective and hence, extracting it from the cluster of data, putting it aside and then collecting all similar themes so as to compare them. Comparisons between similar themes helped the researcher in pulling off the major results of this study. The themes were presented in the form of verbatim (transcripts) of what was mentioned by the different respondents on each of the topics discussed during the course of the interviews. This technique of qualitative data analysis was used in order to mirror the feelings and reflections of each respondent, hence giving more depth into the analysis. The next section shows a detailed description of the analysis of the interviews used in this study together with its results.

## **Study Findings**

The key themes presented in the questionnaire of this study were covering the three major objectives stated in the first section of this paper. Accordingly, the findings of this study will be elicited out of the answers provided by the selected key informants interviewed by the researcher on these major themes. The following section will list each of these objectives followed by the key findings pertinent to it.

***Objective One: identifying the salient elements of mass customisation when applied on destination images.***

The key findings elicited out of the themes related to this objective are as follows:

**Finding One: Very Diluted Promotional Message for the Image of Egypt Abroad.**

One of the key informants in this study declared that the projection of the image of Egypt abroad via its major promotional campaign executed by the ETA displays a very diluted image for the image of the destination. He expressed his opinion in the following quote:

**When I would look at or see the ETA commercials on TV, what I am exposed to as a consumer? Or when I look at the website or whatever, I always get the feeling that they are basically trying to appeal to everybody. The message is very diluted. Its like we have beaches, we have horses, we have camels, we have pyramids, we have safaris. There is nothing we don't have. So come on down and enjoy everything we have...**



The respondent in the previous excerpt shows that the planning of the new diversified image of Egypt is not targeting a particular segment of customers. Rather it is trying to display a multiple product that caters for different consumer needs. It is as if there is no segmentation of this new image done by the ETA. The promotional message is trying to attract the largest number of customers on the expense of targeting a particular segment or segments as the aforementioned quotation reflects. The same respondent accentuated his opinion in another instance:

**In the promotion campaign of Egypt, I see girls riding horses on the beach and then pyramids and one minute someone jumping into a pool and then someone swinging a golf club... I definitely do appreciate that we have an enormous amount of tourist products to offer, perhaps more than other countries, but at sometimes wonder whether or not it's just becomes a bit too much for a tourist to digest...**

The absence of a clear specialised campaign for the new tourist image of Egypt is what the above quote trying to echo. The key informant seems not in favour of an all encompassing promotional campaign for the new diversified image of Egypt without undertaking proper segmentation strategies for this image. He was trying to convey to the researcher that the ETA instead of showing everything related to the new product-mix of Egypt in a single campaign, should rather trying to concentrate its efforts in targeting a particular segment of tourists via displaying a single product like the beach product or the cultural product in its major promotional campaign and making the other products as subsidiary products for Egypt for other tourist segments. To cross analyse the opinion of this key informant, the researcher looked at the content of the major promotion campaign of Egypt that is currently broadcasts in the tourist generating markets of the destination. The analysis of this campaign is illustrated in the following section.

## **The Promotion Campaign of Egypt**

### **Description:**

The international advertising campaign of Egypt featured in its major

tourist generating markets was bearing the slogan *"Nothing Compares to Egypt"*. Its main promotional message was Egypt has it all. For example it shows most of the tourism products that the destination currently offers with the main cultural product dominating the scene as it was the sole tourist product of the country for almost two hundred years. Instances of it in the ad was represented in views of the Nile, the temple of Abu-Simbel in Aswan, smiling locals and waiters catering to tourists on Nile cruises, feluccas on the Nile and Camels touring the desert of Egypt. The ad then turns to show some tourists playing Golf while enjoying the sun, then a big scene of the Red sea with children playing football on the beach followed by some nice fishes swimming under water. The ad then shows some tourists walking in a row in the desert in a safari tour. Then the Egyptian countryside was depicted with its green fields, the ad particularly was spotting one of the locals picking an orange fruit and handing it to a tourist. Then the Egyptian bazaars were shown at night with tourists touring inside it and finally the citadel and sound and light shows illustrated the main tourist attractions in Cairo.

## **Analysis**

As described above, the ETA in its planning of the major advertising campaign of Egypt was trying to appeal to many tourist segments. The advertising campaign shows many tourism products that Egypt is offering. These products are culture tourism, golf tourism, recreation tourism, safari/desert tourism. This accentuates what the key informant was expressing in the preceding quotations that the ETA is trying to make Egypt appeals to many tourism segments without focusing on a particular segment and planning a specialised campaign for it. In the context of the main research problem of this paper which is the viability of mass customising the new tourist product of Egypt, the current approach of the ETA for showing all the attributes of its tourist product will not work. This is due to the fact that the concept of mass customisation stands for the finer segmentation of a single tourist product. This means that the ETA should think about segmenting each of its tourist products by creating new uses for this product and hence maximizing the opportunities of selling this modified product to more tourists. As argued in the first section of this paper that mass customisation within

the context of the tourist products means the production and sale of large amounts of tailor-made services that will allow producers to supply flexible travel and tourism services so as to meet the demand of the new customers(Poon, 1997). Therefore, the issue of segmenting each tourist product is a core element when planning for mass customising tourist products. This issue is further debated in the following section.

### **Finding Two: More Segmentation Strategies needed for the Egyptian Tourist Product-Mix**

All the informants in this study agreed on the shortage of segmentation strategies undertaken by the ETA for promoting the new diversified image of Egypt. One of these informants expressed his opinion in this issue:

**What the ETA is actually doing is that displaying the image of Egypt in its advertising campaign. This ad was offering you a cruise or doing activity on the beach or doing some horse riding. The question now is when I first come and show this advert with these different aspects of tourism; did I really know who exactly I am selling these products to?? Or know who is interested in these aspects of tourism that I am intending to show in my campaign and started to do proper segmentation to target these new segments before conducting my campaign? The answer actually is No. what actually the ETA did was that they displayed an advert without targeting a particular segment and that's it. This ends in showing a vague image of Egypt; by which they connected the image of Egypt with the pyramids, the Nile, the beaches and that's it.**

This informant agreed with the previous one on the absence of proper segmentation strategies undertaken by the ETA for the new product-mix of Egypt. The new image of Egypt is shown multiple tourist products which although look attractive, but at the same time they seem raw or not efficiently worked on as far as segmentation strategies are concerned. In this concern, Seaton and Woodward (2007:22) suggest that:

**The typical pattern is for NTOs to inventory the tourist segments they are targeting, assert their attractiveness in terms of their numbers, financial potential and growth possibilities, and then indicate the marketing and promotional activities that will be directed to**

**influence and stimulate the segments.**

This means that the typical pattern of NTO promotional framework is to study the tourist segments they plan to target before planning their promotional campaigns. This should be done via conducting detailed market researches in each of its tourist generating markets so as to possess a vivid and to some extent a reliable picture on what these segments really want in order to tailor make their products to fit with the exact desires and needs of these particular segments. Pike (2008) endorse this opinion when he argued that segmentation can be undertaken by a priori means where the criterion variable for dividing the market is already known. This means that the NTOs generally should understand the needs and wants of their target segments, and hence be more capable of targeting them via proper means of promotion which should be the base of planning their promotional campaigns. In this context Seaton and Woodward (2007:26) added:

**Perhaps most importantly, all 'segmentation-based' NTOs claim to target their chosen segments in their promotional materials. In other words, they are taking segmentation seriously and developing focused campaigns/strategies rather than relying on 'generic' campaigns in the hope that their chosen segments will respond to broad-brush messages about their destinations.**

Hence, it could be understood from the aforementioned quotes that any NTO before embarking on its promotional campaign should have an in-depth understanding of the detailed needs of their target segments in their tourism generating markets. Hence be in a much better position to target them efficiently and effectively. However in the case of Egypt, this seems to be missing from the ETA agenda at the present time as claimed by the respondents of this research paper. Therefore, if there is no proper segmentation strategies undertaken by the ETA for the new tourist image of Egypt, the possibility of doing finer segmentation to achieve mass customisation; that is not only segmenting the overall image of the destination, but also doing a further step of undertaking more segmentation within each single product of Egypt would be remote at this current stage.

The methodology of implementing segmentation strategies is to conduct market studies on each of the major generating markets of Egypt as referred to earlier to understand the needs of the different target markets from one

side, as well as to get a more informed picture on other competitive destinations that compete with Egypt from the other side. One of the informants interviewed in this study proposed some of the ways that should be adopted by the ETA staff to help them understand the ever changing needs of their target tourists in a fiercely competitive industry like the tourism industry, and hence be in a better position to mass customise the new tourist product of Egypt. This issue is discussed in details in the following section.

### **Finding Three: The Importance of Conducting Detailed Market Research for the New tourist Image of Egypt.**

To be able to position the current tourist image of Egypt in the international tourism market, the ETA ought to research the needs of its target groups via conducting market studies. This will enable her to better understand these needs, thus be capable of positioning Egypt among other competitive destinations that offer similar tourist products. An informant in this study expressed his views on this issue when he declared:

**If I am in charge of promoting Egypt in the ETA, I would say: ok, let me go and inspect the destinations which my target groups have selected. Let me watch very carefully what these people are doing? How they spend their time? What really matter to them? Interview them in the resort like sit on the beach and say to them; why did you come here and not go to Egypt? I think you would find remarkable answers... But you see I think what happens is again it gets right back down to we kind of know best or we don't need to go that deep. Hence, what I see is that Egypt isolated itself from the world of tourism and we were just trying to target this group of people that we don't really know much about when it comes to selection of holidays. We think the fact that we have everything is enough.**

The respondent in the aforementioned quote do not see that the Egyptian Authorities are doing enough in so far as the consumer profiles and needs are concerned. In his view these new consumers need to be carefully studied by the ETA staff in order to be able to understand what they need and therefore be more capable to target them with the appropriate tools. In this concern, Seaton and Woodward (2007) noted that primary research data is

collected by NTOs through a range of methodologies. Those which were used frequently included focus groups, telephone/questionnaire surveys, visitor satisfaction surveys, hotel occupancy studies and in-depth interviews. They added that other supplementary techniques mentioned by NTOs include desk research, mind mapping, unobtrusive observation, scenario planning, data mining, special interest media research, Tourism Satellite Accounts analysis, economic impact studies, tour operator information, Foreign Office research, customer feedback/complaints, brand and advertising tracking surveys, tourism barometers and perceptual mapping.

Accordingly, there is a wide array of methodologies adopted by the NTOs worldwide that enable it to gauge the actual needs and profiles of their targeted groups. In the case of Egypt, the researcher has obtained some documents of a research project sponsored by the Egyptian Tourism Economic Committee which commissioned a market research group in the UK. This group conducted a three phase research project that was designed primarily to guide strategy and message development of promoting tourism in Egypt. The first phase of this project was giving a background review of secondary, publicly available data on tourism trend around the world. Whereas, the second phase consisted of focus groups in a variety of target markets of Egypt like Germany, Russia, France, Italy, The Unites States, Unites Arab Emirates and the Kingdom of Saudi Arabia. Themes discussed in these focus groups included issues related to top of mind views of Egypt, positive and negative images of Egypt, most important factors in deciding to go on holiday to Egypt, satisfaction with experience in Egypt, Egypt's main attractions and what Egypt could do to encourage tourists to visit it. The third and last phase consisted of telephone surveys of leisure travellers, business travellers, as well as travel professionals in Europe, Russia and the Middle East. However, it was not clear how the results shown in those three phase research project were reflected in the promotional strategy of Egypt devised by the ETA. This topic will be discussed further with the themes related to the second objective of this study.

#### **Finding Four: The need for a reliable statistical base for tourism trends in Egypt**

The same respondent also highlighted a very important factor that should be carefully thought about if the ETA wants to mass customise its new

tourist product. This is the need for the existence of a reliable statistical information base that encompass the exact numbers and expenditure patterns of the different tourist segments and nationalities that visit Egypt annually. In this respect he said:

**This is where Egypt has to actually have accurate statistics. This is because without having accurate statistics, she will not be able to pattern her success or failure and you won't be able to motivate yourself when you have the appropriate success. So you've got to have systems in place from the beginning. So again I think what's happening now is a waste of energy and money. It's just like shooting in the dark.**

The key informant stressed the importance of having a good statistical base in order to measure and hence be able to evaluate the promotional effort undertaken by the ETA. For example, if the ETA wants to mass customise its beach product. This mission will be really a very hard task without the presence of reliable statistical information that could provide it with exact numbers of tourists who have visited the beaches over a number of years and what activities did they perform or services they wish to have during their visits. However, it seems that Egypt is not the only country that suffers from a lack of robust statistical base for its inbound tourism trends as Seaton and Woodward (2007) noted while collecting data from a number of NTOs worldwide:

**International tourism statistics vary tremendously, in terms of their reliability, depending upon their source. Some countries have extremely robust 'inbound' and 'outbound' tourist figures based on large sample border surveys while others do with ad hoc and/or statistically inferior surveys. Some countries make details of their tourism statistics publicly available while others treat them as confidential.**

Accordingly, the issue of having a reliable statistical base for tourism activities in a country depends mainly on a number of factors. Among them are the existence of good financial resources that can help in conducting the numerous and complicated surveys needed for the compilation of these statistics. Another factor which determines the existence of a reliable

statistical base in a destination is the presence of trained human resources who can operationalise a well developed statistical database based on scientific criteria and studied methodological framework. The issue of the level of professionalism of the local workforce in the tourism sector in Egypt is discussed further in the following part.

**Finding Five: The level of professionalism needed to mass customise the new tourist product of Egypt**

Another very important issue raised by one of the key informants of this study. That is the level of professionalism needed either from the public or private tourism sectors to mass customise the tourist product of Egypt. The problems highlighted in the previous section were about the strategies and methodologies needed that will help the ETA to plan and implement mass customisation effectively and efficiently in Egypt. However, the pendulum turns now to the human resources who should be in charge of this process. The question now is: Are they prepared to execute these strategies at this current stage? This means that if the segmentation strategies and the market surveys do exist; who is going to implement them? Or to put it clearly who is qualified to understand the mechanism of these studies and thus is able to operationalise them in a professional way. The opinion of the key informant on this issue is expressed in the following excerpt:

**The future of Egypt's tourism is greatly sitting in the hands of not just tour operators but people. People with all different motives in life and in a minute I have seen somebody comes up with a new strategy for Egypt or another destination and the whole fail; it just changes overnight. So unless we are actually interfacing with these European tour operators, not just at the level of selling components to them, but participating in packaging the components together with a strategy if it is going to be mass customisation; if that's a strategy and getting them to understand and we both are working together but they (foreign tour operators) will not listen to us if we arrive at the table with no level of intelligence.**

The key informant above was wondering on the possibility of the local human workforce in the tourism sector in Egypt to implement mass customisation. he views that the Egyptian tour operators sell only components



of the tourist product of Egypt. This is represented in hotel rooms, excursions, transportation, etc. while the foreign operator take these parts and package them together and finally sell them to his clients. It seems as if there is no ingenuity among the local operators in the selling and packaging of these trips. In other words, the whole selling process of the Egyptian tourist product is not guided by a strategy that clearly identifies the different components of the tour package, how it is going to be sold, to whom and for how much? If the destination wanted to go for mass customisation; which advocates for more in-depth segmentation into each of its tourist products like the cultural product or the beach product. Hence, it should be guided by an informed strategy that can identifies the add-on services that should be supplemented with each of these products and to whom it is going to be sold or who is going to benefit most from them. However, according to the respondent he couldn't see that this is happening at this current stage, as long as the foreign operator still has the final say about the success or failure of the Egyptian tourist product abroad.

In summary, the previous section delineated and discussed the salient elements that should be existed if the ETA wants to apply mass customisation successfully in Egypt from the viewpoint of some tourist professionals in the destination. Four major elements raised by the above key informants; these are:

First: effective segmentation strategies for the new tourist product of Egypt;

Second: the necessity of conducting market studies in the different generating tourist markets of the country;

Third: the level of professionalism that should be available for the successful implementation of mass customisation in Egypt; and

Fourth: The importance of having reliable statistical base for inbound tourism.

The next part shows the important themes raised by the interviewed respondents that are pertinent to the above elements and hence constitute the key findings of the second objective in this paper.

**Objective Two: Examining to what extent the elements of mass-**

**customisation could be applied by the Egyptian public and private tourism sectors when promoting the new diversified tourist image of Egypt.**

When the researcher was discussing further the previous elements which represent the core elements of mass-customisation if it is going to be successfully implemented in the destination with her two categories of key informants from the public and private tourism sectors in Egypt, they came up with the following findings.

First: Regarding the segmentation strategies that should be adopted by the ETA if they are planning for mass customising the Egyptian tourist product. The public sector respondent interviewed in this study mentioned:

**We actually adopt a new trend in marketing now which is the e-marketing or marketing via the Internet. We have an Internet site now dedicated for this process. In this site you will find so many links that give you information about everything in Egypt. You can actually organise your whole trip to Egypt via this site. We also made additional units to complement this website. For example, we designed a unit for diving; another one for wellness tourism; a third one for desert tourism. This is our new trend in promotion; where we can segment our tourism product into many sub products like we created units for conference tourism, businessmen tourism, diving tourism, desert tourism, wellness tourism, etc..**

The respondent in the above quote gave a very general description of the segmentation strategy or trend as he called it in the promotion policy of the destination. In his opinion the segmentation policy which the country adopts now is mainly confined into adding more tourist products like conference tourism, diving, desert tourism, etc. into the main cultural product of Egypt. this takes the form of providing the potential tourist with information on how to book for it and how much that will cost and so on. However, he didn't give the researcher any idea about if there is a specific strategy adopted or implemented for segmenting the new tourist product of Egypt. Instances of this could be how do they select their target groups? In other words, what are their selection criteria for these new groups? Is it their level of income, age, general interests, etc..

By cross-analysing what the previous respondent has said with the tourist professionals interviewed in this study, they came up with the following themes.

**Finding One: The ETA should plan for a single campaign for each tourism product**

One of the private sector respondents gave the researcher a very good example on how the ETA should go about mass customising its tourism products. From his experience in working as an international travel professional for almost 20 years, as well as working in Egypt for about 10 years. he expressed to the researcher his personal professional view if he is in charge of planning the advertising campaign of the ETA. He said that he would have opted to go for a special campaign for a single product like the conference product if he wanted to position the new image of Egypt in the international tourism market. His opinion is reflected in the following quotation.

**The advertising campaign conducted by the ETA now actually looks like where the famous saying: "a jack of all trades master of none". I am not saying that this is the case but I am thinking that for example, incentive and conference travel. What I believe is that Egypt has enormous potential for that. There was a big ad for this type of tourism published in a trade magazine in Europe since 8 or 9 years ago; where they said: "Incentive and conference travel is more than just a smile" and the reference was made to Egypt and then through the article it started to go on about infrastructure, about efficiencies, and on and on about what would be required. That always stuck in my mind and I am concerned that may be till this day, it is still in another's people's mind globally. This hasn't been updated since, because we do have facilities here today. Look at the hotels that have been built during the last 10 years in the resorts and in Cairo, the conference centre in Cairo. Definitely, we've got what it takes to put on a decent incentive and conference campaign. Besides, the pre and post of what we have to offer for conference is incredible compared to other countries. But, we have not positioned ourselves in that market strong.**

The informant highlighted what the ETA should do if they want to compete with other tourist destinations in so far as their new tourism product-mix is concerned. In his opinion, Egypt has got many points of attractions. It is represented in its wide array of products like culture tourism, beach or diving tourism, conference tourism, safari tourism, etc. However, this doesn't mean that the ETA should put them all in one bundle and sell them to tourists. This will never work in this very general method. What should be done from his view is to sell this augmented product separately, by cutting it into its single constituent aspects and then designing a particular campaign for each of these aspects and selling it to its target group. This should be preceded by detailed segmentation studies on the different segments of tourists globally and who could be interested in each of these particular aspects and so on. If the ETA adopted this methodology, the respondent claims mass-customisation will have a high opportunity of success. He exemplified his view in a campaign executed by the ETA for conference tourism for almost a decade ago which actually had a very positive impact as he declared; but nonetheless wasn't repeated again by the Egyptian public tourism sector despite its success.

Another informant echoed this opinion in more detail in another instance: **The ETA doesn't know anything about the specific needs of our customers. They have to bring the product a little bit closer to the clients. We have got too many products that we can mass customise to our customers. For example you can market your cuisine to tourists. We can do carnivals to our customers like what happened in Aswan for example. There was once something called 'Tea with the Nubians'. This product is actually to get tourist to talk with the Nubians and know about their history and culture through sitting with them have tea and taste their hospitality. Thus, actually I can sell each destination within Egypt separately because each governorate has its own tourist product. This is the diversification I am talking about. So briefly speaking we have to bring all the components of the Egyptian product and see what we can sell and what we cannot sell to our target markets.**

The key informant stressed the importance of going for specific products for specific customers if the ETA wants to implement mass customisation

in the destination. These specific products should be promoted through single campaigns. He believes that to better position Egypt in a highly competitive market like the tourism market is to go for specific audiences. Egypt has got a lot of potential but it lacks the managerial perspective that could plan for it so as to understand its positive tourist aspects and put it in its right place. Hence, market studies, particularly segmentation studies should be regularly undertaken in order to understand the ever changing needs and trends of the current international tourist market.

Seaton and Woodward (2007) asserted the opinion of the previous two respondents when they noted that there are two types of segmentation. These are called A priori and A posteriori type of segmentation. The first type of segmentation is where the base for segmenting a market is specified in advance by observation, experience or judgement of tourist behaviour patterns rather than on who they are e.g. purchasers of a particular product package, length of stay, etc. . Whereas, the other type of segmentation or A posteriori avoids the tendency towards premature market selection. The basis of this type of segmentation - the writers note- is that it is not determined beforehand, but rather emerges from the results of research surveys in which many tourist variables have been included for e.g. visitor surveys. In the case of Egypt, both types of segmentation have been undertaken by the international market research group in the UK to study the image of Egypt held by visitors in some selected international markets like Russia, Germany, France, Italy, The United States, Unites Arab Emirates and the Kingdom of Saudi Arabia. The research group conducted focus group interviews with a total of 14 groups of visitors in total from the selected 7 tourist markets. In each of these markets, one group was held with leisure travellers who have not been to Egypt (A priori segmentation), while the other group was held with leisure travellers who have been to Egypt (A posteriori segmentation). However it is not clear how the results provided by those surveys have been used by the ETA in order to modify or change its promotional policies according to these emerging results. Nevertheless, the researcher has attempted to analyse the promotional strategy devised by the ETA for its major tourism generating markets. This is discussed in more detail in the following section.

• **Promotional strategy of the ETA**

The promotion strategy of Egypt for the year 2007-2008 has devised some general objectives. Among them are:

- Increasing the rate of tourism growth from the main generating countries to Egypt such as Germany, UK, Russia, Italy and France, as well as the promising markets like China, India, Korea and Australia, in addition to the strongly developing markets like Eastern Europe.

- Developing the Egyptian tourism product in terms of undertaking ongoing diversification through adding more tourist products to its original cultural product such as desert tourism, yacht tourism, golf tourism, as well as spa tourism.

- Targeting new tourist segments particularly those who are characterised with high spending; and lastly

- Promoting Egypt as an all year round destination.

In order to achieve these objectives, the ETA has set up some core steps in terms of promotion, marketing studies, marketing strategies, as well as steps for updating the traditional promotional tools like the printed materials such as maps, travel guides and the different ads on the Internet.

- Regarding the promotion steps, the ETA has planned to continue in executing an integrated promotional campaign that targets a total of 24 generating tourism markets. The tools used in these campaigns include Internet campaigns, printed promotional materials, in addition to specific campaigns directed to the travel trade, public relations campaigns in the different generating markets of Egypt. The selection and timing of the use of these different tools is based on market studies of the international tourism trends.

- Concerning the marketing studies, it has depended mainly on conducting some studies executed by specialist international market research companies (like the study referred to earlier in this paper). These studies used as a starting point for an all encompassing marketing strategy for the new tourism product-mix of Egypt. This strategy will include different studies on consumer profile surveys, competitors' reviews, image and perception surveys, post test for the impact of the international promotion campaign of Egypt, as well as studying the profile of the different generating markets of the destination.

- Whereas other marketing strategies planned by the ETA were directed for certain tourism aspects such as the diving product, spa and wellness tourism, desert tourism, and golf tourism. These strategies based on some criteria. They were represented in conducting more detailed studies on the target markets, as well as the selected Egyptian tourism product; activating the cooperation with the Egyptian tourism representatives in Egypt, in addition to the directors of the Egyptian NTOs abroad, as well as with some specialised institutions for promoting certain aspects of tourism like spa and health tourism. Other criteria included using comprehensive marketing plans that contain all the promotional tools suitable for each of the tourist products on offer such as attending trade exhibitions, newspaper ads, specialised conferences, as well as contributing with the international travel trade in their printed promotional material for Egypt (ETA, 2007).

These were the major steps of the latest tourism promotion plan of Egypt. Although, there seems to be an effort exerted by the ETA in terms of modernising its traditional promotional tools in order to be able to compete with the latest techniques and tools used in the international tourism arena, operationalising these tools or knowing how exactly the outcomes of these tools will be used is still not clear. The plan was stating all the tools and strategies and criteria devised by the ETA so as to make the new tourist image of Egypt looks more attractive and thus more competitive with other tourist destinations. Bearing in mind, the fierce competition of the tourist products worldwide, the ETA seemed to be very keen in making Egypt try to catch the potential tourist eye and offer him all what he needs. Nonetheless, there is no steps mentioned that can indentify how the impact of each of these tools will be measured in terms of the number of tourists it will attract, from what segments, and how exactly it will influence their decisions to choose Egypt over other competing destinations. Seaton and Mathews (2003) in their review of the evaluation methodologies undertaken by the different international NTOs to measure the impact of their promotional activities stated that there are five basic phases for the process of evaluation. These are:

- Clearly defining the objectives for specific marketing activities, such as increased tourism revenue or increased awareness of a destination.
- Monitoring inputs i.e. the resource invested in specific marketing activities.

- **Monitoring outputs** i.e. the reaction to specific marketing activities such as the number of responses to an advertising campaign.
- **Measuring impact** i.e. quantifying the benefits of the activity and the degree to which objectives have been met, such as the amount of tourist expenditure in a destination that is directly attributable to the specific marketing activities.
- **Measuring impact relative to input** i.e. the benefits achieved in relation to the costs (Return on Investment) of specific marketing activities.

They further added that one of the robust techniques that can be used by the NTOs to measure the effectiveness of their marketing activities is called the conversion studies. These studies strive to measure the number of incremental trips, bookings or revenue generated through NTO activities such as a brochure, advertisement, broadcast commercial or NTO customer information service. It also depend upon a response mechanism or call to action being built into the activity e.g. a coded reply coupon in press adverts or a toll-free number for broadcast campaigns. To facilitate the measuring process; the names and addresses of enquirers are recorded (data capture) and a random sample is later re-contacted through a survey to find out whether or not they actually undertook trips on the strength of the information received, or planned to do so in the future.

This level of detail for measuring the real impact of the promotional and marketing effort undertaken by the ETA is still not clear in any of their written documents. Hence, it is difficult to decide whether the number of tourists that come to Egypt annually are actually the real outcome of the major promotional campaign conducted by the state or it was due to other reasons. Even the studies conducted by the research group in the UK discussed earlier in this paper were concerned about understanding the perceptions of certain tourists on some aspects in Egypt such as the satisfaction levels of their visits, Egypt's main attractions, most important factors in deciding to visit the destination, popular activities in Egypt and so on. The research group has actually arrived at very useful results but it is still lacking the tracking of these results with the same respondents whom they interviewed. For e.g. whether the ETA has altered its promotional activities according to these views? And have these consumers felt that change? And what were their reactions regarding these changes if they



have actually occurred? Without the ETA providing the real answers to these core questions, it deemed very hard to assess the impacts of all the promotional activities undertaken by them.

Nevertheless, it seems to the researcher that a lot of effort is executed for improving the exposition of the new tourist image of Egypt abroad but these efforts are disjointed or they are executed separately without any kind of follow up to its different phases. If the ETA wants to compete with other international tourism destinations, all these promotional efforts should be well co-ordinated with the travel trade either local or international from one side, as well as the ultimate user who are the real consumers of their products from the other side. This will lead us to the second theme mentioned in the previous section related to the Importance of Conducting Detailed Market Research for the new tourist image of Egypt. This theme is discussed further in the following part.

Second: Concerning the market research that should be undertaken by the ETA for the new tourist image of Egypt; one of the tourist professionals interviewed in this study mentioned his opinion in this regard which lead the researcher to the second finding pertinent to the second objective of this study. This is discussed further below.

### **Finding Two: The need for coordinating efforts between the ETA and the travel trade via research**

The tourist professionals interviewed in this study mentioned to the researcher that the new image of Egypt now is missing a proper market research that can clearly identify the trends in the international tourism market. In this respect, one of them stated:

**You know what we need is we have the ETA that does all this glitzy advertising and you have got the ETA with the money. What is missing in between all of that? It is the Research to guide the ETA and to guide the advertising company. This is because what I think is happening; let's face it. The advertising companies are businesses and they are slick businesses with very slick people working in them. Ok. They could come in and do amazing presentations if that wow you in a minute, especially at the**

**government level. What I think needs to be in the middle of that is a consultancy team that actually can go and understand the competitive countries and come back and realistically make statements to the Ministry or the ETA.**

What is stated by the respondent in the above quote is actually happening as discussed earlier. An international research group does really exist and it did three phases of surveys and focus groups in order to understand the international tourist perceptions of Egypt as a tourist destination. However, due to the lack of communication between the ETA and the travel trade either local or international on the outcomes of this process, as well as the absence of any documentation that can demonstrate how the findings of these three phases of research have helped the ETA in measuring the impact of its promotional efforts, nothing will be acknowledged or felt as indicated by the above respondent.

Another respondent highlighted this issue further in another occasion:

**There are good facilities provided with the new tourism product-mix of Egypt. But, I have to let sales people know about the product in order to go and sell it abroad. These details are not there for those people to go and get it and work on it. So it is still done individually, by which each tour operator is depending on himself to get this information and start to sell this product to the international operator. The ETA does not help in this matter.**

According to the above excerpt, results of the promotion campaign and the market research done by the ETA through its international research group are not channelled properly to the local tour operators who are actually considered to be the sales team of the Egyptian tourism product abroad. However, before sending these results to the local operators, it need to be further analysed and worked on through setting proper evaluation mechanism that can accurately assess its outcomes and consequently be able to monitor the degree of its level of success. However, the researcher think that one of the key challenges that deter an integrated process of evaluation which need a full integration from all the tourism sectors concerned is the level of professionalism among the local tourism workforce in Egypt either in the public or private sectors. This might explain why the results of the surveys and focus groups conducted by the UK research group where not used

effectively by the ETA. It is due to the absence of trained personnel in the Egyptian tourism sector that can efficiently process the results of the market research and thus be able to monitor and assess its results. This important reason constitutes the third finding related to the current research objective. It is the view of the key respondents of this study to the core reasons which influences the level of professionalism needed for the effective application of the mass-customisation concept in Egypt. This issue is elaborated further in the following part.

Third: By asking the respondents about how to improve the level of professionalism needed for the personnel in the Egyptian tourism sector either public or private in order to be capable for the efficient application of the mass-customisation strategy in Egypt, they came up with the following finding.

**Finding Three: The importance of conducting training courses among the human workforce in the Egyptian tourism sector.**

One of the key informants of this study expressed his opinion in this issue:

**They do miss the know-how. Hence, you need to work on these internal problems first before working on your promotion campaign and segmentation strategies. For example, the ETA should bring all those sales people who work in the industry and conduct training courses for them in order to raise their awareness on the important information they should know on the different types of tourism in Egypt such as the bird watching, the infrastructure that is provided for this type of tourism and so on. Parallel to these courses, they should conduct other courses for the staff at the ETA itself to also raise their awareness to important information they should know on the different tourist aspects in Egypt. Hence, both tourism sectors in Egypt will be able to speak the same language. But to work separately from each other, we are not going to achieve much.**

Lack of coordination and integration in terms of the details of the tourism facilities that are currently offered by the Egyptian tourism sector is one of the crucial elements that deter the whole process of promoting tourism in Egypt as the above quote refers. This is due to the fact that whatever work or effort is done as far as promoting the new types of tourism in Egypt is

concerned; it will not be translated into successful outcomes without the full cooperation and integration of all the sectors involved. Without the existence of this integration mechanism, all the work will take the form of individual initiatives characterised by lack of integrity, disjointed actions, which will ultimately influence the decision-making process, and hence the overall image of the destination. Therefore, there is a need for conducting specialised training courses for all the staff either in the public or private tourism sector? as the previous respondent advises?. These courses should take different levels. For example, preliminary level should be on general information needed by tourists on the different aspects of tourism in Egypt such as selecting a sample of principal hotels with their recorded capacities, important sightseeing and tourism sites, the different facilities offered at each site and so on. These courses should be directed to staff who have direct contact with tourists such as transfer men, tour guides, as well as tour leaders. The second level of training courses should be more advanced as it would encompass more specialised courses directed at the managerial level such as tour operators and the heads of the different departments such as research and monitoring department at the ETA. The contents of these courses would include applications on the latest tourism market research techniques in terms of different quantitative and qualitative methodologies, as well as evaluation mechanisms of the promotional campaigns conducted by the ETA abroad. If the ETA succeeded in conducting these courses at the destination, there is a high possibility of success for the effective application of mass-customisation in the destination:

**Finding Four: The need for a mixed team of Egyptian and foreign staff to work together for the ETA for the effective exposure of the new tourist image of Egypt abroad.**

Another key respondent mentioned his view when discussing the level of professionalism needed for the promotion of the new tourist image of Egypt and thus the tendency for the application of mass customisation in the destination:

**I think you need a combination of Egyptians and foreigners to work on the major advertising campaign of Egypt. Or they have to take that campaign and move it to their agency in France or London**

**or Brussels and test it with their colleagues at the advertising agency over there. Not just do it here locally as Egyptians because most of these advertising companies here are going to be I would say probably 100% Egyptians.**

The respondent above advocates for the foreign advertising company to work with the Egyptian staff at the ETA regarding the design and direction of the major promotion campaign of Egypt abroad. He sees that the Egyptian staff need the input of the foreign tourist professionals to better understand what the ultimate user needs from the tourist product of Egypt. Although the ETA hire foreign advertising company in its major generating markets abroad but this is in terms of deciding the good timing for the exposure of the different promotional material of Egypt and where to expose them but not sharing them the designing of the contents of these ads. Hence, the foreign staff could help the ETA in terms of conducting brain storming sessions with selected high officials from the ETA concerning choosing the suitable shots for the different ads of Egypt, how to be presented and to whom. This will enable the ETA personnel in getting closer to potential consumers in the international tourism market, thus understand their needs and consequently position the right product for the right segment.

Fourth: Regarding the absence of reliable statistical base based on scientific criteria that can give indicators into the growth percentages of the different tourist nationalities in Egypt. One of the interviewed respondents reflected this issue in the following finding.

**Finding Five: Availability of reliable statistical base is a key factor for the success of mass-customisation in Egypt.**

**One of the challenges that you have actually and Egypt need to think about this; if Egypt cannot really produce reliable tourist statistics and share them on a regular basis with the ground handlers here, because we've become spokes people for these tour operators abroad, and as well we can pass these data over to those tour operators abroad to be able to plan the product; then those risks of the product developments will be based more on a gut feeling as opposed to that pure hard facts. Thus, it will be hard to convince your manager in the UK that I would like to put three pages in a**

**brochure for a safari in a new brochure when it is going to cost him I don't know how much money and it is not going to be based on actual figures?? That's not going to apply...**

A key factor for the success of mass customisation in Egypt as the above respondent expresses is the existence of a strong statistical database for tourism in Egypt. This will act as an important information source for the process of segmentation which is one of the key elements of mass customisation. In this respect, Seaton and Woodward (2007) argue that the foundation for good segmentation is based on the collection of robust tourism statistical data. They added that tourism visitor surveys would provide the most successful source of identifying the different tourism segments that visit the host destination. The most common factors on statistical collection identified by the NTOs they interviewed were activities undertaken during the trip (e.g. skiing, diving, golf, culture, etc.), booking mechanism, contact with the NTO, demographic data (e.g. age, occupation, income, education, family, etc.), motivations (e.g. recreation, culture, adventure, sun-seeking, etc.), purpose of visit (e.g. business, VFR, leisure, education, special events, etc.), sources of information when planning a visit to a country and type of accommodation used.

These are some of the data that should be available with the destination public sector Authorities for the proper segmentation of their target markets as the above writers claim. However, to solve this statistical shortage at the destination, there was an important initiative adopted by the Egyptian Development Authority (one of the authorities that belong to the Egyptian Ministry of Tourism and entrusted with the planning and development of tourist projects at new developing areas) in collaboration with the Central Agency for Public Mobilisation and Statistics in Egypt. This initiative has resulted in the production of a sample survey aiming at developing the statistical system in Egypt in order to be able to estimate the total tourism expenditure in the destination. This survey was conducted during the years of 1990, 1992, 1994 and 1996. The methodology of this survey was based on grouping visitors according to their nationalities, and then distributing questionnaires on them in the different airports during their arrival and departure. This method was considered to be the best method in terms of its accuracy as it depends on asking tourists directly on their average length

of stay, which will then lead to determining an average expenditure for each nationality. This rate will be used as a base to calculate the total expenditure of tourists coming from each country. However this method had suffered from some disadvantages. Chief among them is the limited size of the sample which represented only 1.2% of the overall selected sample. In addition it didn't cover all the principal tourist departure points. The survey also was missing some important statistical data such as statistics on domestic tourism in Egypt, as well as statistics on outbound tourism, as well as numerical clarification of the actual contribution of the tourism sector to the overall Egyptian economy through the independent sectorial relations (Higazy and Abdelrahman, 2007). Nevertheless, the researcher views that these surveys were a very good initiative adopted by the Egyptian public tourism sector to establish an accurate statistical base in Egypt based on scientific criteria and actual rather than hypothetical data.

These were the solutions mentioned by the different key informants in this study which reflected their personal views on the possibility of the application of the key elements of mass-customisation in Egypt. These solutions are represented in:

- First: The ETA should plan for a single campaign for each tourism product.
- Second: The importance of establishing coordinating efforts between the ETA and the travel trade via research and consultancy.
- Third: The need for training courses for the human workforce in the Egyptian tourism sector, as well as sharing knowledge and expertise through hiring foreign staff to work with the ETA staff particularly concerning the execution of the major advertising campaign of Egypt in its major overseas tourist markets.
- Fourth: The importance of having a reliable statistical base for the success of mass-customisation in Egypt based on actual tourist performance.

The next section will draw the findings related to the third and final objective in this study.

**Objective Three: Identifying the opportunities and challenges of mass-customising the new tourist image of Egypt.**

The previous sections delineated the findings pertinent to the first and second objective of this study. The findings of the first objective represent the core elements that should exist ? from the private sector professionals' viewpoint ? if the ETA considers mass customising the new tourist image of Egypt. However those core elements represent a challenge for the ETA at the present stage as their application is hindered by many factors; chief among them are the human and financial resources which act as major obstacles towards the effective application of mass customisation in Egypt. Nonetheless, as this research suggests after the analysis of the different stakeholders from the public and private tourism sectors who participated in this study, there are some solutions proposed for each of these challenges. These represent the findings of the second objective of this paper.

On the other hand, if the ETA succeeded in the application of mass customisation in the destination after the consideration of the above stated solutions, there are going to be good opportunities for the effective positioning of Egypt in the international tourism market. The important findings related to these opportunities are listed in the following part.

**Finding One: Mass-Customisation will give Egypt a good competitive edge among other destinations.**

All respondents from the private sector who were interviewed for this study agreed on the many benefits that Egypt could gain through mass customisation. Chief among them is the good competitive position for Egypt if it successfully applied mass customisation. His view is reflected in the following quotation:

**Market research is indicating that people are so well travelled now; they don't want to be herded around in large groups and if they have a little bit more money, they are prepared to be what they perceive as an independent traveller; which could be mass customisation. Its how you positioned it to them. So there is recognition of this in Europe now. Everybody moved towards mass. Hence, if Egypt could do this mass customisation successfully, this will offer her a good competitive position.**

As the above respondent notes, if the ETA could implement mass customisation successfully through offering more facilities into its different



products like the beach product for example. This would give her a high competitive position over other destinations who offer the similar products.

**Finding Two: Mass customisation will bring increased tourist numbers into the destination**

Another advantage mass customisation could offer is it will increase the overall tourist numbers in the destination as a result of selling the products to high numbers of tourists. This is given in the following excerpt:

**If we do apply mass customisation properly in Egypt, it will have great advantages actually. The tourist numbers will increase. I will sell more trips or more than one product to each segment. The confidence in our product will definitely increase. This is because you have reached a certain level of details about your product that do not exist anywhere. It will have endless advantages for Egypt as a tourist destination.**

The new combinations of products that will be offered through mass customisation to tourists after undertaking careful studies into the needs and trends of the international tourist segments will lead to increased volumes of tourists to the destination which will lead to more revenues.

**Finding Three: Mass customisation will boost the selling for some specialised aspects of tourism in Egypt**

Mass customisation could actually help Egypt by increasing the selling of some aspects that are characterised by low demand. An example of these products is spa tourism. A key respondent said about this:

**We do have spa treatments in some 5 stars hotels in Egypt. But when I come to talk about treatment, it exists in certain sites like hammamat Pharaon and Oyoum Moussa that possess sulphur spots for treating skin diseases. But still these places are lacking enough information available about the number of hotels close to these sites for the tourists to stay in after finishing their treatment courses. There must be something written for these services that could be used as references for all the concerned stakeholders who work in this type of tourism. Therefore, Egypt could have a high opportunity of mass customising this type of tourism by planning an integrated campaign under one type of tourism which is spa tourism.**

Mass customisation would allow the ETA to augment the selling for its

individual tourism aspects, particularly those that are characterised with small numbers like spa tourism as mentioned in the above extract. If the ETA provided the needed facilitates into each of these tourist aspects and then planned a good advertising campaign for it that could inform the potential tourists of these facilities and how it could be used, there will be a high potential for increasing sales for these specialised tourist products.

**The following table summarises the opportunities and challenges of mass customisation in Egypt that could also be applied at any tourist destination.**

### **Opportunities of mass customisation in Egypt**

<b>Challenges of mass customisation in Egypt</b>	
<ul style="list-style-type: none"><li>• High competitive position.</li><li>• Increased tourist numbers.</li><li>• Augmenting sales for specialised tourist products.</li><li>• Limited training for human resources.</li><li>• Limited statistical information on the different tourist segments.</li></ul>	<ul style="list-style-type: none"><li>• Limited segmentation studies.</li><li>• Lack of coordinated efforts between the public and private tourism sectors.</li><li>• Financial constraints.</li></ul>

### **Conclusions, Recommendations and Future Research**

This research paper represents an initiative for the application of the mass customisation concept in Egypt, as well as any other tourist destination that offer similar tourist products. The major results of this paper suggest that effective segmentation strategies; detailed market studies in the different generating tourist markets; high level of professionalism among human resources; possessing reliable statistical base for inbound tourism are key elements that should be available at any destination attempts to mass customise its tourism assets. However in the current case of Egypt, these elements represent somehow a challenge from the tourism stakeholders' viewpoint at this stage in the destination. Accordingly, they suggest some solutions that should be taken into consideration by the ETA, if it is seriously thinking about mass-customising the new tourist image of Egypt. These are:

- The ETA should focus its promotional campaigns on some facets of the Egyptian tourist product such as beach tourism or conference tourism in order to highlight its special facilities and create new ones so as to satisfy new targeted specialised segments.

- There should be an exchange of experience and managerial knowledge between the public and private tourism sectors in Egypt; as well as with the international tourism trade through undertaking joint marketing and segmentation studies.

- To achieve the above recommendation; the level of professionalism of the public and private sector personnel in Egypt should be raised through the execution of highly specialised training courses, particularly concerning the implementation of the major advertising campaign of Egypt in its major overseas tourist markets.

- The necessity of resuming the attempt initiated by the state in the early nineties for establishing reliable statistical base in the destination.

- Nonetheless, the concept of mass customisation is considered to be a relatively new concept as far as tourism products are concerned. It has always been confined to the field of marketing goods rather than services. This is due to the relative ease associated with the marketing of goods represented in the possibility of trying the goods intended for purchase before its real purchase. This might make the application of mass customisation in the domain of services an expensive and rather a risky option for tourist managers. However, this paper stimulates further research in this less researched area of marketing services through providing a workable framework of mass customising tourist services.

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# Demographic and Economic Patterns in Italian Tourism in the Last Century

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## Abstract

Public organizations are charged to provide public health, and when, at the end of the 19th century, doctors recognized that thalassic therapy for children could prevent adult diseases, local and national institutions created seaside resorts for children whose parents weren't able to afford a vacation.

Today industrial evolution and social insurance allow people to work less and earn more, so almost all families have the means to take holidays all together.

Most of the buildings, once able to recover hundreds of children, are now abandoned.

The disappearance of the *summer colonies*, once seen throughout Western Europe, reflects these enormous changes and the passage from social to individual tourism. The earlier form of social tourism has been modified from a health service into leisure and recreation.

## Foreword

In antiquity people used to move only for practical reasons: for religious, health, or family visits (Casson, 1974).

The origins of tourism are also related to concrete motivations, mostly health related; on the other hand, tourism for amusement is only a very recent occurrence, deriving from mass tourism since the sixties.

Health reasons include visits to sanctuaries in order to pray for miracles, or to mineral or hot water sources, both useful for physical rehabilitation. This gave origin to the fashion of the "baths" from which some resorts derived their names.

The baths were an elite form of travel, used by the rich, for whom they also offered the opportunity of social meetings, balls, and receptions.

At the end of the 19<sup>th</sup> century it was discovered that sea environments were good treatments for some illnesses such as rheumatism, respiratory infections, and children's growth problems.

Mountain climate is also good for children and the elder, but the seaside has, since then, attracted an increasing number of people around the world. The seaside was judged so effective that charities and governments started, at the beginning of the last century, to send poor children to sea resorts and to host them in public facilities created for this purpose. Marine climate was reputed the best solution for a widespread children's illness: the *scrophula*<sup>1</sup>.

Scrophula wasn't dangerous in itself, but as it could evolve into tuberculosis for which no medicines existed until 1946<sup>2</sup>.

<sup>1</sup> Scrophula (Scrophula or Struma) refers to a variety of skin diseases; in particular, a form of tuberculosis, affecting the lymph nodes of the neck. In adults it is caused by *Mycobacterium tuberculosis* and in children by nontuberculous mycobacteria. The word comes from the Latin *scrofulae*, meaning brood sow (Microsoft Wikipedia, 2005).

<sup>2</sup> Tuberculosis caused the most widespread public concern in the 19th and early 20th centuries as the endemic disease of the urban poor. The bacillus-causing tuberculosis, *Mycobacterium tuberculosis*, was described on March 24, 1882 by Robert Koch. He received the Nobel Prize in physiology or medicine for this discovery in 1905. Koch announced a glycerine extract of the tubercle bacilli as a "remedy" for tuberculosis in 1890, calling it tuberculin, but it was not effective. It was not until 1946 with the development of the antibiotic *streptomycin* that treatment, rather than prevention, became a possibility (Microsoft Wikipedia).

## Introduction

At the beginning of the 20<sup>th</sup> century, governments generally initiated policies concerning social issues, and frequently they associated social policies with health issues.

Public organizations were charged to provide public health, and when doctors recognized that thalassic therapy for children could prevent adult diseases and that this proactive sanitization would cost less than lasting infirmities and help assure a healthy work force, local and national institutions tried to create seaside resorts for children whose parents weren't able to sustain a long residential vacation.

The success of marine resorts also led to the construction of mountain resorts<sup>3</sup>.

These organized vacations related to health issues were named in France "*colonies de vacances*"; in Italy "*colonie estive*" which we can translate as "*summer colonies*".

I will refer to these places and to these buildings as "colonies" throughout this paper, also utilizing this word for the system itself.

Now most of the buildings, once able to recover hundreds of children, are abandoned. As they fall apart, they have a strong physical impact on territory, involving planning managers in discussions about how to utilize them in new forms<sup>4</sup>.

The end of this era permits a discussion about the pros and cons of these summer colonies, contextualized by the lived experiences of the author, both as an involved child, and later counselor, after having obtained the title of teacher.

## From Social to Individual Tourism

The new millennium marked 100 years of elite tourism and 50 years of mass tourism history in most of the Western countries.

During this century, leisure, more than other activities, has been conditioned by demographic changes such as declining birth rates. The lowest birth rate of the entire world is now found in Italy, and very low birth rates also characterize some other European countries such as Germany and Spain.

This factor, combined with the decreasing of agricultural work force and high performances in industrial and technological production is also strongly influencing the time and the money people have for vacation.

In Italy the effort to build summer colonies reached its peak during the dictatorship of Mussolini (1922-1943) who wanted to assure a healthy population to a deprived nation.

Today, on the other hand, the phenomenon of colonies, as collegial forms of holidays, is receding because children are not as subject to these illnesses due to chronic under-nutrition, and the improvements in living conditions can offer the entire range of vitamins and proteins they need.

Industrial evolution allows people to work less and earn more, and permits a more balanced distribution of welfare; the social insurance provides employees with paid free time, so now almost all families have the means to take holidays all together: children and parents.

The disappearance of the colonies, once seen throughout Western Europe, reflects these enormous changes and the passage from social to individual tourism or from a holiday to restore health to one intended for primary amusement.

## The Origins of Social Tourism

The creation of sea hospitals began in the UK in 1796, in France in 1861, and in the Netherlands and Belgium in 1888.

The first forms of children's assistance in Italy dates from the second half of the 19<sup>th</sup> century. Milan was the first local government to organize colonies in 1881, and the second was Bologna in 1889, as two of the richest cities in Italy.

In 1867 there were 21 health hospices for youth in Italy; in 1876 there were 70, then 100 in 1885, but a systematic network of organizations dates only from the first years of the 20<sup>th</sup> century.

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<sup>3</sup> In effects in 1972 the school non profit agency of Ferrara Province declared that the mountain climate was better than the marine one, and teachers recommended that parents send their sons and daughters there.

<sup>4</sup> After the Second World War the colonies were used by Allied Forces (Sanjust, 1951: 44).

For Italy these were the years of post unification, of the creation of a new unitarian state, and philanthropists desired to create a strong nation based on health population (Fabbri and others, 2003: 19).

The creation of colonies was first an idea of private charities; with the Royal Decree of 3.20.1910, the government created a moral corporation or "Institution of Public Assistance and Beneficence" (IPAB) to care for children. The colonies appeared at the same time the sanatoria were closing, as a passage towards a proactive health policy. Unfortunately, the benefits of summer treatments vanished during the winter, because of poor nourishment conditions and a lack of hygiene at home. One solution to these disappearing benefits was the creation of clinics in residential towns which organized weekly controls for children. The best solution, however, has been procured by the general economic development and increases in workers salary that came decades later.

In Italy, hospitals were constructed along the two sea sides of the peninsula, especially in northern and central Italy, sponsored by middle class charity groups and later by industrial or workers' associations. Statistics indicate that 2,500 assisted children in 1902 became 100,000 in the year 1922; 350,000 in 1932, 700,000 in 1936; 940,000 in 1942 (Sanjust, 1951, p.6); and, in a more recent work of 1969, Ferrua (p. 320) quotes 2 million assisted children in Italy<sup>6</sup>.

Reggiani states that in the period 1868-1910, the religious institution of *Opera Pia* in Bologna hosted 8,121 children, out of which 1,460 were healed; 3,723 improved greatly, 2,270 were healed a little, and 13 died.

The national statistics generally estimated that 44% of scrophula children improved, but 100 per cent were healed in France because the children stayed for six months instead of one.

Along the 14 miles of coast by the Adriatic Sea in northern Italy, from Marina di Ravenna to Cattolica, it has been estimated that, until the seventies, 246 buildings with 2.5 millions cubic meters and 1.5 million quadratic meters existed (Tamini, 2003: 72). The constructions were open toward the sea, on a large surface, as counseled by the French doctor Meseurer (1908) to take advantage of the marine air. In these buildings boys and girls were hosted for one month, or, in some cases, 20 days.

One might think that one month is a too short period for recovery: we have to remember that it was necessary in order to host the maximum number of fragile children through several rotations during the summer season. Some documents testify in favor of the 30 days period to ameliorate situations.

Doctor Azzi, at the beginning of the last century in Rimini, claimed that even one month is sufficient to do well, and supported his statement with pictures of children before and after the sojourn. The collected statistics he published demonstrated that 3,500 children gained weight, on average 1.220 kg, which was 4.81% of their original body mass, much more than the usual, even considering that spring and summer are the months of major physical increase<sup>6</sup>. Doctor Azzi states that only 2.5% of children had a decrease (1934: 14).

Pictures too demonstrate the betterment of assisted infants (Dall'Olio, Manservisi, 1956).

The Ministry of Education published a document in November 1946 declaring an average weight increase of 1.5-2.5 kilograms, more than the usual increase.

However, when shorter periods were organized, the Ferrara Prefecture pointed out that 15 days were not enough. The Prefecture was also in charge of controlling the hygienic conditions and in 1948 noticed some inadequacies in old buildings. The Prefecture confirmed the sanitary goal of colonies and requested that, at least, one doctor, nurses, and a first aid post would be provided. The Prefecture also decided the dimensions of the spaces, and the number of hygienic services<sup>7</sup>.

## **Fascist Proposals**

Hospitality mansions were created for proactive reasons, due to the fact that in Italy, in the period 1921-25, child mortality was more than 30% for those aged 0-5 (Luminasi, 1932).

It is important to evaluate the social and economic situation of the Italian families of this period: usually families were composed of a dozen members, less than 50% had water in the house, and in

The age for State colonies was generally between 6 and 12, the private ones accepted older children, but not younger.

<sup>6</sup> Only 2% had a loss.

<sup>7</sup> The dormitory space were scientifically organised by Ministry of Education rules, so each bed had 6.55 square metres of space and 32.75 cubic metres.

popular buildings, bath and shower were not existent; 1.9% didn't have a latrine, children didn't have their own beds.

This health policy aspect changed during the Mussolini dictatorship, in order to increase the number of inhabitants to make the nation stronger.

At the beginning of the last century, colonies were utilized to care and to teach children how to learn basic hygienic and nutritional habits not known at home, because of extreme poverty. Some educators remind us that poor children didn't enjoy varied and rich food, because their families couldn't share it with them. It was only during these summer months that these children first slept in a bed, especially a single bed. A large part of the population didn't know, a century ago, a mattress. Mattresses then were made from sacks of cornhusks.

However, these conditions were drastically altered by the economic boom of the seventies (Manaresi, 2002: 44-45).

In the inter-world wars period, the colonies were proposed to the University students too.

At the University of Bologna a document exists, published in 1934 (PUF), informing university students about the possibility of attending for 1 week, a marine colony in Venice in the framework of the program "Marine Weeks", organized by the GUF (Jung University Fascists Organization). For seven days, they had to pay 130 Liras (about ten cents in dollars), a big amount in those years, but we have to remember that the beach of Venice is one of the most elegant in Italy and that participants could enjoy all the elite sports, such as fencing, rowing, sail, tennis, golf, and riding, in addition to several excursions and celebrations in Venice. The students were furnished with a city guide, public transport schedules, and they were informed about the presence of a telephone booth on the main avenue.

University students had, also, in those times, the opportunity to enjoy cheaper camping in southern Italy, at the price of 15 Liras (one tenth of the Venice colony), but all the students were obliged to wear the fascist uniform: white trousers, white shoes, black shirt, blue neckerchief, and student's panama.

ENPAS, the State employee charity, required (4. 30. 1947) guests to arrive at the summer stay with underwear, a white cotton sun-hat, one swimming costume, sandals, two towels, one comb, and one toothbrush.

## **The Economic Costs**

At the end of the nineteenth century, expenditure per child in the colonies was 93 Liras (one dime), but managers were able to reduce it to 80 Liras and to 62.7 Liras in 1912 by direct acquisition of food supplies<sup>8</sup>.

In 1950 the prices for children in public-owned facilities were established at 10 dollars for one month, and a half dollar more for transport; the prices doubled in 1972.

Obviously, the institutions were economically sustained by local Governmental bodies and banks as well as by the Ministry of Education (Dall'Olio, Manservisi, 1956: 36). Although sugar was one of the most expensive nourishments, some recoveries of health were noticed after the introduction of sweet afternoon snacks.

There were four types of accommodation: one sustained by charities, free of charge; the second was half paid by the hosts, and half by local, regional, or State governments; the third was offered by big enterprises to employees' sons and daughters, free of charge. This last arrangement has always been the most luxurious and has persisted until today.

Another form of hospitality was organized by the Ministry of Education in 1950, but it shouldn't be considered a colony, because it did not offer overnight stay: schools would stay open during the summer, to host the peasant-women's or rice-harvesters' kids during the day. Especially rice-harvesters women were migrant workers, because in the rice field localities, workers weren't numerically sufficient. Today this form of migration doesn't exist anymore, because of better economic conditions and decreasing rice production in Italy.

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<sup>8</sup> The most expensive aliment was the sugar.



## **The Evolution of Tourism: from Health to Leisure Through Education**

The earlier form of social tourism has been modified from a health service into leisure and recreation. Now, more game time is inserted in public hostels instead of the military discipline of a century ago or of the dictatorship years. Decades ago, children would attend flag-hoisting in the mornings and evenings; they had to march in order; to pray before eating, to go to bed and wake up at the same time, also to sleep in the afternoon, even if some of them weren't used doing so at home. Evening free time was used for watching films or documentaries.

Even the excursions were organized in lines, two by two, and the little guests weren't allowed to enter the city. Effectively the residences were separated from the villages in which they were situated by gates and high walls<sup>9</sup>. As the buildings were located outside the urban profile, even the inmates' promenades were conducted in separate territories.

In 1950 the Ministry of Education declared that colonies should add an educational function to their sanitary function, in order to develop principles and rules of community life<sup>10</sup>.

Living together can become a democratization process, and a good pedagogic experiment should favor a horizontal dynamic society, instead of one with vertical impositions. But these suggestions, deriving from the social change that invested Western society in the seventies, didn't find an opportunity to be realized in these situations, because the democratic process favored by economic and industrial evolution advanced the workers' economic conditions, and with compulsory legal paid holidays to the employees, children started to go on sea or mountain holidays with their parents. More than this, new forms of collectivism were offered by charities or by the evolving market, such as camping for teen-agers or hostels for youth. These opportunities aren't much offered in Italy, but may be more common in Anglo-Saxon countries. In effect, if this holiday solution were more accepted, colony buildings would today be utilized for that, instead of being abandoned.

As tourist flows were increasing on the seaside, the hostels area progressively declined, and as more families could enjoy a summer holiday, the situation of the regimented children become more absurd.

According to some psychologists, this experience displaces the family, the school, the friends, the neighborhood, the streets, and all other personal habits: because of this it can be disruptive; it would be preferable for hostel life to be as similar as possible to family life.

### ***Some criticism***

During the summer of 1970 a group of representatives of 5 colony institutions denounced through a leaflet presented to tourists, children's parents, and the inhabitants too, the precarious situations in which operators and children were living, in particular:

- The military discipline,
- The adults' moral impositions,
- The inadequacy of living conditions and spaces,
- The lack of preparation of all degrees of workers,
- The low salary of employees;

In conclusion, the supervisors expressed their hope that the colony institutions could change, offering children better conditions and opportunities to develop, rendering them able to enjoy a peaceful community and to receive the education to make them responsible citizens, not merely obedient puppets.

The leaflet cited also the unacceptable conditions of colonies managed by religious institutions, maybe worse than others. (Several depositions, on Italian television, confirmed this statement). (Frabboni, 1971: 153-55).

<sup>9</sup> A negative aspect, present in all the colonies, was a separate building hosting children with a communicable disease. To assist to a segregation of a child in a specific separate house, without allowing visits, is the most sad scene for all the hosts, both the healthy ones and the ill ones. Nobody sustained the right choice: that means to send ill person to the hospital. No! Every day the phantom house stayed in front of children playing on the court. Some witnesses affirm that some ill children were restored after the visit of their mother, even if the poor women had to see her child only outside the window (Reggiani, 1911, p. 24).

<sup>10</sup> A leaflet published by national school charity on 3.31.1969 and diffused in all the school, was reporting these words: "The holiday house is the fittest site to develop the gradual children inclusion into society".

## **The Pedagogic Perspective**

Professor Frabboni of the Education Department at Bologna University is very critical of the military aspect of scheduled days. He suggests children should decide how to spend their free time.

Frabboni thinks summer colleges should integrate the physical and psychological experiences of kids, instead of disrupting their lives. He suggests they derive experiences from the community, enlarging their mental perspective, instead of restricting it.

For these reasons, in the seventies, professor Frabboni organized a cultural revolution in this rigid scheme: with Bologna University students he entered into a colony to do some experiments.

First of all, they requested guests to fill out some forms in order to know the children's preferences.

In fact, the answers were not consistent with adults' decisions: they preferred to organize their games by themselves and, ideally, they preferred to choose eventually their counselors. If the first option is easy to accept, the second one involves a more psychological concern, justified by the fact that children and counselors would live together day and night, 24 hours a day. This habit can create a sort of psychological dependence once children have accepted the counselors assigned to them. Other mental unbalances occurred when counselors left the institute during their free day each week, substituted by another.

Frabboni drastically changed the organized life of the colony. The result was impressive, children were given a freedom never before experienced in a way that tutors, directors, health and service employees, and parents too, didn't accept, and that children weren't able to manage. The only positive aspect was the relief of the anxiety generated by the old system in itself; not only had children been oppressed by a rigid authority, but all people working in the organization had been distressed by the responsibility and moral load of hundreds of little guests.

Frabboni suggests interaction with the environment and social communities as a process of discovery for emotional growth. According to him, such a period can be utilized as a break between the disciplined time of institutional education and free time at home (1971: 84).

## **Other Perspectives**

The author of these pages would propose a compromise between the old system of organization and the new one proposed by Frabboni. The author thinks the summer colony should become an educational event, not only to develop community life, as asked by the Italian Ministry of Education, but in a systematic sense, because it is no longer a health resort and new perspectives are seeing education as the most compelling exigency of modern life. Better nutrition and improved quality of life make climatic adjustments unnecessary, but the post industrial or consumerist society requires a more communitarian integration than that offered by mononuclear families.

The national birth rate in Italy is today 1.2 children per female; the one child family is the norm, so children aren't used to living with others, or sharing experiences and perspectives with mates, so individualism and ego-centrism are pervading everywhere. The solipsistic form of personality lets children grow feeble, collapsing in front of the difficulties of life. Lengthening the school days or extending the school calendar into the holidays is a good policy: study and homework shouldn't be judged a penalty, but a joy for children and adults, because education is one of the principal aspects of scientific progress.

The colony system is today very expensive, so all the structures should be utilized in a systematic way, to form a complete personality.

The temporary sea colonies were in Italy a typical fascist institution, but, at the same time, they introduced a democratization process, sending poor children and ill children to the same beach where rich children were going with their families for leisure.

Certainly the locality of Rimini was the first site where doctors discovered the good effects of the seaside influence, but this was the area where the dictator of the interwar period was born, his preferred coast, where he usually took his sun baths; during his government the colonies institution reached its peak. He strongly supported this idea as a way to have a numerous and healthy population. This organization was a logical extension of the demographic policy that promoted family planning, with prizes for big families with numerous children and penalties for single men.

The hidden goal of this policy wasn't to have healthy people, but to have strong men able to fight in war, in what turned out to be the Second World War.

## **Post Colonies Environment**

The presence of huge abandoned old buildings on the most famous beaches is today very impressive. Some of them are semi-destroyed, some have lost windows and doors; grass is invading the gardens. It is important to note that they occupy the sea front, very near the shoreline, where new buildings are prohibited. For this reason they have become very attractive from a business point of view, especially for investors trying to modify the colonies into residences or hotels, but this operation isn't easy for public owned properties, for which all the administrative processes are slow. The function change is also very expensive, due to the large dimensions and to the transformation from communitarian use to a personal one. The easiest change has been the transformation into schools; one big colony is now a youth hostel, another Sea-World, another a fitness center; some are administered by religious groups hosting clients at an inexpensive cost, some are transformed into residences or luxury hotels, but architects are protesting about the demolition of a lot of them: "Erasing the witnesses of the past, that is characterizing the territories identity, tourist resorts would become homogeneous with urban degraded slums, reaching a progressive economic devaluation" (IBC, 1986, p. 13).

Very curious to note is that the colonies occupied the same beaches which are today the most famous for leisure time and for VIP society. On 8. 6.1951 a Ministry of Education Decree prohibited the construction of new colonies in specialized tourist localities, especially in downtown, in order to avoid "detriments". The document doesn't specify what these detriments or damages were, but it states that some managers or administrators were complaining about the presence of buildings modeled like prisons, overshadowing the reputation of famous resorts. The aspect of captivity was underlined by the necessity of diphtheria, smallpox, and typhus fever vaccination. According to the actual economic perspectives we suggest a perennial exploitation of buildings, instead of abandoning them. In my opinion, these great buildings can and should host children in a recreational way during the entire year. During the winter season, too, they can host school students with their teachers, engaging in school work, sports and, surely, leisure, because, if the location is the means for health, it would have essentially the same effect during cold periods. The learning experience would be more inserted in the children's routine, the hostels would be more efficient with year-round guests, and education would be integrated with knowledge and leisure time, as in modern colleges around the world.

By utilizing the colonies on a year-round basis, charities could enable more children to gain the benefits of this environment, and the area would have a more lovely inhabited landscape

## **The Author's Personal Experience**

I have the chance to say something about a phenomenon which I experienced at different stages of my life, because of all the situations I have encountered.

My father was a strong supporter of the colony idea, so enthusiastic that he sent me to this sort of college until the age of fifteen and before the legal age of six. He fought to obtain my inclusion and he succeeds as my sixth birthday was in November, few months after the summer period. More over, my parents didn't allow themselves a summer holiday, because they worked only during the summer, my mother as a peasant, my father a sugar industry employee; in the Italian north plains, sugar beets are harvested in August and soon transformed, as such this work only continues until October.

Summer holidays weren't possible for my family, nor were holidays in general, because with only 3 or 4 months of work, their earnings had to sustain the family all year round.

In these conditions my first experience occurred in 1954, and it was disruptive.

My family conditions were poor, but so were the Italian conditions in general. One aspect of the colonies system in particular was very expensive: the transport. A solution was to amass children on a truck like animals, and like animals we were herded up a ramp into the truck. Upon our arrival, the situation worsened. I remember a big, too big, sleeping room with dozens of unknown mates. I arrived at the hostel with new clothes, but after only a few days I was robbed of them, covering myself with the old clothes the thief left. I lost the first toothpaste and toothbrush I had in my life, robbed not for their value or attractiveness, but for the candies that accompanied the package as

advertisement (stupidly joined to the toothpaste tube to attract children to use it). Unfortunately the thief didn't steal my sandals, which became my trial all through the month of my stay there: I wasn't able to tie them, and during the promenades I remained the last in the line, unsuccessfully tying them every moment.

Worse than that was the bath in the sea: 1,300 children<sup>12</sup>, males and females separated by a few meters, were compelled to run into the sea at the whistle ring. The bath would only last a few allowed minutes; for this reason the first day I went on the front line, to profit more from these few minutes of amusement, but....I was submersed by the mass behind me, and I fell face down in five centimeters of water. My love for the sea sustained me in fighting against difficulties, so, on the second day, I stayed at the back of the line, but this was not a good idea, because before I could touch the water, the exit whistle rang, so immediately hundreds of children, running out of the sea, submersed me. This time, I not fell on my face, but on my back in the sand.

Years and years passed before I could find the serenity to learn to swim.

I went on colony until 15 years, a very late age, for which only a few possibilities were available, at high cost.

Finally, I became adult, and with my title of schoolteacher I became a caretaker.

I haven't remarkable remembrances of this experience because I only remained at this post for a year.

## **The Last Colony**

In order to bring myself up to date, last summer I visited the area where most of the colonies are located.

I walked past one of the last existing colonies, owned by the national phone company.

Without knowing who I was, one boy approached me behind the fences and asked me if I appreciated his hat. I answered affirmatively, but I didn't understand why he had to ask me that. He explained later that he colored his hat red because he didn't accept the rule that he had to dress the same way as his peers, all in white.

I discovered during the conversation, that he tried to distinguish himself from others because he was the oldest, aged thirteen, and he didn't accept the discipline, even if the hostel was elegant with a green garden and a nice swimming pool; he was rich, at home he had more than a boy could desire and he was missing his toys.

In few minutes our entertainment was interrupted by the children's supervisor asking the boy to come back to his mates.

## **Conclusions**

We can state that the phenomenon of the colonies has persisted for a hundred years, very slow at its birth, very fast at its disappearance.

We remember it as one bad thing, even with some sentimental remembrances, but the same could be said about colleges.

Surely it has been an important way to enable holidays for all, and encourage mass tourism.

The phenomenon lost its opportunity to become a source of educational knowledge and interplay with other people and with the environment.

Stereotypic judgments see the organization as a prison, and effectively, as in prisons, boarders become aggressive towards one other.

Socially damaging for that time was a system in which a lot of money has been spent for vacation, at the same time during which not enough schools were offered to the population, and when poor children attended only two or three years of school.

Certainly the system has been organized for poor infirm people, but the solution should have gone into the roots of the illnesses, or it would have been necessary to nurse a malnourished population with sound food. Certainly healthy climate is important, but in addition to a sound style of life.

The Italian State wasn't able in the past to give the entire population what needed, but it tried to offer to the poor an aspect of what the elite class enjoys, and in this way it was forecasting the future development of Italian tourism.

Even Cipolla (2004: 32) states that more than 1000 children were hosted in one turn, but usually they were in groups of a few hundred.

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## About the Author :



I am currently working as a Senior Lecturer at the Tourism Studies Department, Faculty of Tourism and Hotel Management, Suez Canal University, Ismailia, Egypt. I obtained my MA from London Metropolitan University in 1998. The course was titled International Tourism Policy, where my thesis was focused on the marketing practices undertaken by the NTOs to create, diversify and correct destination images. While the PhD, was focusing on designing a model for Repositioning Destination Images driven from evaluating the managerial policies adopted by the Egyptian Tourism Authority in order to reposition the cultural tourist image of Egypt. I got my PhD from the University of Bedfordshire, UK in 2004.

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