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Creating Tourism Knowledge

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CREATING TOURISM KNOWLEDGE

A SELECTION OF PAPERS FROM CAUTHE 2004

EDITORS:
Chris Cooper
Charles Arcodia
David Solnet
Michelle Whitford

CAUTHE
Council for Australian University Tourism and Hospitality Education Inc

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Chapter 1

Introduction

By Chris Cooper, Charles Arcodia, David Solnet and Michelle Whitford

This book comprises a selection of papers from the 2004 Council for Australian Tourism and Hospitality Education (CAUTHE) conference. As such it represents a permanent record of the best of the papers submitted to the 2004 CAUTHE conference and reflects the high level of scholarship and research in the field. The book also is symbolic of the partnership between CAUTHE, the Cooperative Research Centre for Sustainable Tourism and the University of Queensland. CAUTHE was established in 1992 with the aim of promoting the development of tourism and hospitality education and research in Australia. Since its establishment, the CAUTHE annual conference has become the major academic tourism and hospitality conference in the Southern Hemisphere, attracting high quality papers from Australian and international delegates, as this book demonstrates. The annual CAUTHE conference is designed to bring together tourism and hospitality professionals to promote informative, stimulating and challenging discussion on cutting edge issues in the field. In addition, innovations in research methodology and leading edge issues are discussed.

The strength of tourism and hospitality research in Australia was boosted with the formation of the Cooperative Research Centre for Sustainable Tourism (STCRC) in 1997. In 2002, the STCRC was refunded for a further seven years with considerable government support. The STCRC was created to underpin the development of a dynamic, internationally competitive and sustainable tourism industry. It is a not-for-profit company owned by its university, industry and government partners. The mission of the STCRC is the development and management of intellectual property to deliver innovation to the tourism sector within Australia and to enhance the environmental, economic and social sustainability of the tourism industry. The STCRC has worked closely with CAUTHE since its establishment and there is now an effective and fruitful partnership between the two organisations, which has lifted the level of tourism and hospitality research in Australia. This is evidenced by the fact that the STCRC has sponsored this book and organised its publication.

The final partner in this volume is the University of Queensland's School of Tourism and Leisure Management. The School is one of the oldest and most research active tourism and hospitality schools in Australia and hosted the 2004 CAUTHE conference. The conference committee from the School organised the refereeing of the conference papers and invited referees to nominate the best papers submitted to the conference. As a result of the refereeing process, 11 papers were identified for inclusion in this book and two of these were awarded "best paper". The paper by Dean Carson and Kim Adams on "Strategic knowledge management in tourism" was awarded best overall paper in the conference. It is significant that this paper closely reflected the theme of the conference – *Creating Tourism Knowledge*, a testament to the growing interest in knowledge management and tourism. Indeed, three of the papers in this book relate to that theme. The other papers in the book focus on tourism and hospitality education, marketing and consumer behaviour, and hospitality management. We are grateful to the anonymous referees for their assistance in the double blind peer reviewed processes for selecting these papers and to the STCRC for their sponsorship of this book. All the papers from the 2004 CAUTHE conference are available on a CD Rom.

Part 1

Knowledge Management

Chapter 2

Strategic Knowledge Management in Tourism

Effectiveness and Constraints

By Dean Carson & Kim Adams

Abstract

Visitor Information Centres (VICs) play an important role in the distribution of regional tourism product through: display of promotional information about products, services, and attractions; serving as a point of contact for potential visitors and visitors in the destination; booking product; and liaising with tourism operators in the development of promotions and packages. VICs in regional Australia may be operated under a number of management and funding models, but these usually include some direct financial contribution from local government or regional tourism organisations. Recent increased attention to the performance of VICs has included implementation of accreditation schemes and growing pressure to report to funding agents and industry on a range of performance indicators.

This paper argues that Strategic Knowledge Management principles may be applied to improve the functioning and reporting capabilities of VICs. The capacity to implement Strategic Knowledge Management (SKM) in VICs is not well understood, and may be influenced by: the rate of change in VIC roles and responsibilities over the past ten years; the range of external stakeholders associated with VICs; the difficulties in providing professional development to casual, part-time and volunteer staff; and the relative isolation of local tourism associations in many parts of regional Australia.

A case study was conducted at the Echo Point VIC situated in the Blue Mountains, New South Wales, to analyse SKM capacity issues. The centre was analysed in terms of the extent to which: leadership; culture; infrastructure; technology; and continuous improvement practices were conducive to developing and implementing a knowledge strategy. It was recognised that the language of knowledge management has yet to influence the operation of VICs, however the principles appear particularly relevant to this environment where information collection, collation, distribution and organisational knowledge are central to effective performance. The research includes a tool for assessing the SKM capacity of Visitor Information Centres, which may assist in introducing new practices and structures.

Introduction

Knowledge management (KM) can be thought of as:

> A multidisciplinary approach to achieving organisational objectives by making the best use of knowledge. [Knowledge management] focuses on processes such as the sharing, acquisition, and creation of knowledge and the cultural and technical

foundations that support them. Its goal is to align knowledge processes with organisational objectives (Andrews; 2002a).

Much of the knowledge management literature has focused on the practice of knowledge management and, in particular, the use of information and communication technologies to facilitate knowledge management (Beckman, 1999). It has become clear that organisations may take a variety of approaches to implementing knowledge management, and that various approaches may be more or less successful in different kinds of organisations (Liebowitz and Beckman, 1998). Sveiby (2001) suggests that a knowledge strategy requires a systematic assessment of the internal and external networks of an organisation. He further acknowledges that this process can be instigated by addressing a number of strategic questions to determine an organisation's knowledge structures, therefore enabling the development of a coordinated strategy.

Table 1

Knowledge Structures

Knowledge Structures	Strategic Questions to be addressed
Between individuals	How can we improve the transfer of competence between people in our organisation?
From individuals to external structures	How can the organisation's employees improve the competence of customers, suppliers and other stakeholders?
From external structures to individuals	How can the organisation's customers, suppliers and other stakeholders improve the competence of the employees?
From individual competence to internal structure	How can we improve the conversion of individually held competence to systems, tools and templates?
From internal structure to individual competence	How can we improve individuals' competence by using systems, tools and templates?
Within the external structure	How can we enable conversations among customers, suppliers and other stakeholders so they improve their competence?
From external to internal structure	How can competence of customers, suppliers and other stakeholders improve the organisation's systems, tools and processes and products?
From internal to external structure	How can the organisation's systems, tools, processes and products improve the competence of customers, suppliers and other stakeholders?
Within the internal structure	How can the organisation's systems, tools, processes and products be effectively integrated?

(Sveiby, 2001:346-347)

Before the implementation of specific practices, however, the capacity of organisations to implement a Strategic Knowledge Management agenda needs to be assessed. Strategic Knowledge Management (SKM) represents the attempt by organisations to improve their overall capacity for knowledge. The literature suggests that this capacity may be dependent on: leadership; culture; infrastructure; technology; and an acceptance of the need for continuous improvement (Andrews, 2002b).

Leadership sets the context and direction for an organisation's KM initiatives (Andrews, 2002b). The remaining four elements (culture, infrastructure, technology and continuous improvement) address the people, process and technology issues. Organisations that understand their performance against the five elements are likely to be better placed to implement structured and cohesive KM practices. This research was concerned with the capacity for Visitor Information Centres (VICs) to manipulate the five critical elements of SKM to assist them in improved performance. The research is not an analysis of the nature of knowledge management in VICs, but of the influences on VICs' capacity to implement a Strategic Knowledge Management agenda.

The distribution of tourism product is an information intensive activity. Visitor Information Centres and other visitor services agencies must be particularly aware of the need to collect, collate, store, and provide information efficiently and effectively.

There has been little research into Visitor Information Centres in Australia. This is surprising, given their prominent role, particularly at a local level (Dredge, 2001).

The research to date has been concentrated in three main areas. A number of studies have been carried out at the general structural level, including Dredge's (2001) work which analysed the historical development of local government involvement in tourism. Carson, Beattie and Gove (2002) appraised the structures of local government in terms of their role in sustainable tourism management, while Jenkins (2000) and Tonge et al (1995) investigated the relationships between local government and regional tourism organisations.

Research examining personnel issues include McKercher (1996) and Ritchie (1997) on the profile of local government tourism managers. These studies identified the local government tourism environment as highly volatile, typified by high staff turnover and low levels of formal qualifications. In a similar vein, Tait, Richins and Hanlon (1993), conducted a study on the management training knowledge and skill priorities of sport, recreation and tourism managers.

A small body of research has examined the various products and services offered by VICs. This body of knowledge includes two consultancies carried out in NSW and QLD which looked at the services that VICs offered, and the effect on subsequent traveller decisions (TSDS & Kerridge, 1998; Queensland Tourist & Travel Corporation, 1999). Hobbins (1999) analysed the impact of VICs on traveller decisions and expenditure, while the Fallon and Kriwoken (2002) evaluative report on the Straghan VIC looked at its use, to determine the effectiveness and sustainability of future VIC developments. To date, there has been no research on the ability of VICs to deliver timely and useful information and knowledge to its customers.

As the literature suggests, VICs may operate under a number of management models, the most common of which is direct investment by local government, or by local and state government through regional tourism organisations (RTOs). Jenkins (2000) suggested that the reduced role of central government in economic development strategies has been a major factor in the creation of the new economic and entrepreneurial roles for local governments. Tourism has become an area in which local government has invested, and Visitor Information Centres are one manifestation of that investment (Carson, Beattie and Gove, 2002). While VICs may have a variety of functions, their core role is to provide information about local tourism products and services to visitors in the destination.

The New South Wales (Australia) tourism strategy claimed that VICs boosted visitor spending by $57 million a year through encouraging people to stay longer and visit more attractions (Aurora, 1998). This mirrors substantial research carried out in the United States, which suggested that such centres have a positive influence on tourist length of stay and expenditures (Tierney, 1993; Fesenmaier and Vogt, 1993), and travel behaviour (Fesenmaier, Vogt, and Stewart, 1993). Similar findings have been published in Australian by Hobbins (1999). Therefore, the continued development of tourism as an economic generator in regional Australia has some dependency on VICs and their expertise in imparting information to tourists.

VICs perform their information provision roles through a complex set of relationships with: tourism businesses; public sector agencies; industry associations; travel agencies and other intermediaries; and visitor groups and individual visitors. Information which emerges from these relationships may be highly codified (making it relatively easy to distribute), or tacit. It may be relevant to a wide range of audiences, or specific to a smaller range. It may come from a single source, or may represent an accumulation of data from many sources. Even within a Visitor Information Centre, information may have been transmitted to all personnel, or to only some staff. The information which is ultimately provided to visitors emerges from a complex process of iterative learning (Malmberg and Maskell, 1997). Information provision – content, placement, method of delivery and so on – is determined both by what the VIC knows about the products and services they promote and the intentions of information seekers.

Programmes, processes and technologies have been developed to assist VICs in performing their information distribution functions. Internationally, these include: accreditation schemes; support networks; and information and communication technologies, including online technologies. In New South Wales, VICs achieve accreditation through a Visitor Information Network (VIN), which was set up and operated by the Council of Tourism Associations (CTA) in 1999, to enhance and strengthen communications between VICs and tourist operators, and provide a focal point for industry networking, marketing and professional development (Aurora, 1998). In 2001 Aurora Practical Solutions was appointed by Tourism NSW to further develop the NSW Accredited Visitor Information Network, and in 2003 was successful in bringing NSW into line with national standards. The national network exists to ensure the delivery of a high standard of service in the provision of reliable and readily accessible information to visitors, residents and the travelling public. It has developed a framework for professional management and operation of VICs nationwide, together with strong brand recognition and a demonstrable commitment to attracting visitors to regional Australia (Pers. Comm: Aurora, 2003).

The environment in which VICs operate is additionally influenced by funding arrangements and structures. There is no universal arrangement. VICs attract various proportions of their income from: local government grants; regional tourism organisation funding; operator subscriptions; commissions on bookings; and sales of souvenirs, maps, guides and so on. Few VICs operate entirely free of public sector funding, and most have management boards or committees with representation from private and public sectors. VICs therefore, not only provide a conduit for information from tourism organisations to visitors, but have a range of reporting responsibilities tied to accreditation, funding, and the Visitor Information Network.

The development of state and national accreditation standards, and a drive from key funding agents to have these standards adopted, has led to increasing focus not only on the roles and responsibilities of VICs, but on how they organise themselves with regard to those roles and responsibilities. While the literature in this area has yet to adopt the language of knowledge management, it seems reasonable that the principles of knowledge management are particularly apt for VICs. Knowledge management is concerned with the maintenance of knowledge capital within an organisation or network of organisations (Beckman, 1999). Knowledge comes to be as a result of the processing of data and information. While many organisations are increasingly reliant on sharing knowledge internally and with external stakeholders, the diversity, geographical dispersion, and interrelationships of tourism organisations (Leiper, 1995), and the fact that information is a key component of the tourism product itself (Sheldon, 1997) suggest that tourism should benefit from improved knowledge management practices. Within the tourism systems, VICs engage in information intensive activities and may particularly benefit through employing knowledge management.

The intention of this research was to investigate the extent to which a strategic knowledge management agenda had been adopted in a specific Visitor Information Centre. In particular, the research examined:

- the leadership approach to managing a complex information environment;
- the organisational culture and its influences on iterative learning and information sharing;
- the constraints on Strategic Knowledge Management brought about by the infrastructure of policies, processes and regulation;
- the use of information and communication technology to manage knowledge processes; and
- the knowledge management implications of accreditation, reporting, and other activities aimed at fostering continuous improvement.

The research was conducted at the Echo Point Visitor Information Centre in New South Wales.

Conceptual Framework

Trussler (1998; cited in Andrews, 2002b), and later Andrews (2002b) developed a knowledge strategy framework, which attempted to define the aspects of organisations which could be manipulated to enhance knowledge management capacity. Figure 1 depicts the framework. The framework identifies the five key components of successful knowledge management (the “success factors”), and the organisational considerations (“components”) for realising these success factors. The Trussler/Andrews model has been accepted as a starting point for the purposes of this research. Assessing the status of an organisation in relation to the Trussler/Andrews model requires an operationalisation of Figure 1.

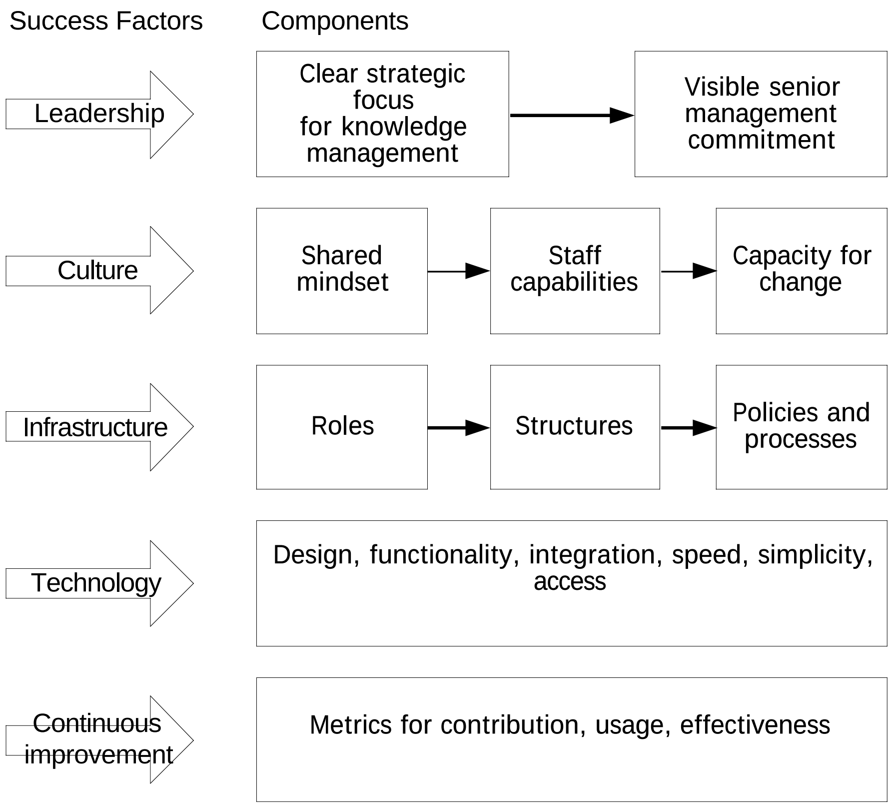

Figure 1
A knowledge strategy framework (Andrews, 2002 – Adapted from Trussler, 1998).

Assessment Instrument

A number of researchers have focused on various aspects relating to the knowledge strategy framework in Figure 1, and a general guide to assessing Strategic Knowledge Management may be developed from this literature. The guide takes the form of a series of checklist items. These items provide qualitative views on the extent to which an organisation is able to address its knowledge structures. Table 2 summarises the Strategic Knowledge Management Assessment Instrument. It is important to recognise that the instrument at this level is a generic one, and may be applied to any organisation. The case study conducted for this research will allow the instrument to be tailored more specifically for Visitor Information Centres.

Table 2

The strategic knowledge management assessment instrument.

Success Factors and Components	Themes covered in checklist
LEADERSHIP	
Clear strategic focus for KM	Strategic management – Hubbard (2000). Knowledge as a critical factor in organisational competitiveness – Zack (1999); Sveiby (2001); Bollinger and Smith (2001), Tissen, Andriessen and Lekanne Deprez (2000); and Andrews (2002).
Visible Senior management commitment	Management commitment to strategic processes and communication to stakeholders – Andrews (2002); Wigg (1999); Tissen, Andriessen and Lekanne Deprez (2000); Byrman (1991); Carlopio, Andrewartha and Armstrong (2001); Sarros and Butchatsky (1998).
CULTURE	
Shared mindset	Collectively held and sanctioned definitions such as philosophies, values, beliefs, work systems and practices – Nankervis, Compton and McCarthy (1999); Trompenaars (1993); Schein (1994); Gabriel (1999); Hubbard (2000); Desimone, Werner and Harris (2002), Dolan and Garcia (2002); Ogbonna and Harris (2002). Continuous learning culture – Senge (1990); and Hall (2001); McDermott and O'Dell (2001); Tissen, Andriessen and Lekanne Deprez (2000).
Staff capabilities	Improvement of employee capabilities through recruitment, training, performance appraisal, career development, motivation and rewards systems – Desimone, Werner and Harris (2002); Nankervis, Compton and McCarthy (1999); Mukhi, Hampton and Barnwell (1990), Limerick and Cunnington (1993); Hubbard (2000); and Quinn et al (1996). Continuous learning capabilities – Marquardt (1996); and Burns (1995).
Capacity for change	Processes and procedures to encourage organisational and individual capacity for change – Gretzel (1999); Strom and Wallace (2003), Brewer (1995); Wilson (1996); Dunphy and Stace (1990); and Cacioppe (1997).
INFRASTRUCTURE	
Roles, structures, policies and processes	A knowledge enhancing infrastructure that supports collaboration and cooperation to achieve transference of knowledge between individuals and groups, both internally and to the external environment – Mintzberg (1995); Hubbard (2000); Hansen (1999); Sveiby (2001), Peters (1991).
TECHNOLOGY	
Design, functionality, integration, speed, simplicity, access	Development and maintenance of technological systems to improve coordination, decision-making and planning. Specifically:- KM Systems – Bair and O'Connor (1998); Lin, Hung, Wu and Lin (2002); Beckman (1999); and Bhatt (2002). Tourism Systems – Sheldon (1997); Frew (2000); Buhalis (1999); and Baker and Sussmann (1999)
CONTINUOUS IMPROVEMENT	
Metrics for contribution, usage, effectiveness	Core processes for continuous improvement within the organisation for sustainability of all stakeholders – Chapman and Hyland (2000); Hyland, Mellor, O'Mara and Kondepudi (2000).

Methods

A case study was conducted in which the assessment instrument was applied. The case study was conducted at the Echo Point Visitor Information Centre, which forms part of the Blue Mountains Tourism Authority (BMTA) in New South Wales. A case study approach was adopted because it enabled a detailed investigation of a single organisation, with a view to providing an analysis of the context and processes involved in the phenomenon under study (Cassell and Symon, 1994:209). The case study included analysis of documentation provided by the VIC and key stakeholders (including annual reports, business plans, position descriptions etc.), and interviews with stakeholders. Interviews were conducted with:

- Regional Tourism Organisation Manager and Marketing Manager
- Visitor Information Centre Manager
- Staff members of the VIC
- The VICs Telephone Enquiry Centre Staff

The interviews were semi-structured and explored the checklist items from the Strategic Knowledge Management Assessment Instrument.

The following set of documents were analysed, again using the instrument to guide thematic analysis:

- NSW State Government Accreditation Scheme for VICs
- Strategic, Management and Business plans
- Vision and Mission Statements
- Organisational Charts
- Duty Statements
- Policy and Procedural Manuals
- Computer Systems Manual
- Written communications to stakeholders

The analysis of documentation enabled comments to be made about the extent to which SKM components were explicitly identified and recorded in the organisation, while the interviews focused on the extent to which stakeholders perceived these components to be enacted.

Results

Leadership

Results from the leadership elements in the Trussler/Andrews model (2002) highlighted that the Echo Point VIC has a standing business plan, which is linked to the BMTA business and marketing plan, which then flows to Blue Mountains Tourism Regional Strategy. All plans are linked through specific objectives and key result areas. Each plan has been developed through an iterative process involving staff and regional stakeholders, ensuring value issues are addressed for all stakeholders, while still focusing on customer satisfaction. The strategy development process includes analysis of the past, present and future environmental climate, including changes in market share, leadership, players, market shifts, costs, pricing and competition, ensuring strategies are consistent with external demands. This process also addresses the requirements of the organisation to achieve success, identifying the capabilities needed to carry out the strategies. However, its failure to specifically address knowledge issues highlights the absence of clear links to strategies aimed at the development and use of knowledge within the organisation.

The leadership style in evidence was supportive of new initiatives, providing information on wider organisational issues, but allowing the day-to-day operations to be managed by the team. Key managers within the BMTA and the Echo Point VIC could articulate the future directions of the organisation and relate these to day-to-day activities. However, Echo Point staff were not fully conversant with issues at the higher strategic level and suggested the irregular communication between the City Council and the Centre was the determinant of this constraint. Leadership style and structures are in place, however there is an absence of a KM focus.

Other leadership initiatives that promoted the transfer of knowledge between stakeholders included:

- Regular BMTA board meetings with regional members to enhance the transfer of information and knowledge
- Industry partnerships

- Combined marketing initiatives of the region enabling connectivity between the BMTA and tourism providers

Culture

Supportive management has led to a culture that promotes excellent teamwork and greater ownership of work and service quality. The team environment has been achieved in part through open communication and a focus on the individual expertise that each member brings to the Echo Point VIC, together with the responsibility and power to customise the service for tourist needs. This has been enhanced by an ongoing commitment by staff to further their awareness of regional products and activities. A shared mindset is clearly in evidence at Echo Point.

Staff capabilities are maintained and improved within the Echo Point VIC through a series of formal and informal processes. Formal processes include recruitment strategies that support the culture and work ethics of the existing team and optimise team dynamics and broaden the individual areas of expertise. The Centre also carries out induction programmes for new staff, formal job rotation between different VICs and the Booking Centre within the BMTA, a mentoring program, and quarterly staff meetings. There is also in place a performance appraisal system which identifies new/additional training and development requirements and reports on performance against set criteria. Informally, all staff members have a long association within the region and have a wealth of knowledge and experience to bring to their work environment. There are formal procedures in place to capture this rich knowledge and share it amongst staff members at other Centres. However, one identified constraint to enhancing staff capability was the absence of any evidence of a rewards/motivational system in place for achievement beyond organisational expectations. Staff capabilities support the transfer of knowledge within the Echo Point VIC.

Change management was perceived by staff at the Echo Point VIC as one of their weaknesses. While management and staff seemingly enjoyed open communication channels, document analysis identified a lack of ongoing direction and focus combined with poor communication for change; lack of preparation for change; and a lack of ongoing training and development to successfully achieve organisational change. On an individual level there was staff resistance to change. There is a perceived low capacity for organisational change within the Echo Point VIC.

Infrastructure

The BMTA has a flat profile consisting of four autonomous units, which produce dedicated tourism products. There are two VICs (of which Echo Point VIC is one), an accommodation/tour booking and information call centre, and a destination marketing section. This allows staff to deliver a professional level of service to meet the individual needs of stakeholders. A standardised level of service is also achieved through a full complement of paid staff, clearly stated roles and responsibilities, training, and the development of and adherence to procedures manuals. Improvements have also been undertaken within the physical infrastructure at Echo Point to streamline service provision to retail customers and those customers seeking tourist information. However, two constraints were revealed within the existing infrastructure. Firstly, it was identified that there was sometimes a conflict between information provision/retail functions within the Echo Point VIC. Secondly, due to geographical separation and autonomy from the City Council, communication channels were shown to be impaired. Existing policies, processes and regulations in place within the Echo Point VIC can be seen as supportive of collaboration and cooperation between autonomous units to achieve transference of knowledge.

Technology

The current technological systems available within the BMTA are distributed across the four autonomous units, with the Call Centre operating a bookings information system, and the VICs operating two personal computers (PCs) each. Echo Point VIC utilised one dedicated PC for the Centre Manager who used this system for email correspondence, updating a database of product information, and financial spreadsheets. The second PC is located on the shop floor and is dedicated to staff email access and Internet access to retrieve regional and product information when required. Currently Echo Point has a manual system for notifying the Call Centre of accommodation bookings taken within the Centre. Interviews identified that there were embedded methods for storage and exchange of information and knowledge through electronic database and email.

Constraints on the current system include restricted Internet/Intranet access within Echo Point VIC, no separate Internet/intranet access for staff, and a cumbersome system for processing accommodation bookings. However, the BMTA Manager has championed the development of a fully integrated bookings system for access between all autonomous units. Current status of development includes evaluation of new technologies to determine appropriateness. Adequate technology is available for capture, storage and dissemination of knowledge within Echo Point, however improved access, training and further development are required to fully utilise the potential in managing the Centre's knowledge.

Continuous improvement

The BMTA Regional Strategy encapsulates nine objectives for incremental implementation over a period of three years. Each objective addresses continuous improvement of tourism products and support for initiatives within the region. These include:

- Increasing domestic visitor nights
- Increasing international overnight stays
- Improving regional website
- Identifying product deficiencies and implementing development
- Professional development of industry operators
- Improve and facilitate good communication with and between members
- Increase regional membership, particularly partnership development
- Branding and repositioning of region
- Continual development of three year Regional Tourism Strategy

Stakeholder involvement in the development of these strategies suggests that the BMTA has the ability to work effectively across internal divisions and external boundaries, and values the continual appraisal and development of its products, its regional partnerships, and the effective direction and operation of the organisation. The BMTA has the capability for continuous improvement, driven at the strategic level and operationalised through accreditation guidelines, key result areas and performance appraisal, training and development.

Discussion

Analysis of the Strategic Knowledge Management status of the Echo Point VIC revealed the overall robustness of the model proposed by Trussler and Andrews in identifying the capacity for knowledge management in the organisation. Stakeholder interviews in particular showed that the components of the model were considered important and relevant to the operation of the centre. The Trussler/Andrews framework was useful for the assessment task, however it failed to account for the very substantial role played by external agencies in the direct management of the Visitor Information Centre. While formal knowledge management practices were documented, it was often the responsibility of external agencies to ensure that practices actually occurred. For example, the apparent commitment of senior managers to using these practices was influenced by demands from funding agencies, operators, members, the local government, regional tourism organisations, and visitors.

In the Trussler/Andrews framework, it is leadership from within the organisation which is seen as having the largest role in manipulating organisation components to improve knowledge management practices. The degree to which an intermediary agency such as a VIC can be influenced by the external environment appears greater than has been suggested in the literature pertaining to more product manufacture oriented organisations. The extent to which this factor constrained the performance of the Echo Point VIC was highlighted by staff perceptions that change, while often necessary, was difficult to achieve. In cases where changes were implemented, they were not well managed. The recognition that the external environment was highly dynamic and influential was reflected in the frequency of meetings and communications designed to manage relationships between VIC staff and representatives of the environment.

There was a strong reliance on iterative learning to support the knowledge structures in the Echo Point VIC. This reflected not only the relative influence of the external environment, but also the tacit nature of much of the knowledge that was deemed important by stakeholders. Information provision – content, placement, method of delivery and so on – is determined both by what the VIC knows about the products and services they promote and the information seekers. Matching the expectations of one group to another, and accounting for the changing external environment (for example, an unpredicted downturn in mid-week international visitors on day trips which resulted from the SARS scare and Iraq war) in managing information provision was determined to be very difficult to codify.

The Echo Point VIC and its surrounding BMTA infrastructure, may be expected to represent a highly capable knowledge management organisation relative to other VICs. Interviews established that Echo Point was well resourced (financially, through infrastructure, and through technology) and was able to address many of the issues perceived as facing VICs generally, either through avoidance or direct management.

Conclusions and Implications

There are substantial constraints on the capacity for Visitor Information Centres to develop and implement a Strategic Knowledge Management agenda internally. These constraints largely emerge from the complexity of the environment in which VICs operate. The management agenda is heavily influenced by the expectations and practices of external stakeholders, funding agents and other peripheral organisations.

The existing SKM Framework adopted from Trussler and Andrews does not adequately account for the influence of external organisations, and the assessment tool subsequently requires revision. In particular, the expectation in the Framework is that leadership and organisational culture emerge from within the organisation, and that decisions on the key policy infrastructure are also internally driven.

The adoption of a Strategic Knowledge Management agenda by organisations such as Visitor Information Centres requires commitment from within the organisation and from its key external stakeholders. The checklist focuses on internal management, and will need to include items describing the relationship between the organisation and its external environments. In particular, these items should relate to the extent to which external organizations, which directly influence the VIC management agenda, accept the principles of knowledge management. The leadership, culture, and infrastructure elements of the assessment instrument could be extended to consider the "knowledge structures" identified by Sveiby (2001), which are set out in Table 1.

The assessment instrument employed in this research was very sound in its examination of structures: between individuals; from individuals to external structures; from individual competence to internal structure; from internal structure to individual competence; from internal to external structure; and within the internal structure. It was less able to identify the constraints and practices associated with external influences on the organisation.

Despite this limitation, the research was able to identify the recognition of the external environment as a significant enabler of Strategic Knowledge Management in the case study Visitor Information Centre. The research also demonstrated that the principles of SKM, as encapsulated in the assessment instrument, were relevant and important. The research highlighted some of the ways in which Visitor Information Centres may engage in learning, and the value of learning for management and staff. The assessment instrument provides a benchmarking tool for Visitor Information Centres generally to identify their capacity for organisational learning and knowledge management. Future research may be focused on implementation of the instrument across a number of Visitor Information Centres to ascertain the degree to which different structures (including funding, operations, management, and accreditation) are associated with different knowledge management strategies.

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Chapter 3

Multi-Level Complexity in the Management of Collaborative Tourism Research Settings

A Prescriptive Model

By Lisa Beesley

Abstract

In a knowledge-based economy (that emphasises the benefits of industry/government and academic research), a strong research base must underpin management of a tourist destination if it is to realise its full potential. The establishment of collaborative networks between industry, academia, and government in the strategic planning and management of tourist destinations is becoming increasingly popular. If knowledge is to drive innovation and economic growth optimally, it is important to develop an understanding of the processes underlying the creation, diffusion and utilisation of knowledge in cooperative research settings, and the relationships between them, but how this might translate into management practices that would optimise the utility of knowledge created in such settings. Accordingly, the aim of this paper is to examine the relationships between knowledge creation, diffusion and utilisation in collaborative research settings, and in so doing, present a model identifying the most efficient means of formulating and disseminating research designed for organisational application.

Tourism has come to be recognised as a major contributor to national economies. The recent Green Paper put forth by the Australian government (DITR, 2003) emphasises the importance of tourism in stating that '... a healthy tourism sector contributes to the economic and social well-being of all Australians'. In Australia, tourism comprises 4.7% of the Gross Domestic Product (GDP) and directly employs 551,000 people (DITR, 2003; Hockey, 2002). Additionally, it has been recognised that a strong research base is needed to underpin the management of a tourist destination if that destination is to realise its full potential (DITR, 2003; Innes, 1996; van den Heijden, 1997).

A popular means of developing such a research base has been for industry and government stakeholders to collaborate with academic researchers to produce research that might guide the planning and management of a destination (Chrislip & Larson, 1994; Healey, 1998; Helling, 1998; Innes & Boohar, 1999). Tri-lateral research arrangements (industry, government and academic research) are commonly referred to as cooperative or collaborative research settings. They represent a paradigm by which nations might participate more effectively in a knowledge-based economy. The popularity of these collaborative research undertakings belies the fact that, until recently, the ways in which the underlying processes facilitate or inhibit eventual outcomes remained poorly understood.

If knowledge is to drive innovation and economic growth optimally, it is important not just to develop an understanding of the processes underlying the creation, diffusion and utilisation of knowledge in cooperative research settings, and the relationships between them, but how this might translate into management practices that would optimise the utility of knowledge created in such settings. Accordingly, the aim of this paper is to examine these relationships with a view to identifying the most efficient means for formulating and disseminating research designed for organisational application.

In order to identify and better understand how knowledge emerging in tri-lateral arrangements of knowledge production moves through to eventual utilisation, it is important to acknowledge the acquisition and utilisation of knowledge at individual, group, organisational, and inter-organisational levels. From this perspective it is then possible to identify the relationships between knowledge creation, diffusion, and utilisation, not just within each level of analysis, but the relationships that might also exist *among* those levels (Beesley, 2002a). Additionally, this comprehensive approach makes it possible to recognise the dynamics occurring in a collaborative research setting, and the influence such dynamics might have on the eventual utilisation of the research findings produced in such settings. As collaborative research undertakings are an emergent form of scientific knowledge production, there is little in the literature to inform our understanding of how knowledge moves through such settings – from its point of creation, though to its eventual utilisation. Contributions to the understanding of this process have been through evaluative outcomes based research conducted in hindsight (Bramwell & Sharman, 1999; Helling, 1998). In these studies, data was obtained retrospectively through either stakeholder interviews (Bramwell & Sharman, 1999) or surveys (Helling, 1998). A difficulty with retrospective research is that it is open to the possibility that respondents will reinterpret the past in light of the present (Babbie, 1992; de Vaus, 1995). Additionally, much of the research investigating the processes by which knowledge is acquired by individuals or groups has been carried out in experimental conditions, which may not reflect the dynamics of these processes occurring *in situ*.

Recent research, based on the findings of a three-year qualitative investigation of a collaborative research project has deepened current understandings of the ways in which knowledge moves within collaborative research settings (Beesley, 2002a, 2002b, 2003a, 2003b). The project under investigation provided an ideal context in which to develop an understanding of the dynamics of a collaborative tourism research project as they occur *in situ*, and evolve over time, and to identify management processes that might most efficiently blend research with practice. The aim of this paper is to present the practical implications of the theories developed through this research. Accordingly, this paper presents a brief overview of theoretical perspectives underpinning the practical applications best thought to enhance the movement and eventual uptake of knowledge emerging through collaborative research settings – knowledge that is designed for organisational application. To fully appreciate the dynamics occurring within these collaborative research settings, it is first necessary to understand collaborative research undertakings as a paradigm by which nations might participate more effectively in a knowledge-based economy. These tri-lateral arrangements of knowledge production are sometimes described as triple helix arrangements. The Triple Helix model (Leydesdorff, 2000; Leydesdorff & Etzkowitz, 1996) has recently been offered as a means to better understand the dynamics occurring in collaborative research arrangements.

Tri-Lateral Arrangements of Knowledge Production

The Triple Helix model (Leydesdorff, 2000) concentrates on the network overlay of communications that reshape the institutional arrangements among researchers, industries and governments. This model describes how a new knowledge infrastructure is generated in terms of overlapping institutional spheres, with hybrid organisations emerging at the interfaces (see Figure 1).

Figure 1
The triple-helix model indicating the overlapping institutional spheres of industry, government and academic research groups (Etzkowitz & Leydesdorff, 2000).

The aggregated relationships within the triple helix spawn interactive offshoots of intentions, strategies, and projects. In turn, this creates added value by constantly reorganising and synthesising the institutional infrastructures in order to achieve at the least, outcomes adjacent to the goals. These interactive offshoots transform through relationships among actors within the triple helix. This suggests that the process of knowledge production in collaborative arrangements is anything but linear. In spite of the fact that little has been known about the ways that the dynamics of cooperative research settings influence the eventual production of knowledge, the perception that collaborative research will make important contributions to a knowledge-based economy continues to gain momentum (Etzkowitz & Webster, 1998). In one form or another, most countries and regions are trying to attain some form of Triple Helix in order to drive productivity and economic growth (Beesley, 2003c; Etzkowitz & Leydesdorff, 2000). The common aim among them is to achieve an innovative environment consisting of tri-lateral initiatives for knowledge-based economic development, and strategic alliances among industry, government and academic research groups. These co-operative arrangements are often encouraged (but not necessarily controlled) by government – either through new policy or funding, whether directly or indirectly. In spite of broad acknowledgement of the complex dynamics found within these collaborative tri-lateral arrangements, there remains the expectation that research will produce knowledge that is of immediate use to industry, which in turn will promote economies. The underlying assumption is that research generated in this sequential order will have direct and immediate applicability and will be used for problem solving (DIST, 1995; Slatyer, 1990, 1993; Stocker, 1997).

While this is the expectation, the literature shows that research designed for organisational application is infrequently utilised in such a direct fashion (Hubbard & Ottoson, 1997; Knorr-Cetina, 1981; Shove & Simmons, 1997; Weiss, 1980, 1978). Furthermore, although the model of collaborative research (encouraged and supported by Australian Federal science policy) is frequently cited as a benchmark in tri-lateral arrangements of science to be aspired to (DEST, 2002), early research into Australian university-industry collaborations (Mann, Chatfield, Bain, & Pirola-Merlo, 1996) showed that many of these collaborative ventures failed to fulfil the expectations of participants, leading to some major disappointments in venture outcomes. Therefore, research that endeavours to identify the factors that more or less influence the utilisation of knowledge promises to identify "best practices" that subsequently may increase the pecuniary and social return on research investment. Although the concept of a Triple Helix system (Leydesdorff, 2000; Leydesdorff & Etzkowitz, 1996) acknowledges the dynamics of this evolving knowledge-based economy, it fails to adequately describe knowledge acquisition in collaborative settings across individual, group, organisational and inter-organisational levels.

Theoretical Underpinnings

Recent research findings have enabled the development of a theoretical framework identifying five common factors operating within and among the four levels of learning as previously mentioned. In order to appreciate the extent to which these factors influence the ways in which knowledge is managed, it is important first to acknowledge the interdependence among the four levels of learning. Figure 2 acknowledges not only the interrelatedness, but also interdependency among these levels of learning.

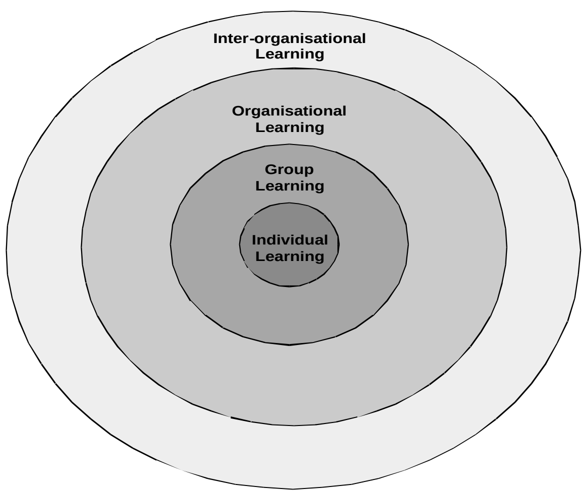

Figure 2
The interrelated levels of learning.

The order in which the concentric circles are embedded within each other is not to assign more importance to any one level over another, but rather, is intended to demonstrate the interdependent and symbiotic nature of knowledge acquisition. Recent research has shown that in a collaborative research setting, learning at one level cannot take place until it has occurred at the previous level; nor is it possible to understand the process of learning at one level until understanding of the process at a previous level has been attained (Beesley, 2003b, 2004, in press). However, given the dynamics that occur in knowledge acquisition across all levels, the relationship among these levels is not seen as linear, but rather as each level being nested within another. This depiction of learning levels provides the foundation on which to offer a theoretical explanation of the relationships among the creation, diffusion and utilisation of knowledge intended for organisational application. The common elements among this relationship can be classified as belonging to one of five variables that are mutually influential: social contingencies, communication processes, cognitive processes, affect and values. The manner in which these five factors relate is displayed in Figure 3.

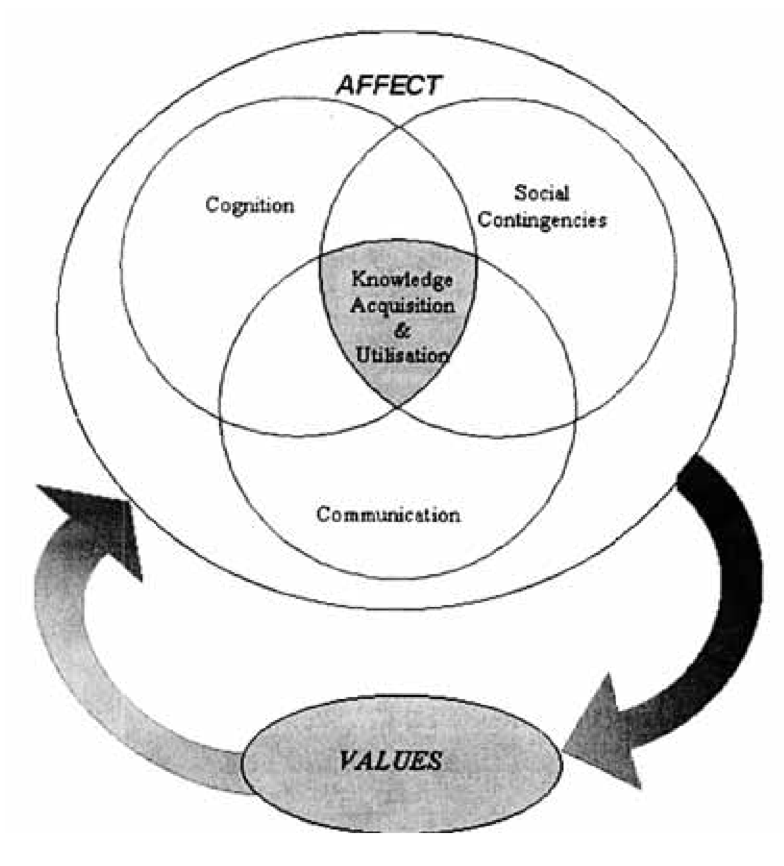

Figure 3
Model of factors influencing the acquisition, dissemination and utilisation of knowledge (Adapted from Beesley, in press).

As the figure shows, knowledge acquisition and subsequent utilisation nests within the simultaneous influences of cognitive, communication and social conditions. In this instance, cognition would encompass all the functionally different collectives of individual knowledge networks, as they operate in conjunction with personal experience and cognitive ability (see Eysenck and Keane, 2000 for a review). Social contingencies encompass concerns such as group think (Janis, 1982), group polarisation (Lamm, 1988; Lamm & Myers, 1978), relationship building (Seufert, von Krogh, & Bach, 1999), trust (Cvetkovich & Löfstedt, 1999; Fulop, 2002), social validation (Hinsz, 1990; Stasser, 1999), social structures (Nonaka, Toyama, & Nagata, 2000; Nooteboom, 1999; Seufert et al, 1999; von Krogh, Ichijo, & Nonaka, 2000), status (Cialdini & Trost, 1998), leadership (Barling, Slater, & Kelloway, 2000; Chrislip & Larson, 1994; Sogunro, 1998), power (Bendor, Moe, & Shotts, 2001), and of course, politics (Cohen & Olsen, 1975, 1976; Cohen, March, & Olsen, 1972; Lindblom, 1959, 1979; Simon, 1957). The third helix displayed in the model represents communication issues. This includes not only dissemination efforts (Backer, 1993; Caws, 1998; Goldberg, 1997; Knott & Wildavsky, 1980; Stocking, 1998), in whatever form that might take (Argarwal, 2002; Argyris & Schön, 1974, 1996; Halme, 2001; Michael, 1973), but also communication of affective states (Barsade, 2001; Barsade, Ward, Turner, & Sonnenfeld, 2000; Thompson, Levine, & Messick, 1999; Thompson, Nadler, & Kim, 1999) and the establishing of a common frame of reference, or attainment of mutual understanding (Augier, Sharig, & Vendele, 2001; Schuetz, 1962, 1964, 1967).

It is only when the influence of these three factors is acknowledged and managed effectively, depending on the situation and specific needs accordant to it, that there exists the potential for maximum knowledge gain. However, the degree to which knowledge is acquired is not only dependent upon these three factors. Figure 3 shows these three factors as being embedded within affect. The role of affect cannot be separated out from the analysis of human behaviour since it underpins our very existence (Barsade, 2001; Barsade et al, 2000; Eysenck & Keane, 2000; Forgas & George, 2001; Lazarus, 1982; Power & Dalgleish, 1997; Zajonc, 1965, 1980, 1984). Emotions, however, have primarily relational rather than personal meanings, which mean emotions relate to an event or experience that most frequently, involve others. This is what constitutes a dyad or group as a system (Parkinson, 1995). From this perspective, feeling emotional is not just a personal reaction, but it involves declarations about one's identity relative to others, or classification of the social situation (Thompson, Nadler & Kim, 1999) and is referred to as endogenous emotion or emotional contagion (Schoenewolf, 1990). If individuals experience an affective state, but are not cognizant of the fact they may have developed this as a consequence of the emotion of another, they will assume the origin of that feeling comes from within them. Barsade (2001) suggests that this can lead to behaviours based on a flawed attribution or justification to explain their feeling state, which can then influence group dynamics.

For example, a group could be unknowingly affected by a particular negative member who causes the whole group to feel some negative affective state, thus leading to possible morale and cohesion problems, unrealistic cautiousness, or the tendency to disregard creative ideas. Conversely, unrecognised positive mood contagion in which a euphoric feeling is incorrectly attributed to the task, may lead to over-confidence, group-think (Janis, 1982), or increased pressure for group uniformity. This may lead to poor performance or produce expectations of performance that the group may not be able to sustain. Consequently, within the model depicted in Figure 3, affect is recognised as a factor that permeates all others.

Finally, as affect is said to be an expression of underlying belief systems (Forgas & George, 2001), which are, in turn expressions of a set of values (McKnight & Sutton, 1994), values are shown to underpin the entire process. Relationship building and trust, essential elements in an effective knowledge network, result from individuals gradually exposing more of their values and beliefs through words and actions that are shared over time (Maturana, 1980; Schuetz, 1962, 1964, 1967). It is only through the development of interpersonal relationships that individuals are able to approximate the mutual understanding that is necessary to acquire, disseminate, or create new knowledge with integrity. Accordingly, this model has been adapted to now include a feedback arrow as new knowledge extends or alters existing knowledge networks, thereby altering one's frame of reference. Subsequently, this influences the ways in which individual cognition, social contingencies, communication processes, and accompanying affect impact upon the subsequent acquisition, dissemination and utilisation of knowledge. This demonstrates the importance of managing and maintaining relationships in the effective management of knowledge networks (Seufert et al, 1999).

In combination, these two models acknowledge the multi-level complexity of knowledge management in collaborative research settings, while simultaneously identifying the common influences among them. What is of interest now, is how might those factors be best managed in order to maximise the utility of knowledge emerging through collaborative research settings?

Practical Implications

To acknowledge the interrelated influences of cognition, communication, affect and social contingencies in collaborative research arrangements is but one step towards enhancing the outcomes of such a project; knowing how best to manage this process is another. Based on the findings of recent research and drawing on the literature, a model of "best practice" is offered (see Figure 4). However, there are several caveats that accompany this model.

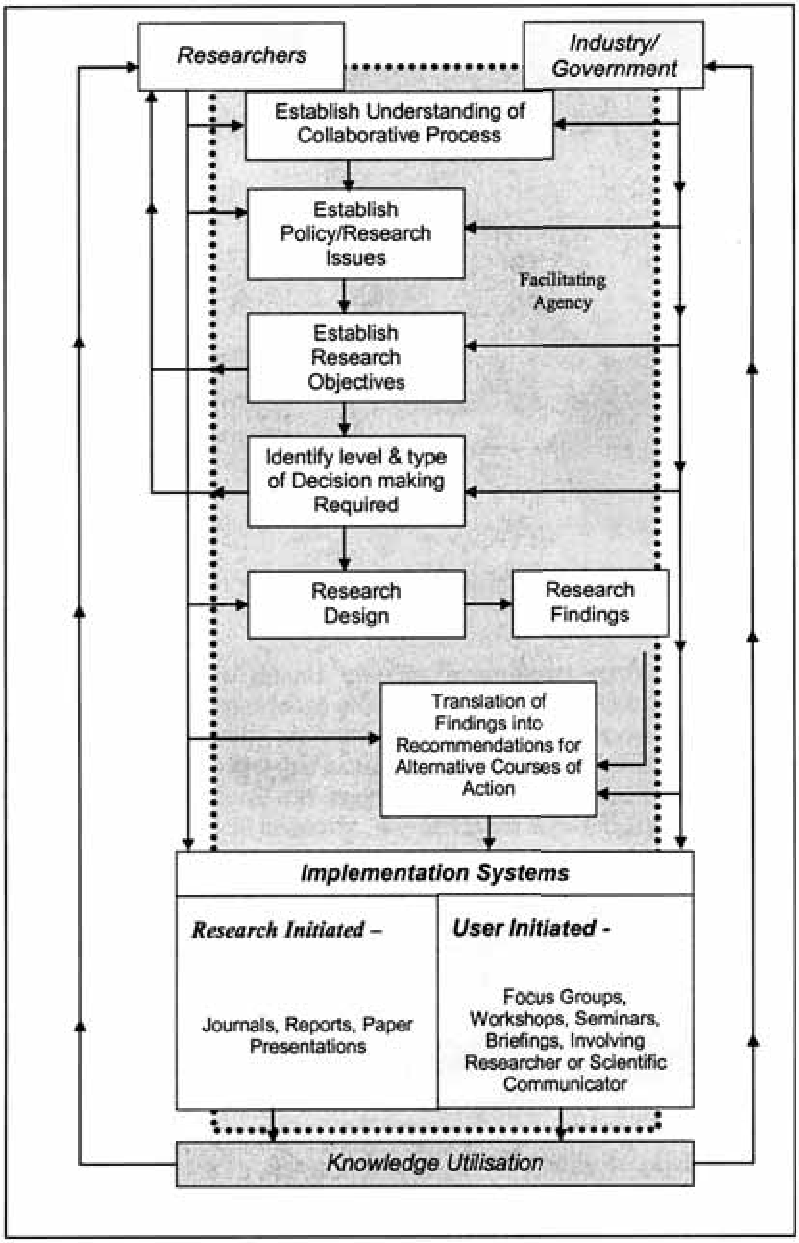

Figure 4
Prescriptive model of collaborative research processes.

First, the model has been informed by the vast array of literature that describes methods and practices to facilitate group learning. Each component of the model is, therefore, not only informed by current research, but also informs current understanding of group facilitation processes – recent research findings serve to compliment the processes that are known to be effective (Beesley, 2003a, 2003b). The unique contribution this model makes is that it collates and connects established processes that have previously been approached in isolation, while also adding to them. Second, the model should not be interpreted as a simple linear process, since there are several conditions that must be present in order to achieve the optimal benefits associated with collaborative research undertakings. These conditions, and the ways in which they might best be realised are presented in conjunction with an explanation of the model.

The first necessary condition is that the processes described in this model should be underpinned by adaptation of the processes required of a learning organisation (Senge, 1990; Senge, Kleiner, Roberts, Ross, & Smith, 1994). That is, a collective that is ‘able to deal with the problems and opportunities of today, and invest in its capacity to embrace tomorrow, because its members are continually focused on enhancing and expanding their collective awareness and capabilities’ (p. 4). Organisational learning is reflected in the development of new conceptions and attitudes, the re-labelling of existing classifications, and the amendment of standards of judgement (Vecchio, Hearn & Southey, 1996).

Second, the scope, timing, and intensity of the collaboration, which are known determinants of stakeholder engagement, and the development of consensus should be approached in accordance with the principles put forth by Bramwell and Sharman (1999). No collaborative research undertaking can realise its full economic (or social) potential unless all stakeholders are fully engaged in the process. Based on recent research, initial stakeholder engagement would be best achieved through promoting the benefits of involvement (Beesley, 2003b, 2004, in press). Potential stakeholders should be asked to embrace something positive rather than “let go” of something that is or has been of value to them or upon which they are institutionally dependent. Negativity does not promote growth (Rogers, 1993).

Rather than emphasise change – the prospect of which gives rise to the negative affective states of uncertainty, distrust and fear – the ways in which the past can be built on to create something of greater value should be emphasised. When individuals experience the negative affective states that accompany the letting go of something that is of value to them, there is the possibility that the individual will interpret the antecedent events that had nothing to do with them, as bearing on them personally (Kramer, Newton, & Pommerenke, 1993).

Fundamental to the success of a collaborative research project is that all participants develop an understanding of values and principles that would underlie such guidelines. Accordingly, as shown in Figure 4, it is the starting point of the collaborative research process. It is difficult to achieve a learning organisation approach when group members are not aware of the principles and values underlying it. This suggestion however, involves more than participants being aware of the values and principles – they must develop an understanding of how they and other members of the group negotiate their way through them.

Individuals coming together to engage in collaborative arrangements would need to understand how and why their roles might differ from those within their originating organisation. In other words, those participating in collaborative arrangements of knowledge production would need to develop an understanding of the ways in which individuals *socially* and *emotionally* construct and interpret their worlds. To achieve this, participants need to appreciate the ways in which emotions reflect individual values and belief systems. In developing a greater awareness of their emotional states, participants in such settings would be better equipped to identify the values underlying their thoughts (Schwarz, 1994). This would lead to deeper processing of information, which would, in turn, enhance the opportunity for knowledge to be acquired. Furthermore, those involved in collaborative research settings would need to be aware of the concept of emotional contagion. In order to optimally utilise knowledge emerging through collaborative research undertakings, the negative effects that can arise through a lack of awareness of emotional contagion (as mentioned previously) must be avoided. To avoid the negative effects of emotional contagion, a greater understanding of the conditions and concepts of this phenomenon is required by both facilitators and participants (Barsade, 2001).

Understanding Knowledge Processes

Research has shown that if research findings are to be maximally acquired and utilised, participants involved in collaborative research settings need to comprehend the difference between procedural and contextual knowledge[1] and the situations where use of the skills associated with each are appropriate (Beesley, 1999, 2002a). In terms of outcomes, that is, the utilisation of knowledge, it is suggested that process is more important than the structure of the network between collaborating parties. It is, therefore, advised that a strategy of involvement be employed from the onset. A strategy of involvement refers to both parties sharing the experience of the context in which the knowledge is created. Knowledge acquisition occurs in the course of action and experience. Therefore, practical exercises in "workshop" forums would provide continual education and training experiences as both parties gain an appreciation of each others cognitive processes and further develop and extend their own. Awareness and resolution of conflicting meanings will also provide insight as to individual agendas, values and belief systems, all of which support one's frame of reference. While this approach is similar to normative models of group facilitation and some forms of action research, it differs in two ways. First, emphasis is placed not just on the need for participants to develop an appreciation of each other's knowledge structures, but also on identifying the different types of knowledge underpinning those structures, and the situations where use of the skills associated with each are appropriate. Second, the model described in Figure 4 differs from other normative models in that achieving the level of awareness and understanding described thus far is antecedent to any other stage in the processes. Once participants develop this level of understanding, it is then possible to identify the issues that would serve to set the research agenda.

Setting the Research Agenda

As was evident in the literature, full stakeholder involvement is required during agenda setting if stakeholders are to become fully engaged and take ownership of the research outcomes (Vroom & Yetton, 1973). Additionally, full stakeholder involvement in this process occasions the opportunity for researchers to develop greater contextual knowledge. It also gives end-users of research output an

[1] Procedural knowledge involves knowing how to take data, turn it into information and incorporate that into existing networks so as to expand one's knowledge base. On the other hand, contextual knowledge involves an acute awareness of one's environment, the issues arising from it, and how that individual is embedded within it.

opportunity to enhance their procedural knowledge skills. Once the issues that research is to address have been identified, it is then possible to establish the objectives of the research and the level and type of decision making the research findings are to inform. While this is similar to the normative model put forth by Vroom and Yetton (1973), the findings of this study serve to compliment their research in a unique manner.

Based on the premise that emotions are elemental components of cognitive functioning that are in themselves value statements (Beesley, 2003a), objectives should be first identified as value statements, rather than outcome statements. That is, objectives are identified through first understanding what values are to be reflected in the outcomes. Outcomes that are consistent with values can then be identified. Common sense dictates that when stakeholders are aware of the values that underlie a desired end-state, and when there is consistency among them, deeper levels of stakeholder engagement eventuate. Greater awareness of value systems would also facilitate the development of mutual understanding, which is required if knowledge acquisition is to exceed the level of individual learning. Accordingly, it then follows that increased understanding among group members would give rise to more creative thought during decision making or problem solving tasks as increased trust among group members develops. Through this process, stakeholders would also identify the levels and types of decision making the research output would inform. This would serve to increase the researcher's contextual understanding and in doing so, assist in the design of research optimally congruent to the needs of end-users.

Research findings would then be presented to stakeholders in forums such as focus groups or interactive workshops so that they might deepen their understanding of the research output and determine how this new information might be assimilated into existing knowledge structures. This would mean establishing what the findings mean in relation to the issues first raised, and how best to satisfy the objectives identified. In other words, dissemination efforts would result in end-users of research output translating the findings into possible courses of action to achieve the desired outcomes (see Figure 4).

The Dissemination of Research Output

Taking the research findings out to a larger audience involves two implementation strategies appropriate to each audience. Researchers will wish to contribute to the extant body of knowledge with the results of their work through peer-reviewed publication. End-users of the research findings may well need to engage in educative processes in order for the courses of action identified to be implemented. In Australia, over 90 per cent of tourism businesses are small to medium-size enterprises (SMEs) (DITR, 2003). Research has shown that managers of SMEs commonly lack the skills (Glen & Weerawaradena, 1996; Robinson & Pearce, 1984) and often lack the inclination (Malone & Jenster, 1991) to engage in strategic planning. They have little opportunity to develop the necessary experience with strategic planning because they rarely have an opportunity to engage with the necessary information (Davis, 1997). This presents a particular challenge for any collaborative tourism research undertaking, since the majority of end-users of research output will be SMEs.

If research output is to be optimised maximally, not only do research findings need to be disseminated in a way that promotes the uptake of knowledge among stakeholders, they must also demonstrate the value of strategic planning and how to engage in it. Interactive workshops and focus groups would provide an ideal forum for these sectors to develop not only an understanding of the value of research output, but also how they might utilise research output in strategic planning. From the results of this study, it is evident that emphasis needs to be placed on industry extension programmes if the knowledge emerging from collaborative research projects is to be optimally utilised. As Figure 4 illustrates, the utilisation of knowledge then leads to an ongoing process of needing to know more, through which the whole process may begin again.

In Figure 4, the facilitating agency, is embedded in the entire process. Therefore, the facilitating agency (or project management team) becomes a conduit through which this process occurs. Their role is to facilitate the linkages between industry, science and government so that a truly tri-lateral arrangement of scientific knowledge production may give rise to an organisation in its own right. Those who would engage in the facilitation of this process would need to exhibit certain characteristics. Facilitating personnel need to be able to accurately read not only the emotional states of others, but also of themselves. They would need to be acutely aware of the political moves being made by stakeholders, and be able to make an educated guess as to when apparent political moves are actually demonstrations of a lack of understanding.

Recent research has shown that apparent resistance of stakeholders engaging in collaborative tourism research can actually be a demonstration of the difficulties stakeholders experience as they attempt to alter their existing knowledge structures, or frames of reference (Beesley, 2003a, 2003b). The political activities and control problems often observed in collaborative research undertakings may not be signs of resistance. Rather, they may actually be expressions of the cognitive, emotional and social difficulties individuals experience as they attempt to come to terms with information that does not easily fit with existing knowledge structures. Rather than defiance, apparent 'resistance' may signal the fact that different communication methods are required to facilitate the uptake of knowledge. If management of collaborative research projects were to view 'resistance' in this way, it would reduce the need for them to engage in control processes in order to realise a project's objectives. Rather, in line with current research, the enhancement of communication processes would only serve to increase stakeholder engagement. If project management were to view stakeholder resistance in this way, then the way in which information is disseminated to stakeholders would also require rethinking.

Rather than intensive half- or full-day workshops that predominantly employ one-way communication processes, perhaps workshops need to be broken down into a series of workshops of shorter duration, employing interactive two-way communication methods. This would allow all participants the time to reflect on new information before they are required to draw on it in order to inform decision making, and would enable gradual restructuring of the stakeholders' knowledge networks. Furthermore, a period of reflection would facilitate group learning if participants were given the opportunity to engage in dialogue on each occasion they regrouped. To do this means that facilitators, or project management would need to display patience and resist the temptation to over react to apparent political activity. They would also need to have a set of values and beliefs consistent with the values of a learning organisation and demonstrate a genuine respect for the viewpoints of others. Additionally, they would need to have an understanding of the research process and the procedural knowledge skills that accompany that process, in conjunction with the ability to appreciate the deep contextual knowledge held by the end-users of such research.

While this prescriptive model is promising as a means by which to maximise the utility of knowledge, there is one additional factor, which, while alluded to, is not explicitly acknowledged within this model. The influence it may have on this process makes it worthy of mention. That factor is the institution of science and the policies that underpin its current form.

Science Policy and The Institution of Science

A recent paper (Beesley, 2003c) has shown that science policy of many developed (and developing nations) is itself in conflict with that which it is espousing to encourage – collaborative research to drive innovation in growth. From the information presented in this paper, it is evident that policymakers and scientists are struggling to define the configuration of science in a knowledge-based economy. The need to establish communication, collaboration and cooperation between industry and research is acknowledged, but there appears either an unwillingness or inability for either party to liberate themselves from their current institutional roles. Until this occurs, rather than overlapping communication and networks between the sectors, as suggested in the Triple-Helix model (see Figure 1), innovation systems can be portrayed as in Figure 5. In this latter model, the sectors, while they are interacting, are maintaining their current structures and identities, complete with norms, cultures and reward structures.

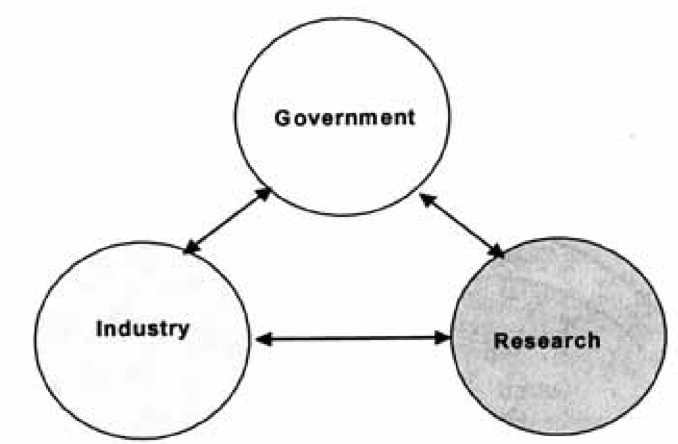

Figure 5
A model of university, industry and government relations demonstrating interaction but not interconnectedness.

There have been recent investigations into the institutional mechanisms that enable or hinder the development of new forms of knowledge production (Benner & Sandstrom, 2000). It was determined that the forces of change and continuity are currently engaged in a process of negotiation about the normative regulation of academic research and that existing institutional structures tend to hinder the evolution of new organisational routines. Therefore, it is suggested that the cherished beliefs held within the institution of science are colliding with political necessity. Research has shown that current science policy underpinning the Higher Education system in many countries does not encourage academic researchers to fully engage with industry/government stakeholders. In order to avoid such collisions, it is suggested that several structures and policies would need to be altered.

The structure of science as an institution would differ from its current format if the distinction between ‘applied’ and ‘basic’ research were to lose its power to mediate prestige (Chalip, 1985). Researchers would be afforded the same prestige through collaborative and transdisciplinary work as they are within their existing disciplinary structures. Current reward systems have given rise to the ‘publish or perish’ ethos and are often in direct conflict with collaborative research. To facilitate the full engagement of academia in today’s knowledge-based economy, reward systems (in terms of status, quantum and pecuniary benefits) would need to focus on the rigor, quality and outcomes of, rather than the ascribed type of research (i.e., applied versus basic research) or the ability to publish, and afford equal benefits, regardless of the nature of the research undertaken.

Finally, for the dynamics of the linkages formed between science, industry and the government to be fully appreciated and reflected within science policy, these linkages would be viewed not as collaborations, but as a *convergence* of these sectors. If organisations can be conceptually represented as helices (as in the Triple Helix model), then organisational life can be thought of in terms of spheres of activity. The distinct organisations that emerge through the convergence of overlapping spheres of activity develop as procedural routines from each sector are shared. These, in turn, centre on the emergent organisation’s own institutional order. Further to this, it is an institutional order that is accepted and adopted by all actors in that organisational field. The formation of these new organisational fields however, requires more than intellectual acceptance of their utility. It requires a fundamental cultural shift from one sphere of activity to another, where existing roles are altered and sometimes diminished, compared to an individual’s standing in their original organisation. Within this new organisation, all actors would be of equal importance, and their contributions would be afforded equal status.

The infrastructure of knowledge intensive economies implies an endless transition (Etzkowitz & Leydesdorff, 2000). For these new convergent organisational fields to reach their full potential, an increased tolerance towards the ambiguity and uncertainty (that will arise through the dynamic tensions inherent whenever disparate parties come together pursuant to a common goal) is required. To remove these is to remove the dynamics of a triple-helix system. Tight controls and procedures, as often seen in collaborative research settings (Beesley, 2002b; Halme, 2001; Helling, 1998; Mann et al, 1996), ensure predictability and occasion “comfort zones” within which one can operate with relatively little effort, but they also mask divergence, obscure serendipity and shroud differences (Sparrow, 1998). Control and procedural mechanisms legitimise the psychological addictions that are employed to “buffer” uncertainties. In turn, these mechanisms blur the awareness of one’s feelings towards, and understanding of a particular issue (Schaef & Fassel, 1988).

The theoretical underpinnings, and the practical expression of that theory as presented here, demonstrate clearly that the process of knowledge creation, diffusion and utilisation designed to drive innovation does not proceed in a linear fashion.

Rather, it is a complex and turbulent process influenced simultaneously by affective, social, cognitive and communication issues that must be acknowledged and appropriately managed if the benefits of tri-lateral arrangements of knowledge production are to be realised.

Conclusion

The opportunity to investigate the ways in which knowledge emerges through cooperative tourism research projects in an applied setting has provided insights that may not have been apparent in an experimental setting, due to the artificial nature of experimental research. The information presented in this paper contributes to the understanding of this emerging form of science production by demonstrating the interrelatedness of cognitive, social, affective and communication influences inherent, not only in the process of knowledge production, but also in the eventual utility, or industry uptake of research output. Acknowledgement of these influences has resulted in a series of recommendations for the management and facilitation of collaborative tourism research projects. Current research is investigating the impact this model has on the acquisition, dissemination, and eventual uptake of knowledge created in collaborative research settings. While this is still work in progress, early findings have been most encouraging, as the philosophies driving collaborative research become an exciting reality, thus demonstrating the potential economic and social growth that might exist within a knowledge-based economy, and the potential contribution of tourism in such an economy.

Finally, the interrelated nature of the factors influencing the movement and uptake of knowledge in collaborative tourism research settings has implications for the structure of the tertiary sector, and the policies that would underpin it. In a world where science policies demand greater collaboration between science, industry and government, the notions put forth in this paper have direct and immediate application to any collaborative tourism research project embracing the tenets of a knowledge-based economy. The theoretical and practical concepts presented provide a foundation for continuing optimism in a process that has not yet begun to realise its full potential.

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Chapter 4

Integrating Tourism and Environmental Knowledge in Space and Time

Challenges for GIS and Sustainable Management in the Top End of Australia

By Pascal Tremblay

Abstract

This paper reports the preliminary results, challenges and difficulties encountered in attempting to integrate tourism and ecological data in a Geographic Information System (GIS). Such systems are considered for planning purpose in the Top End of Australia where wildlife-viewing is known to constitute a primary travel motive (Kakadu National Park 2002; Tremblay 2002, 2003). The paper examines how such difficulties have been dealt with in the ecological and recreation literatures and suggests that few attempts to connect spatially ecological impacts with tourist's preferences can be found for a number of operational and conceptual reasons discussed in detail. The paper only describes the methodology applied in the Top End project and presents a few preliminary results for the sake of addressing the major difficulties and limitations associated with this type of endeavour. It concludes by suggesting ways forward to advance knowledge integration in the context of wildlife resources and tourism planning.

GIS and its Uses, in the Literature of Natural Resource Management, Recreation and Tourism

There has been growth in literature on methods, technical or otherwise, that can be used to store, analyse and display geographical data (Johnston et al, 1993; Grimshaw, 2000; Walsh & Crews-Meyer, 2002). Nowadays GISs are generally construed as computerised systems combining multiple layers of information in spatial databases which can be manipulated for a number of purposes, and allow for various types of presentation. In this project, a large share of the data has been provided by remote sensing techniques such as aerial photographs and satellite imagery. GIS and remote sensing have been used jointly for the sake of interconnecting directly observable or measurable features of the landscape with indicators of ecological characteristics and/or human-based features of spatial environments. This section summarises some of the relevant uses of GIS found in the literature concerned with ecological resources management, recreation and tourism.

In the literature that associates GIS techniques with ecological applications, emphasis has been placed on associating landscape features (such as land cover, soil, ground gradient, altitude) with ecological spatial attributes, for the sake of spatially identifying habitat extent and distribution for plants and animals, conflicting land uses, threats to biodiversity, etc (Bridgewater 1993; Congalton & Green, 1995; Griffiths et al, 2000).

Although there exists a large number of ways to assemble the data and model the distribution of individuals or ecosystems, a typical approach is to gauge habitat suitability for a wildlife species from land cover attributes combined with ecological prior knowledge, sometimes also referred to as a simulation (Congalton & Green, 1995:17). The appropriateness of various habitats for a specific species can be gathered from physio-biological variables as well as constraints arising from the built environment. Lopez (1998) for instance, analyses the habitat of deer in Costa-Rica by building an index incorporating data on natural attributes such as food, horizontal forest coverage, and slope of the terrain as well as indicators of human activity, presence of bodies of water, and distances between habitats. Modelling is unavoidably arbitrary to the extent that the weights associated with various features depend on judgment, are adjusted by trial and error and are ideally tested against field observations.

The main practice in GIS ecological applications has therefore been to combine land and other spatial characteristics with ecological data to produce multi-layered maps capable of identifying threatened habitats or to build indicators allowing predictions about animal populations locations and dispersion. If historical data is available, this can, in theory, be extended to show changes in available habitats, predict eminent threats and serve as a tool to plan for remedying conservation measures. Most uses of GIS belonging to that tradition (whether focussed on a specific species, ecosystem or linked with indicators of local biodiversity) have been concerned with developing efficient modes of prediction and with monitoring joint changes in landscape and environments (Congalton & Green, 1995; Griffiths, Lee, & Eversham, 2000; Lopez, 1998).

Although slow to develop in this direction, GIS methods have long promised useful applications in the area of planning of parks and protected areas. Typically models feature conservation and recreation as competing uses for a given area or set of resources (Carver, 1995). Multi-layered GIS data allow the integration of data about habitat suitability with data about recreational uses to identify spatial overlaps and potential conflict areas. For instance, Harris, Gimblett & Shaw (1995) assume that recreationists and mountain sheep in the Colorado National Forest compete for the same resource “land” and that park managers need to allocate such territory so as to minimise “conflicts” or “clashes”, deemed undesirable for the animal but not necessarily for the recreationists (Harris, 1995:562).

Such modelling can serve as the basis for the regulation of human movements within recreational areas and the identification of management options to minimise human-environment conflicts or understand the impact of bushwalkers (Bishop & Gimblett, 2000). In North Australia, GIS has been viewed as offering great potential as a way to approach management problems associated with various human impacts (such as fires or introduction of undesirable species in Kakadu National parks), but its use has yet to be extended to recreational and tourism purposes (Bridgewater, 1993, Hayder 2001). The lack of interest in tourism environmental impacts applications might stem in part from the view that ‘impacts of tourism and recreation on wetland values have so far been minor in the Northern Territory’ (Parks and Wildlife Commission of the N.T., 2000:9). Yet, in areas where access to tourism facilities, infrastructure, and culturally and environmentally sensitive places are repeatedly perceived as sources of conflict, there is increasing potential for linking wetlands ecological surveys with recreationists' movements to assess the spatial impacts of the latter (Parks and Wildlife Commission of the N.T., 2000:12-13).

GIS models have also been used in the realm of outdoor recreation for the sake of predicting the number of visitors to recreational areas and developing transferable demand functions, allowing the primary estimation of consumer benefits. When combined with socio–economic variables, the latter can be used to model substitute recreational amenities and examine the distributional impacts of investments in open-access recreation (Lovett, Brainard, & Bateman, 1997). GIS is generally held to offer great promises as a means to evaluate recreation and tourism potential in a planning context. The suggested methodology is generally similar to that of habitat modelling for wildlife, except that recreationist habits and habitat serve as the basis for modelling. An often-cited example is the case study of ecotourism potential in Northern Ontario in which the "habitat" of ecotourists is modelled. Boyd and Butler (1996) explain that only since the 1990s has the data collected by remote sensing techniques been on a scale and resolution allowing for planning and management applications to tourism and recreation (Boyd & Butler, 1996:380). They produced a series of maps that can be thought of as layers of data reflecting cumulative scores regarding the desirability of a location for ecotourism purposes. A distinguishing feature of the approach lies in the way knowledge of ecotourists' preferences are operationalised. The authors discuss at length the vagueness characterizing the term "ecotourism", and the fact that prediction of ecotourists movement through space needs to be based on acceptable assumptions for planning purposes. Similar conceptual and operational issues would exist for any market segment definition. In the Ontario study, they eventually adopt an approach which offers a specification (based on common sense and expert knowledge) of the behavioural attributes of a typical Ontarian ecotourist. This is quite similar to the way ecological knowledge is associated with wildlife species in ecological studies. Recognising that there is 'no single definition [which] appears suitable given the variety of specific activities involved and the great range of settings in which' ecotourism takes place (Boyd & Butler, 1996:385), they identify a series of broadly acceptable attributes of place that are deemed to hold a great appeal for ecotourists. For instance, they refer to such principles as ecotourists' respect for the integrity of host communities, the need for complementarity with existing resource-based uses present at the ecosystem level, and other ideological and aesthetic considerations such as their dislike for visible habitat degradation. Eventually, the authors blend generic characteristics of the presently conceived ecotourist market with characteristics of the place for the sake of computing ecotourism suitability scores. The rest of the procedure is rather conventional in following the ecological approach. A desirability index for ecotourism is built which takes into account natural features (forest coverage, wildlife potential, relief, presence of water), access (distance from main road infrastructure), density of attractions and other features relevant for the region they investigate. Although the weights associated with the various features are arbitrary, the approach provides a useful early attempt to combine ecological landscape knowledge with the assumed behavioural preferences of a specific market segment.

Williams, Paul, & Hainsworth (1996) suggest the integration of spatial information to produce suitability inventories for particular activities based on a mixture of natural and cultural characteristics as well as features of the built environment. The tourism resource inventory systems they seek to produce for British Columbia combine biophysical and human parameters (such as transportation, landscape aesthetics, land tenure) based on a mixture of objective and subjective (expert-based) criteria reflecting the needs and preferences of participants in various recreational activities. Similarly, Reed-Andersen et al (2000) examine the needs of small embarkation recreationists in Wisconsin and assume that landscape features, natural and man-built infrastructure, as well as congestion should impact directly on boat usage and trip destinations on various lakes. They hypothesise that perceived access to fish, water quality, aesthetic values, boat density, recreational amenities and spatial characteristics of various lakes would impact on their respective attractiveness. They verify empirically that lake facilities and distance from highway are especially statistically significant in explaining boat density but most variables linked with proximity of human services and lake characteristics seem to also play a role.

All the examples above apply to outdoor recreation and feature a market niche, a narrow segment or an activity in which tourists or recreationists can be portrayed as relatively predictable in their habits and needs, although the empirical work needed to support these assertions is rarely available. In the broader tourism literature, a number of surveys on the potential and development of GIS applications for tourism marketing and planning have emerged recently (Bahaire & Elliott-White, 1999; Bertazzon et al., 1997; Elliott-White & Finn, 1998; Kilical & Kilical, 1997; McAdam, 1999; Sussman & Rashad, 1994; van der Knaap, 1999). Most authors point at expectations and not yet realised promises rather than a number of ready-to-use applications. Recent developments of destination-based tourism information management systems incorporating user-friendly maps of routes and facilities abound and multiple websites on the topic can be found (Porter & Tarrant, 2001; Allen et al., 1999).

It is noticeable that fewer GIS applications related to mass tourism have found their way in the literature, possibly because they are of lesser interest to researchers or because they pose different sorts of methodological challenges. Among the uses connected with the expansion of mass tourism, changes in land uses and patterns have been documented (Allen, Lu, & Potts, 1999; Berry, 1991). Dietvorst (1995) has examined through GIS the spatial connections between socio-economic origins of tourists with travel flows in and out of a given theme park and its region in the Netherlands. McAdam (1999) surveys a number of uses and applications of GIS in tourism originating from the private and public sectors. Results display a high degree of diversity and fragmentation in approaches and methodology. He confirms that applications of GIS have in general focussed on 'remote localities or situations where tourism development is only at the consideration stage' and 'issues of sustainability are on the planning agenda because these environments and cultures remain largely unspoiled and unprotected' (McAdam, 1999:79).

While GIS hold the promise of combining different types of data and knowledge platforms useful for tourism management, planning and decision-making, there remain serious limitations in the availability of suitable data and the compatibility of the data across relevant disciplinary perspectives. This explains why current applications in tourism have been restricted to inventory and case illustrations akin to the ecological models described above. Applications in the area of impact assessment hold even greater difficulties, as they require mixing time and spatial perspectives. By definition, impact assessment and observation hinge on time-dependent data and must provide reliable ways of establishing correlations between cause and effects. Johnston, Pastor, & Naiman, (1993:237) also note that ecological applications of GIS have been concerned with wildlife suitability but rarely extended to impacts of animals on habitat and landscape.

Rindfuss (2002:7) mentions that a major challenge facing the scientific community is to link people to spatial dimensions so that social behaviour can be studied meaningfully in relation to changes in land use and land cover types, landscape conditions, and associated ecosystem processes. In particular, he points at the choice of appropriate spatial and temporal scales as a major challenge for GIS studies. Of equal importance is the realisation that ecological and social data usually come in different formats, 'social data are typically discrete, referring to point locations, whereas data on land cover and land use are typically continuous' (Rindfuss, 2002:7). So if GIS is to sit comfortably "on top of integrated and strategic spatial planning" and enable 'the integration of datasets representing socioeconomic development and environmental capital within a given spatial setting' (Bahaire & Elliott-White, 1999:162), tourism research must face the challenge of producing and finding ways of combining relevant spatial data.

Methodology

The project reported in this paper relating to the Top End of Australia falls in part in the tradition of those surveyed in the previous section, as it attempts to combine some knowledge of tourism behaviour with landscape features as well as ecological knowledge allowing spatial connections between wildlife and that landscape. Yet it is innovative in the way it [a] attempts to establish its connection between tourist preferences and behaviour and [b] its attempt to examine the dynamics of the connection between tourism development indicators and the natural landscape features which affect the quality of tourism experience in the region examined.

Rather than identifying a particular market segment for that region, it was hypothesized that as the opportunity to view wildlife constitutes a core attraction for the region, it would be beneficial to produce a wildlife-viewing tourism desirability index by identifying the species which play the greatest role in local attractiveness to tourists. The secondary, implicit hypothesis incorporated in the proposed methodology is that the wildlife species identified above would constitute valuable assets for the Top End. From a local resources management perspective, it is worth investigating whether these iconic wildlife-tourism resources are sufficiently recognised (which species play a key role), supported (whether viewing opportunities are sufficient or well managed) and whether they are themselves threatened by developments taking place in the Top End, including expanding infrastructure for tourists. In other words, it is assumed that the sustainable management of ecosystems, which incorporate wildlife species of interest to tourists, needs to be concerned about the spatial distribution of these ecosystems and how they are affected by tourism-related and other developments.

These general exploratory questions required a variety of methodological investigations. In the first part, the study establishes the required underlying knowledge base allowing for a tourist-driven study of the attractiveness of various locations in the broad surveyed region. This forms the static component of the analysis insofar as tourists in the Top End were surveyed to identify wildlife species that they wanted to see and which they considered to constitute the most important attractors for this destination. While most tourists do not visit the Top End region only to view wildlife, it is recognised that there is a high level of correlation between the landscapes they are interested in exploring, other cultural interests they may hold and the animal species they want to view (Tremblay 2002, 2003).

This market research-based knowledge of tourist preferences is then combined with spatial-ecological knowledge which can be merged into the GIS framework. This component is more conventional in that it results from the integration of land coverage data and ecological knowledge applied to the identified wildlife species, to build maps of wildlife-viewing suitability locations.

From that original methodology arises a tourism-led perspective on the valuation of various environments and locations and a set of parameters built specifically for this space and environment. It suggests a way of utilising demand-side knowledge of tourist preferences to assess socio-economic values of regional resources based on the most relevant species or habitats. As a basis for planning, it obviously provides a greater legitimacy to recreational uses and is particularly relevant when the management focus is not on a single endangered species, but on dispersed and threatened habitats associated with many species of interest to tourists.

The second component of the project examines medium-term linkages between landscape attributes and tourism and other development. A conceptual connection can be established between several indicators of residential, industrial and tourism developments and resulting impacts on the landscape. If such connections can be empirically established in space, it becomes possible to assess the extent to which tourism growth is itself impacting adversely on its own core resources (the “killing the goose that lays the golden egg” syndrome). Serious conceptual and empirical difficulties arise with that component and they are examined below. Yet it is useful to mention beforehand that the approach hinges on a leap of faith. In particular, the approach assumes that the (static) data collected about tourist preferences for wildlife-viewing is sufficiently lasting so that the conceptualisation of desirable tourism locations itself is stable throughout the period investigated. Given the collections of wildlife species identified and their habitats in the Top End, there are good reasons to believe that this is not a major problem at the present. Yet it cannot be proven, as historical data about tourist preferences towards wildlife is unavailable. Nor is it clear that the same would apply to other locations. In the main part of the study, we examine the connections between tourism development (infrastructure, tourists’ movements, changes in land tenure) and habitat-landscape changes in the parallel time period for a given set of wildlife species. Although space- and time-based correlations would at best point towards connections between tourism development and landscape evolution, it opens up the possibility of temporal feedbacks and the ensuing possibility of spatially identifying in greater depth tourism impacts on wildlife habitats.

A fair amount of technical details must accompany such a study. Some can be found in related publications (Pearson, Robinson & Zhang 2002; Robinson 2002; Tremblay 2002, 2003) and some are set to appear in the detailed CRC Sustainable Tourism report. It is useful to mention that the digital data used in this study consists largely of digital AUSLIG 1:250,000 topographic data, retrospective remotely sensed imagery for the last 20 years, combined with Transport and Works and Land Tenure data for various points in time. The AUSLIG topographic data provides digital maps for the local infrastructure, hydrography and relief. The satellite imagery used in this study is commonly referred to as Landsat data. Since the imagery has been collected over 20 years and technology has changed during this time, two types of scanner and different Landsat satellites have been used to capture the imagery. What is known as Landsat Thematic Mapper (TM) data has been captured for 1990, 1995 and 2000 and Landsat Multispectral Scanner (MSS) imagery is used for 1980 and 1985. A fair amount of manipulations and adjustments are required to allow for temporal comparability. The imagery is made up of several spectral bands that support the identification of key landscape characteristics and that are useful for mapping land cover and land use. Two images were needed for each year to cover the whole study site. One covers the Darwin-Outer Darwin region, the other extends to the western boundary of Kakadu National Park. Current digital land tenure data was also obtained from the Department of Infrastructure, Planning and Environment. Past tenure data was obtained in the form of paper maps and these maps were used to add information on the status of change to the current digital data as an attribute in the database table (Robinson, 2002; Pearson, Robinson & Zhang, 2002).

Other ancillary information collected and entered in the GIS originated in secondary research into the main tourist attractions found along the Darwin to Kakadu corridor. This included collecting the grid reference for these tourist locations so that a spatial point data set of locations could be created within the GIS, and other information such as the dates of establishment of these attractions and visitor numbers were entered into the database. Other data sets such as vehicle counts were collected for specific points along the Arnhem highway to give a feel for how traffic flows along the highway as well as how visitor numbers to attractions have changed over time. Although these were adequate as indicators of total residential, industrial and tourist traffics, there is a serious dearth of information about the relative importance of tourists, other recreationists and other users of the corridor. Rainfall data was obtained in tabular format from the Bureau of Meteorology.

Preliminary Findings

Due to the breadth and complexity of the components of this project, only the results of the first, static part can be reported below. The full report will attempt to combine the spatial and time dimensions, and evaluate the dynamic impacts. Some of the results from various components have been reported elsewhere (Pearson et al., 2003; Pearson, Robinson & Zhang, 2002; Tremblay, 2002; Tremblay, 2003).

In the first phase, the identification of tourists' expectations and motivations to see wildlife species led to interesting challenges in itself (Tremblay 2002). Tourists do not conceptualise animals, their habitats and their activities along conventional or formal species categories compatible with ecological concepts. This caused difficulties because while a few wildlife icons could easily be reduced to a species, others had to be represented as groups of animals meaningful to observers, but not necessarily for the determination of habitat. This had an impact on the degree of precision with which ecological knowledge could be superimposed to define suitable habitats and locations. For the sake of taking into account knowledge limitations of tourists and combining adequately their perceptions with ecological knowledge, the following icon species were identified and eventually used for modelling: crocodiles, buffalo, barramundi, waterbirds and kangaroos/wallabies (Tremblay 2002). While it is reasonable to infer a specific species for the first three categories, the latter two posed greater interpretation difficulties.

Ecological knowledge was assembled to reflect the habitat characteristics of each species or group. These were then translated into meaningful structural characteristics of landscapes that have a high probability of [a] hosting the animals listed and [b] are able to be detected from remotely sensed data or other spatial data sources and therefore could be reproduced within a GIS. For the two looser categories incorporating a number of species, the criteria for habitat were slightly more subjective since they were based on expert knowledge of tourist preferences. In the case of waterbirds, it was assumed (from answers to open-ended questions and secondary sources) that tourists were expressing the desire to see locations where large numbers of birds gather near wetlands, referring both to bird density and species diversity. A broader range of habitats was included to reflect the inherent variety of wildlife experiences that can be found in the Top End's wetlands. With respect to viewing of kangaroo/wallabies, the demand is biased towards international tourists and it seems reasonable that they indicate their desire to view any type of marsupial in a wild environment. Habitats suitable for the most common wallabies found in the Top End were included, but this has proven problematic as these animals can be found almost everywhere, although they are not necessarily easily observed. In the case of the wallabies, very local conditions (such as the presence of lawn close to a caravan park) critically determine viewability, however, these conditions do not occur on a scale allowing incorporation in a GIS. In the case of buffalo, conventional data was used (as if the animals could seen in the wild as used to be the case), but it is clear that stable viewing opportunities are nowadays largely dependent on human control over land use. Habitat suitability maps have been produced through the combination of habitat-ecological characteristics listed in Table 1.

Table 1

Criteria for determining suitable habitat for the Top End's wildlife icons.

Species	Habitat characteristics	Spatial data
Crocodiles	Coastal rivers, swamps and creeks, Coastal wetlands and floodplains within 100km of sea, Down stream 10km above tidal influence, 200km upstream in major rivers and mangrove lined tidal rivers	AUSLIG topo 250K
Buffalo	Less than 100km inland, Large coastal floodplains	AUSLIG topo 250K
Barramundi	Coastal swamps, Upstream freshwater	AUSLIG topo 250K
Waterbirds	Sub-coastal floodplains, Permanent wetlands, Estuarine mangroves, Retreat coastwards with dry season, Swamps and marshes, Saline flats, floodplains, tidal sections of rivers	AUSLIG topo 250K
Wallabies	Tropical lowlands, Coastal and sub-coastal plains, Between savannah woodlands and grassy plains of rivers, streams and billabongs, Late dry around waterholes, Open flat habitat/low relief, Open grassy forest along rivers and streams, Extend 100s km inland	Landsat classified image

An example of the maps produced (for crocodiles) is found in figure 1. Suitability is summarized by a binary variable and represented by the red colour on the map. In the second phase of the data gathering exercise, many indicators were derived to reflect the increasing importance of tourism in the region (Robinson, 2002; Pearson, Robinson & Zhang, 2002).

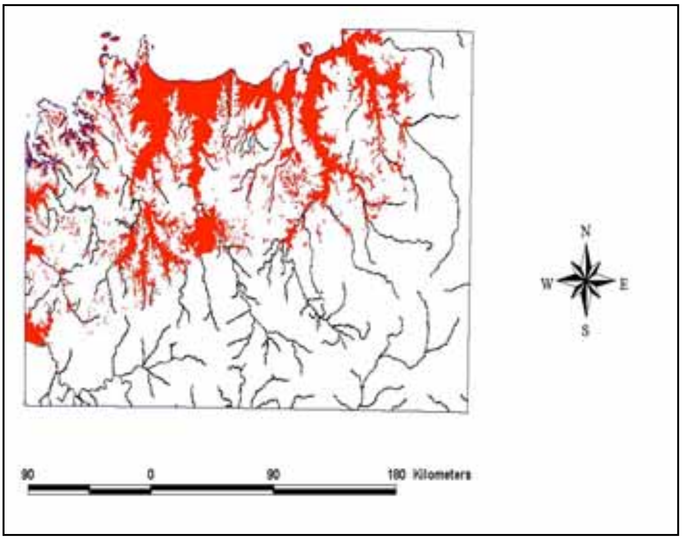

Figure 1
Site suitability map for saltwater crocodiles.

The emphasis is placed mainly on analysing visitor numbers within the Darwin to Jabiru corridor over the twenty years period between 1980 and 2000, as well as examining infrastructure changes which have accompanied visitor movements within the corridor during that same time period. Among the fragmented body of empirical evidence which could be gathered, the following sources proved the most useful and dependable indicators of tourism growth:

- data on the presence of attractions and visitor numbers at main tourist attractions situated in the Arnhem highway corridor (linking Darwin to Kakadu) at different points in time have been included (see figures 2 and 3);
- records of vehicle counts on the Arnhem highway at a few strategic locations were also included (see figure 4); and
- changes in land tenure status in the central region (Mary River area) have also been examined (see figures 5 and 6) for the sake of representing spatial and temporal changes connected with tourism development in the region.

Robinson (2002) discusses in detail the complexities and data limitations associated with these and other indicators which were considered to reflect tourism development in this region. Lack of consistent records (for infrastructure development, attractions or tourists movements) and poor differentiation between users were particularly problematic.

As land cover data has been acquired and processed for the equivalent 20 year period (see for instance figures 7 and 8), the full analysis involves overlaying the tourism data with the discrete time-slices of landscape and examine the evolving connections between the two.

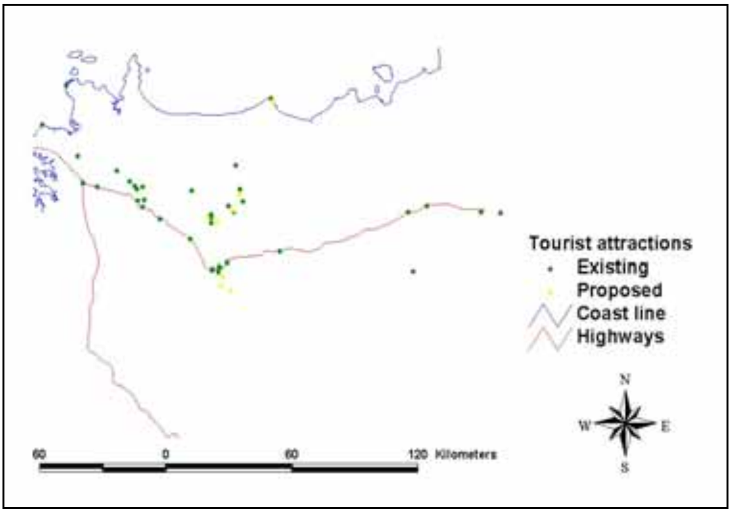

Figure 2
Distribution and status of the main tourist attractions on the Darwin to Kakadu corridor.

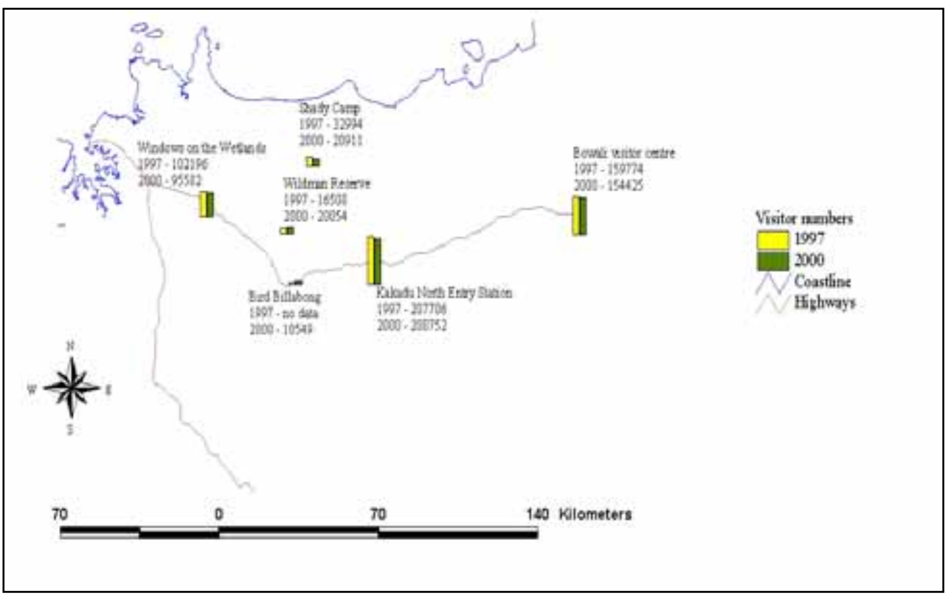

Figure 3
Comparison of visitor numbers for the main tourist locations between Darwin and Kakadu in 1997 and 2000.

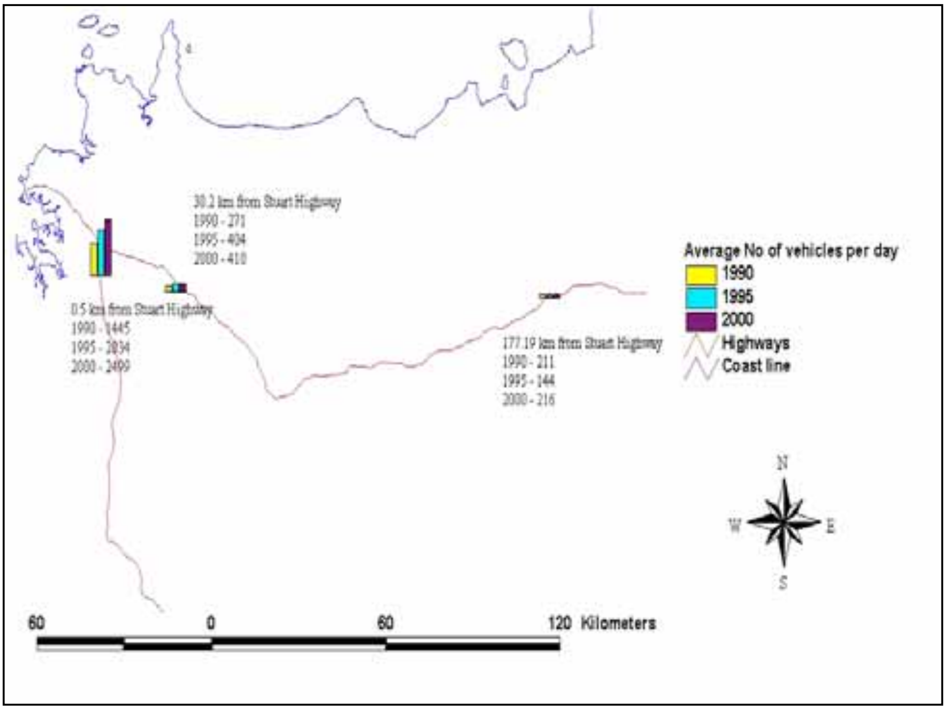

Figure 4
Vehicle counts recorded on the Arnhem Highway Darwin to Kakadu corridor 1990,1995 and 2000.

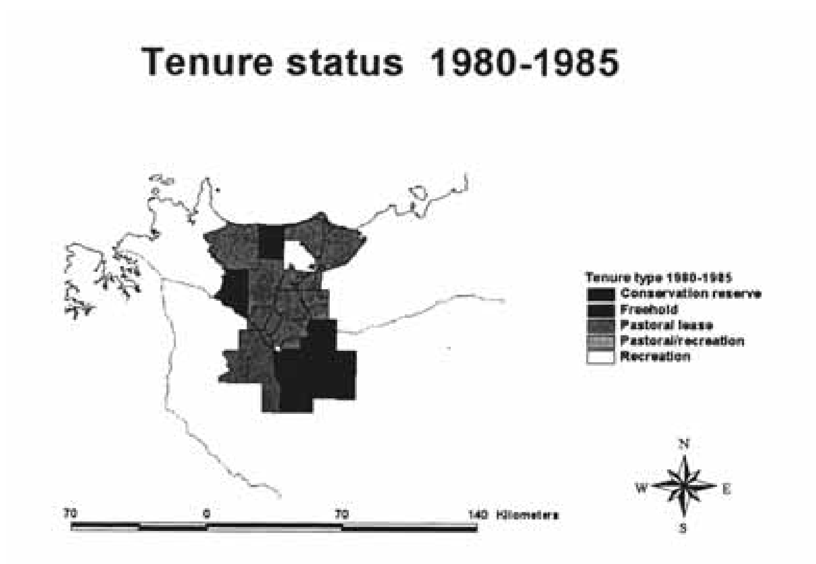

Figure 5
Tenure status 1980-1985.

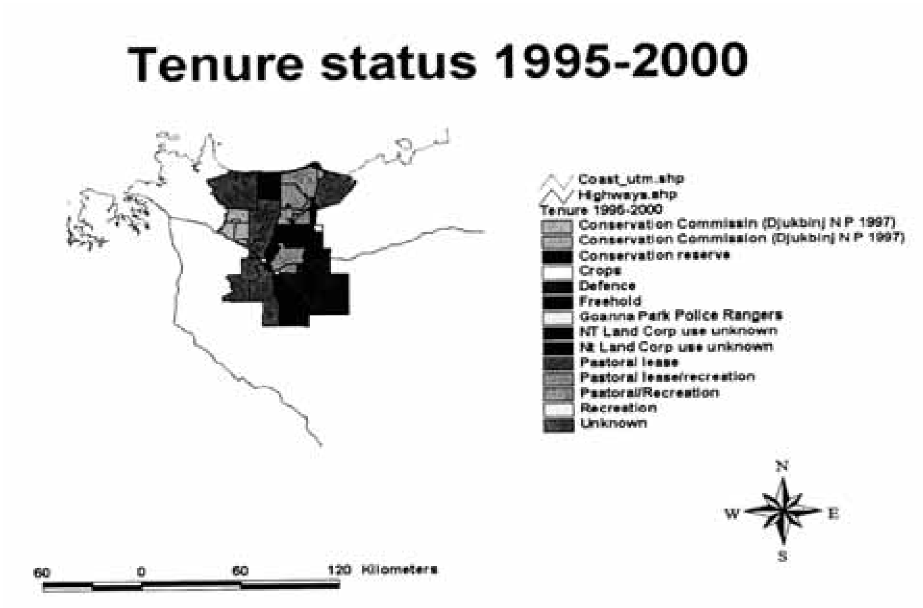

Figure 6
Tenure status 1995-2000.

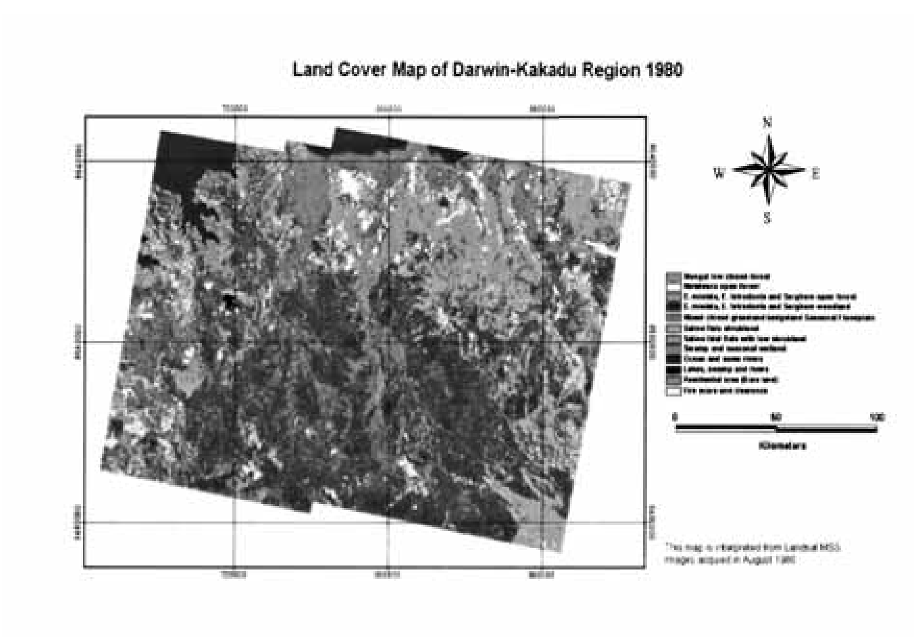

Figure 7
Land cover map of Darwin-Kakadu region 1980.

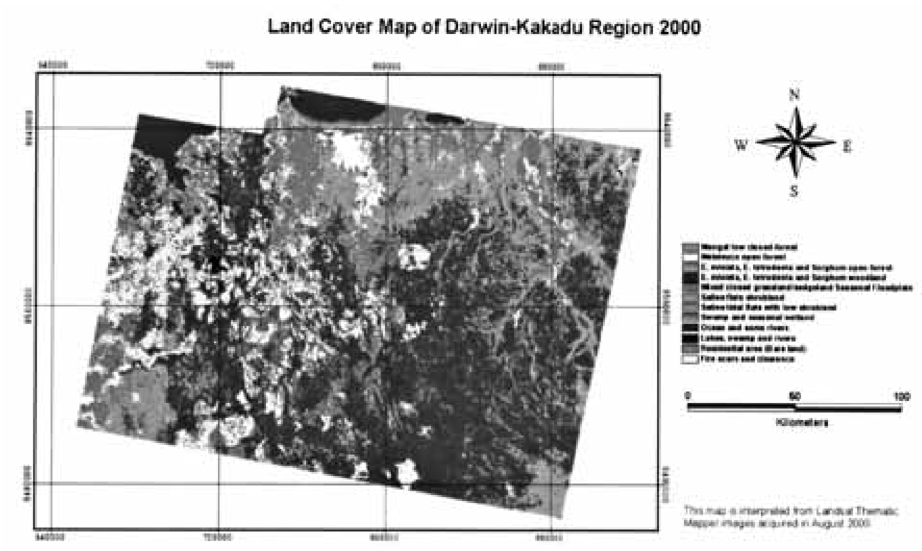

Figure 8
Land cover map of Darwin-Kakadu region 2000.

To make a better use of the limited available data, greater attention has been given to smaller tourism areas for which land tenure information is available at given points in time (as in fig. 9).

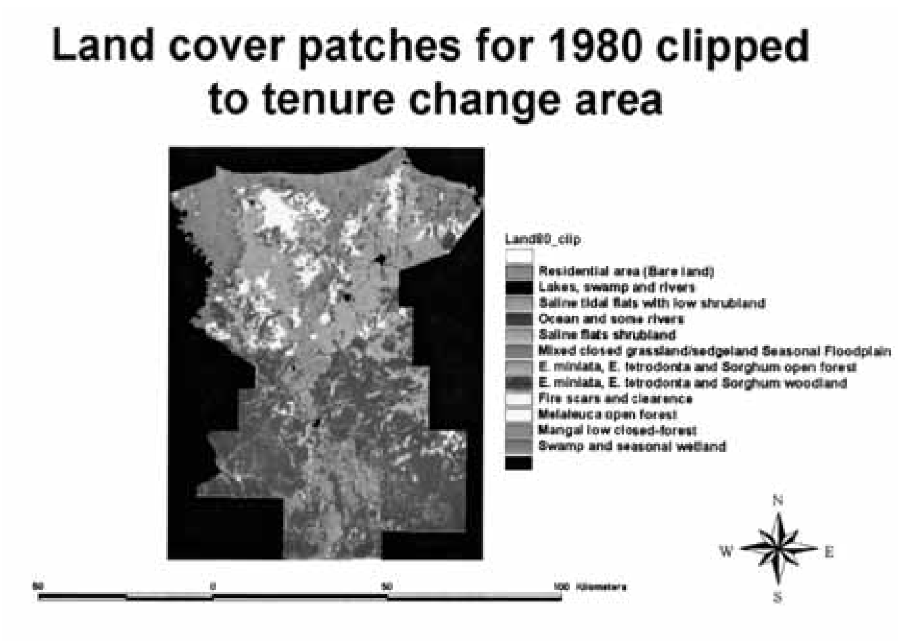

Figure 9
Land cover patches for 1980 clipped to tenure change area.

Focus was also directed towards tourism buffer zones where detailed data for traffic flows and attractions can be found (fig. 10).

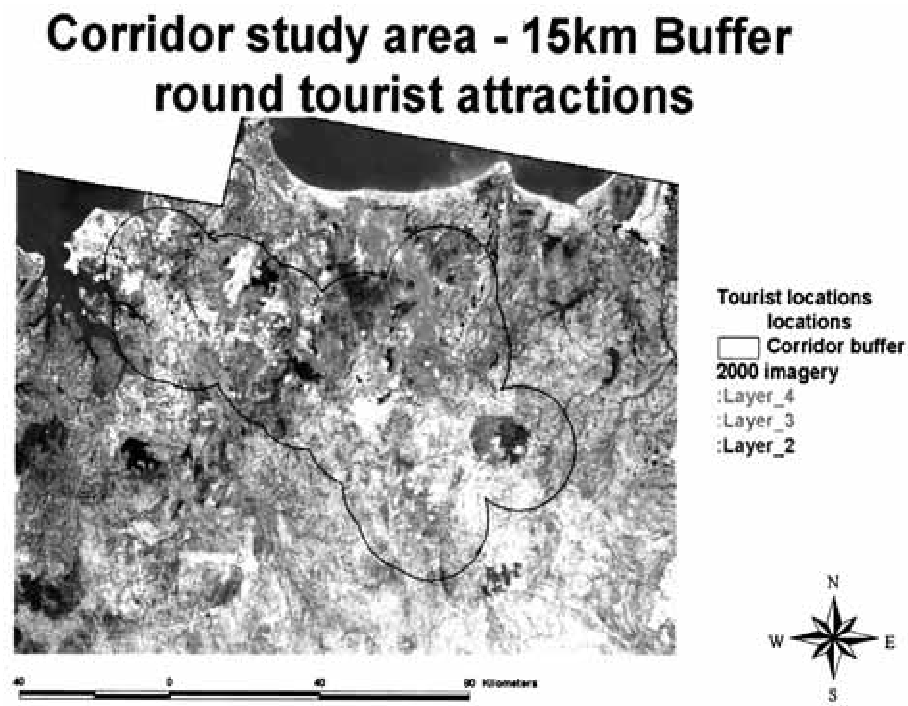

Figure 10
Corridor study area 2000 – 15km buffer around tourist attractions.

The detailed descriptions required will be provided in the forthcoming report. The objective of this paper is not to provide extended results but to discuss the conceptual, technical and data limitations.

Measurement Difficulties and Limitations

This paper’s main aim is to uncover challenges connected with knowledge integration involving ecology, spatial data and tourist behaviour. It is important to distinguish between technical problems and conceptual difficulties associated with the implementation of that integration. This section examines some of the more technical measurement issues, and notes strong parallels with the difficulties found in other applications of GIS when remote-sensed data is integrated with ecological knowledge to support spatial and temporal analysis.

In the fist part of the project, typical difficulties with data scale and compatibility were encountered in both the static and dynamic components of the project. As suggested earlier, the degree of resolution of the knowledge involved differs markedly between tourists (for instance when identifying broad categories of wildlife attractors) and ecological research (involving precise rather specific land cover – habitat relationships). This leads to the necessary adjustment of ecological data to fit the tourism research needs.

The species or groups identified as iconic attractors also overlapped largely with respect to their ideal habitats, which is a specific feature of the Top End. This can be observed in cases where indexes of wildlife attractiveness were derived combining the 5 group-species retained in the study (see figures 11 to 13 featuring different scales). This could be hypothesised to result from high consistency or convergence in media images formulated by marketing agencies and private tourism operators about the natural environment in the Top End. But it hinders the mapping process by reducing the ability of the model to discriminate between locations and differentiate among types of environments. This only adds to typical difficulties associated with ecological predictions based on GIS-type systems such as those identified by Huston (2002): '(1) mismatches between the spatial and temporal dimensions at which hypothesised processes operate, (2) misunderstanding of ecological processes, and (3) use of inappropriate statistics to quantify ecological patterns and processes.' (Huston 2002:7).

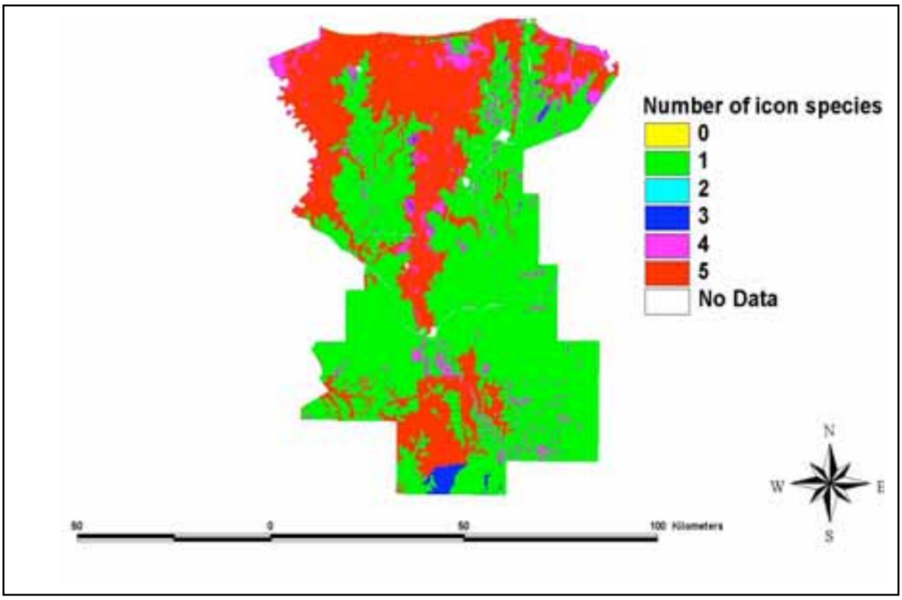

Figure 11
Index of wildlife attractiveness: Mary River Area.

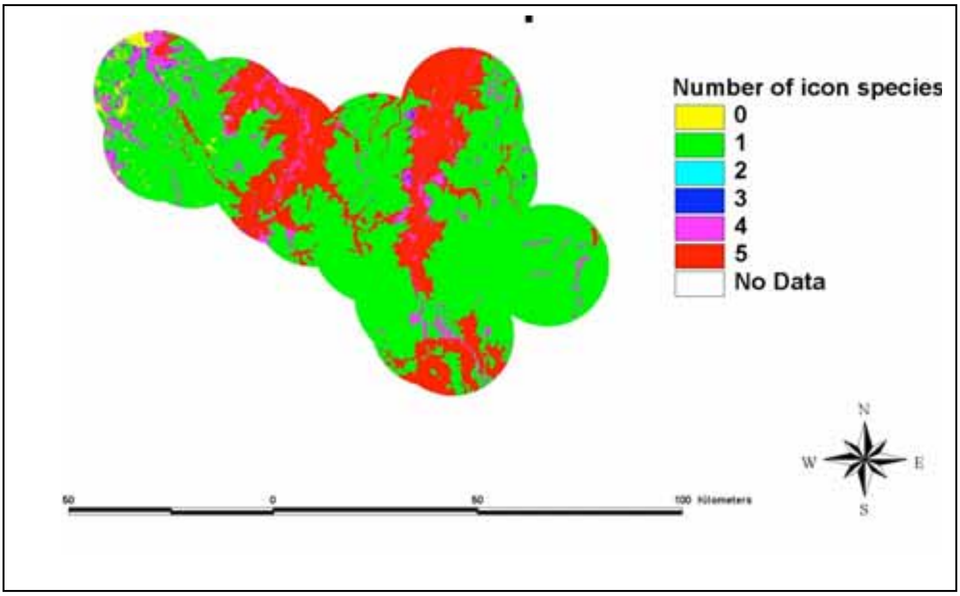

Figure 12
Index of wildlife attractiveness: Tourism buffer zone.

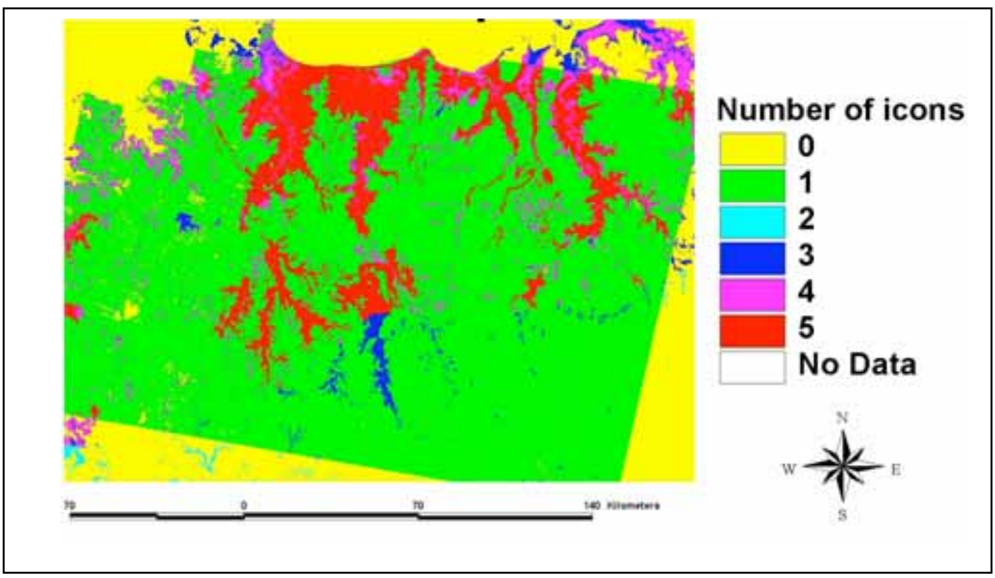

Figure 13
Index of wildlife attractiveness: Total.

The above concerns are magnified when the dynamics and regulation of ecological processes are interconnected with those of behavioural tourist characteristics changes in space and time. The space relevant for ecological research and for tourism activity is also different because the majority of tourists mainly operate along a few limited and narrow corridors (the highways and linking access roads into tourists spots) providing them with a linear relationship to the land, while ecological diffusion is best understood in two or three dimensions. Differences between the knowledge platforms are compounded by the fact that data is collected by different agencies at different times, by different researchers, for different purposes and use different units of analyses and samples.

This last obstacle becomes markedly conspicuous when one attempts to integrate as time series the dynamic relationship between tourism development and wildlife icon habitat changes. In the project proposal, discrete slices of five years (since 1980) seemed to offer meaningful opportunities to analyse changes in tourism infrastructure and flows in the region. Yet these cutting points may hold little significance for the sake of understanding ecological processes in the region examined. The sheer size of the area and the dynamic nature of the Top End wetlands is such that interpretation difficulties arise when trying to analyse results about land cover which are very sensitive to seasonal natural fluctuations, yearly variations in rainfall as well as the impact of fire regimes. Other more complex chemical and ecological processes less well documented – changes in coastal water salinity, invasion by introduced weeds and animal species, etc. – can also influence the land cover over the longer term.

When so many fundamental changes hold a great impact on landscape, it makes sense to focus on much smaller study areas in which speculations about the nature and sources of various transformations can be reasonably connected with documented discrete events. It has therefore been found that when ascertaining the main causes for land cover changes in Top End wetlands, natural vagaries have the ability to dwarf human effects. This is especially true when researchers can only observe discrete snapshots of the landscape and its environment.

Land use changes associated with tourism have been examined in other studies (for instance Allen et al, 1999) and they have led to predictions when clear trends could be established. In the Top End project, the needed detailed historical data was available only for the Mary River area where a more reasonable analytical scale could be used. Even then, establishing an empirical relationship between tourism and other human developments, land tenure dynamics and changes in land cover is anything but straightforward.

Conceptual Difficulties

For the sake of progressing the integration of wildlife and tourism knowledge, a number of complex difficulties need to be addressed. Recognising their importance and magnitude should help identify future research needs. A good starting point is to scrutinise more closely the various causal relationships that have been hypothesised to support the overall analysis. It is therefore necessary to investigate the reliability and stability of the following links:

1. Connections between tourist-stated preferences and attractiveness of locations
2. Connections between land cover (or landscape) attributes and presumed ecological habitat

3. Connections between habitat identified and presence of wildlife species
4. Connections between presence of wildlife species and observability of those animals by tourists
5. Dynamic connections between presence of tourists or infrastructure in the region and impacts on habitat or land cover, as well as wildlife species of interest

The first level of conceptual difficulties is discussed in Tremblay (2002, 2003). It is perhaps not a central concern in this paper as the choice of icons was supported by multiple tests, but it is clear that little reliable data of that nature can usually be found even in major recreational and tourism areas. It seems reasonable to presume that the identification of wildlife icons could be much more problematic in other locations than it was in the Top End. Furthermore in other places, different market segments would be better served by viewing different wildlife species mixes, and marketing ought to be considered an endogenous variable, which can be used to affect those mixes. With respect to the second and third types of connections, they constitute primary concerns for all ecological modelling focussed on predicting animal presence in various habitats. The degree of confidence in the reliability of the models depends on the scale of analysis (spatially and in terms of landscape variability) as well as the dependability of the ecological knowledge on which it rests.

The question of observability of the animals is central to the management implications associated with efforts to match the demand for wildlife-viewing opportunities with spatial and temporal factors that affect animal presence in various landscape, and their behaviour in those locations. The management of vulnerable habitats potentially holding conservation and recreational values must consider the possibility of trading off such values by investing in “managed natural environments”, which allow tourists to optimise the chances of viewing wildlife in acceptably wild-looking settings.

The last category holds the greatest challenges. Given the recent interest in the impacts of tourists on wildlife, one would expect that the development of large-scale management tools would constitute a priority. But conceptual difficulties with trying to establish the dynamic connections between tourism development and habitat transformations are more overwhelming in terms of both depth and breadth. It is clear at the outset that the project only attempts to establish a correlation in time and space between ecological and tourist-behavioural attributes and not causation. Many intervening variables operate concurrently within the analysed space. It is difficult to assess whether changes in the landscape have played a role in removing natural constraints, have impacted on tourist preferences or whether the tourists instead have themselves been a source of impacts on the landscape. Spatial inter-connections are numerous and their joint dynamic analysis is made especially difficult by the fact that other phenomena, some natural (natural disasters, climatic variability) or built (fire regimes, policy changes, politics) also operate on a scale and in manners which GIS techniques cannot differentiate. This has led some observers to suggest that the difficulties that appear are of such magnitude that the most reasonable approach to wetlands management in North Australia is likely to be investing in infrastructure and attempting to maximise tourism benefits (Baldwin, 2001).

Conclusions and Implications: Moving Ahead

While the challenges posed by attempting to integrate geographical, ecological and tourism behavioural knowledge remain great, the establishment of information systems capable of pinning down spatial and dynamic connections between bodies of information constitute a promising analytical platform. Although generally based on simplistic representations of the motivations to travel, it is suggested that modelling tourists as migrating bodies in search of suitable habitats (therefore akin to wildlife species) can advance predictions about their movements and allow greater understanding of their likely impacts.

Due to resemblances in the concerns with time-space connections, unavoidable similarities can already be found in the terminology of ecology and tourism planning fields. Ecological corridors can be contrasted to tourist corridors, while the identification of ecological hot spots and tourism hot spots point at interconnections through landscapes shared by tourists and wildlife species. The methodology proposed in this paper effectively broadens the parallels by identifying tourist-based keystone species capable of playing a critical role in establishing future economic values of some species (to safeguard their habitats), the same way ecological keystone species play a critical role in ecosystem processes.

More importantly, a GIS offers the possibility of testing the connections between types of knowledge that everyone recognises as relevant for land planning and management and yet up to now have remained excessively fragmented. Tourism is often hypothesised as playing a central role among processes of socio-economic globalisation assumed to increase disconnections between local cultural and natural knowledge (Hansson & Wackernagel, 1999). These are in turn assumed to prevent local stakeholders from comprehending, as much as acting, on resources decisions involving forces seemingly beyond their realm. Through GIS techniques, the project attempts to provide means to survey the research required to establish the relevant knowledge connections.

While necessarily based on simplified linkages between forms of knowledge, the final overall approach reflects the critical presumption that there is ultimately a two-way connection between tourist behaviour and the environment. Establishing (and perhaps engineering) feedback mechanisms between recreation-tourism consumption and environmental impacts requires that affordable methods be developed to assess priorities and scenarios in space and time. These have the potential to provide local communities with the ability to identify and contrast the values of various bio-systems through sustainable uses (including tourism and recreation), assess their vulnerability and predict the extent of pressures and threats to which they might become exposed.

It also constitutes an endorsement that socio-economic and ecological processes ought to be modelled as co-evolutionary (Bahaire & Elliott-White, 1999; Hansson & Wackernagel, 1999; Norgaard, 1994). In the context of tourism in particular, the sustainability of ecosystems and human systems are interdependent. Safeguarding ecological habitats depends increasingly on the design of socio-economic systems maintaining and protecting multiple values and uses in broad ecological regions, just as it depends on the ability to police conservation zones and adopt suitable resources management practices in target locations.

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Part 2

Tourism and Hospitality Education

Chapter 5

Escaping the Tyranny of Relevance

Some Reflections on Hospitality Management Education

By Conrad Lashley

Abstract

Higher education provision to meet the needs of management within the hospitality industry is now well established in most English speaking countries. In the UK the first degree programmes appeared in the late 1960s and burgeoned alongside the general expansion of higher education in the 1990s. This paper draws on recent reports on higher education for the hospitality industry, and on recent academic research into the nature of hospitality, to suggest that higher education programmes would better serve both students and industry if they reflected more social science underpinnings. Paradoxically, an overly managerial focus on content is not always consistent with the needs of manager education. Various studies suggest that reflective practitioners are needed for a turbulent and changing hospitality industry. The development of analytical and critical thinking skills are essential for managers who are increasingly being asked to "think outside the box". This paper argues that these skills are best developed in a framework of critical education which is as concerned with the study of *hospitality management as it is with the study* for *hospitality management.*

Introduction

In the United Kingdom students from hotel and catering management degree programmes began to enter the labour market in the early 1970s, and by the late 1990s there were more than 8000 students enrolled on 79 courses in 27 institutions (Airey & Tribe, 2000). The total number of graduates and diplomates in the subject was estimated to be between 2–3,000 per year (Higher Education Funding Council for England, 1998). The early degree programmes frequently emerged from technician level National Diplomas in Catering and Hotel Keeping, and as a consequence degree provision is concerned with developing vocational skills and is largely located in the post 1992 "new" universities created from former Polytechnics.

Almost from the onset industry commentators have been critical of degree provision. For example Miles Quest, a former editor of the Caterer and Hotelkeeper wrote several editorials, and addressed the 1988 HM Inspector's conference, criticising the need for degree level provision. In more recent years Gary Hawkes (2003) and Paul Slattery (2002) have been critical of hospitality management education provision though, recently, for different reasons. Certainly the atmosphere created by a trickle of industry sniping of higher education led the Higher Education Funding Council – England to undertake two pieces of research that will be referred to in detail later in this paper. Certainly the *Review of Hospitality Management* (HEFCE,

1998) and *Getting Ahead: graduate careers in hospitality management* (HEFCE, 2001) represent the most systematic attempts to understand the nature of higher education and the impact this has within the firms actually employing graduates in industry.

This paper explores some of the issues arising from these reports and from other work undertaken by the author on the nature of management in hospitality businesses. The paper also suggests that recent work exploring the nature of hospitality from an array of social science perspectives provides opportunities to support the development of those being prepared *for* management in the hospitality industry by encouraging the study *of* hospitality and management through critical and theoretical perspectives. It advocates that the hospitality field of study needs to refocus so as to reflect these social science perspectives and suggests that Hospitality Studies as a title for the field provides an opportunity to encompass the study of and the study for hospitality.

Hospitality Management Education

The *Review of Hospitality Management* (HEFCE, 1998) defined hospitality management as ‘having a core which addresses the management of food, and/or drink, and or accommodation in a service context’ (p2). When all these activities are taken into account, hospitality activities employ approximately two million in Britain (HtF, 2002), and the Henley Centre (1996:15) suggested that for each hospitality job a further 1.3 jobs are created in support services in the wider economy. The report acknowledged that the industry is complex, covering different sectors – hotels, restaurants, pubs and bars, and contract catering as well as provision in the welfare sector and some leisure units where hospitality services are a subset of the operation. Small firms dominate commercial sectors of the industry. Some 99 per cent of hospitality firms in these sectors employ fewer than 50 people, yet these firms account for only 45 per cent of total sales and 50 per cent of employment (Thomas, Lashley, Rowson, Guozhong, Jameson, Eaglen, Lincoln, & Parsons, 2000). At the other end of the scale, in each of these commercial sectors a small number of branded businesses own and manage hundreds or thousands of units. These businesses offer management careers in multi-layered organisations at individual unit, multi-unit, middle, and senior management positions.

The report confirmed that courses were designed to match these occupations and incorporated a mixture of operational management subjects together with topics that supported the development of management competences in people management, marketing, finance, business strategy, small firms and entrepreneurship. It was recognised that programmes showed some variations between institutions but much of the provision had common content and objectives.

The report was undertaken at a time when the Higher Education Funding Council – England was considering the introduction of a revised mechanism for funding courses which potentially would have placed hospitality management programmes in the lowest funding band, along with programmes that are solely class room based. In fact the report showed that all courses included some element of “laboratory” time in kitchens, bars, restaurants, reception and accommodation suites. Litteljohn and Morrison (1997) estimated that on average 23 per cent of students’ contact hours at university or college were spent in laboratory situations and 64 per cent of these in food and beverage activities. In addition, most courses incorporated a one-year work placement as part of the programme.

Although the number of graduates in the late 1990s was estimated to be between 2–3,000, numbers on hospitality management programmes have reduced in the last few years. New competing programmes in "licensed retail management", "event management" and "leisure management", together with the impacts of the introduction of student fees and changes in university management structures have reduced student enrolments even at a time of increased participation in university education. The number of graduates entering the labour market in 2002 was closer to 2000 than the higher figure shown above. Given an estimated 250,000 managers employed in accommodation, bars and restaurants services alone (Hospitality Training Foundation, 2000) it is still true to say that, 'there is no question of graduates flooding the market' (HEFCE 1998:15, 1998:8). Commenting on graduate entry into the industry, the same report stated that, 'initially, 80 per cent went into work connected with the industry' (p7). However, most educators are also aware of the strong competition for hospitality graduates from traditional high street retailers who like the array of skills they possess.

The report acknowledged a failure in communication with industry at large that has sometimes resulted in comments from practitioners that educators produce too many graduates, and that not enough of these go into the industry. The somewhat contradictory nature of these comments is in part a reflection of these communications failures but also a reflection of the relatively low level of graduates working in the industry. This stands at just 5.5 per cent of all employees and employers, compared with 17.9 per cent across all industries (HtF, 2000). It is estimated that 20–30 per cent of managers in the hospitality industry are graduates, hence some seven or eight out of ten practicing managers are not graduates and have no higher education.

Whilst acknowledging these communications difficulties with the industry at large, Airey & Tribe (2000) describe hospitality courses as being prominently influenced by industry. 'The emphasis on practical and industry-oriented content is clear from module titles, such as food preparation techniques'. The Council for National Academic Awards (1992:7) suggested that these programmes 'combined a range of business studies components' as well as more generic management studies and 'these are combined with specific hotel and catering studies which invariably include a science element' (Council for National Academic Awards, 1992:7). Airey and Tribe note that over recent years course titles have shifted from hotel and catering management to include hospitality, and whilst they recognise the change in title opens up a wider conceptual framework, 'at the same time it is clear that the vocational orientation remains at the core of the curriculum' (2000:282). In fact they go on to establish these programmes as located in the *vocational action* quadrant when higher education provision in general is mapped against two continua – stance as reflection/action, and ends as liberal/vocational. This is shown in Figure 1.

Ends \ Stance	Reflection	Action
Liberal	Reflective liberal	Liberal action
Vocational	Reflective vocational	Vocational action

Source: Airey & Tribe, 2000

Figure 1
The use of curriculum space.

They suggest that whilst this meets the needs of industry and employers, these programmes can be criticised as being ‘dominated by the tyranny of relevance’ (2000:290). The study of hospitality in its broadest sense provides opportunities to locate the subject in the wider social sciences, and provide a more reflective agenda for educators. Certainly the link with industry and the vocational aims of these programmes locates them within one of several potential positions in higher education provision.

These potential positions will be discussed in more detail but the tyranny of relevance is further compounded by the learning style preferences of students entering hospitality management programmes. There is now a weight of research in the UK and internationally (Lashley, 1999; Lashley & Shaw, 2002; Barron & Arcodia, 2002; Lashley and Barron, 2003; Charlesworth, 2003) showing that hospitality management has a predominant preference for Activist learning styles (Honey & Mumford, 1986).

Honey and Mumford point out that Activist learners are at an advantage when they are in contexts where they are working and, therefore, talking with other people. They enjoy contexts where there is a great deal of variety and situations are difficult to predict. Many aspects of the hospitality working environment could be said to match these requirements. Often, demand is difficult to predict precisely. Unusual customer requests, or customer complaints require quick responses, and the work usually involves immediate contact with other employees and customers. Hospitality management university programmes prepare graduates for specific occupations and Activist learning styles could be seen as compatible with this type of programme.

However, Honey and Mumford (2000) also identify some drawbacks to the Activist learning style. They suggest that Activist learners tend to rush into things, they avoid planning work in advance and tend to neglect subjects in which they are uninterested. Often they leave things to the last minute and have difficulty prioritising. Frequently they have poor time management skills, and can’t be bothered with details. For both students and managers these disadvantages to Activist approaches can lead to poor performance. Furthermore, substantial numbers of UK and Australian students register low or very low preferences for Reflector and Theorist styles, which presents added difficulties when research from both industry and academia suggests ‘reflective practitioners’ are required for effective performance (Lashley, 1999; Lashley & Barron, 2003). Certainly educators need to adopt strategies that challenge both the “tyranny of relevance” and the reluctance of many students on hospitality management programmes to reflect and theorise. The pleasure in action, and reluctance to reflect are implicit in a number of research projects exploring current management practice and in some of the comments referred to earlier. A recent study of employment practice in hospitality firms in Manchester's tourism sector (Lashley, Thomas, & Rowson, 2002) and an earlier study of staff turnover in the pub sector (Lashley & Rowson, 2000) suggest many managers are prepared to put up with staff retention difficulties without reflecting on why staff are leaving. In one extreme case, a manager interviewee reported recruiting 286 employees for a normal establishment of 50 job roles. There appeared to be little reflection in this practitioner's performance (Lashley & Rowson, 2000).

Several reports and academic studies about hospitality management programmes in the UK show 'widespread and mature links with industry' (HEFCE 98:15, 1998:15). The link to tightly defined occupations does bring with it problems, because there can be a tendency to make programmes overly pragmatic and reinforce student tendencies to avoid reflection and theorising. Although it is possible to address these problems within the current programme structures and subject titles (Lashley, 1999), this paper suggests there is a strong case for broadening the curriculum, so as to embed reflective practice in the student's development. This view is supported by a recent report on graduate careers in hospitality management.

Hospitality Management Careers

The applied nature of the programme content and the relevance of content to careers in hospitality management were confirmed by a follow-up report commissioned by the HEFCE. *Getting Ahead: graduate careers in hospitality management* (HEFCE, 2001) was commissioned by the Higher Education Funding Council – England to explore some of the concerns raised by industry commentators. One of the key aims of the research was to explore management careers in the hospitality industry with specific reference to the impact that higher education qualifications have on management careers. The research also aimed to explore the nature of work and skills required of managers in the industry, with a view to exploring the extent to which current curriculum and educational practice in higher education met the needs of managers, and the value of a higher education to stakeholders.

The research team adopted a sector-based approach to the analysis of management career paths and the contribution that qualifications make to careers. This involved the production of six detailed sector reports and also a final report that combines the analysis from all the sectors studied and reaches overall conclusions. The sector reports covered licensed retail, hotels, restaurants, contract catering, welfare catering and leisure. All these reports are available through the HEFCE's web site (www.hefce.ac.uk).

Using a case study methodology, each sector report was based on the detailed study of key hospitality organisations identified as representing different operations typical of that sector. The individual organisation studies included in-depth interviews with key senior personnel, life histories from managers in representative positions, and questionnaire results from a range of managers. Reports from each sector study therefore include data from all of these sources.

The research gathers detailed data about management careers in the six sectors through thirty case study organisations and approximately 150 interviews with mangers holding key positions within the management hierarchy. In addition the report gathered information about management career training and development from 1396 small firms through a postal survey integrated into the small firms survey undertaken by Leeds Metropolitan University (Thomas, et al, 2000).

The report confirmed that the education background of the managers being interviewed strongly influenced their perception of graduates and their potential contribution to the organisation. The report quotes several cases where senior executives who were graduates themselves, employed graduates in large numbers. The report quotes one CEO as saying, (2001:20) 'changes in the last few years require us to be more qualified. In the business world a degree is recognition that someone can think outside of a square and can write and add up with dexterity'. This firm had a more qualified management structure than in many other firms in the survey. The report also noted that the small firms survey showed that graduate owner managers were more than twice as likely to employ graduates. Further, owner managers with a degree were more likely to employ graduates in managerial rather than operational roles.

Managers who had been promoted through experience did not value graduates or the skills they might contribute. In several cases, managers interviewed reported that graduates were treated with suspicion and that they were dismissive of the benefits a higher education might provide. The report went on the say, 'Non-graduates knew almost nothing about hospitality degrees and tended to overplay the aspirations of graduates believing they would only want high level jobs and would not want to get their hands dirty.' Several managers in the sample believed that graduates 'expected too much too early' (p20). Several interviewees commented on graduates being 'too intellectual' or being unwilling 'to roll their sleeves up' (p20). In some cases interviewers were told that non-qualified managers liked to 'expose inexperienced graduates' (p20). Managers without qualifications were also more likely to accuse graduates of wanting to be promoted too quickly and of being unwilling to learn the business. In fact interviews with graduates themselves were reported as confirming, 'most of them were realistic about what was required of them ... They realised that their degrees were not a passport to anything and once in their first job would be judged on their performance' (p20).

Interviews with senior managers in large organisations, and results from the questionnaire data from small firms suggested that those actually employing graduates are highly satisfied with graduates. Hospitality graduates were frequently favoured over other disciplines, mainly because hospitality graduates 'understood the industry' and 'were more likely to stay the course' (p18). A principal officer in social services said 'I recently conducted interviews for a management post and one of the ladies I interviewed had a degree in hospitality management. I noticed that she was much more confident and had more transferable skills than some of the other candidates and this made her the best candidate for the post' (p18). One hotel manager spoke of hospitality graduates' 'passion' (p18) for the hotel industry. Commitment from hospitality graduates was seen as very important and one hotel manager who was interviewed said that this gave hospitality graduates 'the edge' (p18). Even the owners of small firms employing graduates expressed high levels of satisfaction with the graduates in their employ. When small firm owners employing graduates were given a series of positive and negative comments about graduates, over 90 per cent agreed with positive statements and substantial minorities disagreed with the negative statements.

The report confirmed that qualifications have a large impact on careers in hospitality management, though this varied between sectors. It was clear that in the larger organisations there were points in the hierarchy that could not be passed without a degree qualification. Increasingly the most senior managers were expected to have MBAs or some other postgraduate qualification. The importance of a degree at unit management level varied between organisations. 'Interviewees were unanimous in recognising the key importance of management skills at unit management level' (p15). Many organisations were requiring unit managers to be 'more entrepreneurial' and recognised that unit managers were often running substantial businesses in their own right. In these cases, they recognised the qualities that a graduate could bring to unit management. In other cases, graduates were expected to undertake unit management though they might ultimately be destined for more senior management positions. The report stated, 'As the industry continues to develop and managerial roles and companies become more complex, the nature of the unit management role will also increasingly require the skills and knowledge that graduates bring'. This observation is interesting considering Paul Slattery's recent criticism of hospitality educators at the Council for Hospitality Management Education's recent conference (May, 2003). His other criticism, that there is an over concern for operational issues in these courses, is also not supported by the evidence from these interviews.

One of the key areas for criticism by self appointed critics of higher education provision is that it is not providing the food and beverage skills that the industry requires. This point is frequently made Gary Hawkes and a string of others. The report observed, 'It would appear from this research that these accusations are groundless and that current higher education practice of moving away from developing technical skills to a detailed appreciation of operating systems and concepts is actually what the vast majority of the industry now requires of its managers' (p7). Managers are much more likely to need to consider the vagaries of popular cuisine and its impact on restaurants than how to butcher a side of beef, or knock out frangipan. Managers in the early stages of their careers need to be able to cope with the technical operational complexity of hospitality operations, 'but it is only at the extremes of the industry that high level technical knowledge and skills are really required' (p7). That said, it is highly unlikely that managers are required to regularly step in to an operational role to replace a member of staff, and if they are, there are considerable opportunity costs because managers are not doing important tasks.

The report commented on supposed skill deficiencies of graduates, 'In fact there is no evidence to suggest that graduates from hospitality management programmes are demonstrably deficient in any of the skill areas identified by industry as important in line managers' (p6). The report confirmed that people management skills were very important in the industry and although graduates were given a good grounding in this, it was recognised that these skills were ultimately developed with experience. Whilst the report acknowledges the criticism that higher education was overly academic and limited in its concern for developing practical skills, the research found that, 'The clear message from all industry sectors, both public and private, was that business acumen and commercial awareness is fundamental to the future success of managers at all levels and to the success of the industry as a whole' (p6). Again, the evidence from these interviews is that graduates are well prepared in business skills and commercial acumen.

The report also pointed to the transferable skills elements of programmes. The ability to communicate effectively in a variety of forms was seen as an important skill developed in higher education. Whether preparing a formal report for senior executives or presenting a team briefing to service staff just before opening, graduates stand out as offering a range of skills that others may not have developed. As industry moves to a more devolved pattern of management, all managers need to be able to tackle and resolve day-to-day operational problems as well as those of a more tactical and strategic nature. Again graduates are seen as offering competence in this area.

The industry continues to change rapidly and the role of managers along with it. Part of this change signals a move to empowered and participative forms of management. Although some companies, particularly in the hotel sector, strongly favour graduates from the more controlled regime of the 'hotel school' many others are looking for people who can think 'outside the box' (p5). The interviewees from across all six sectors confirmed the view that they were looking for people who are flexible and are able apply a range of skills to complex and changing situations. Specific technical skills and knowledge were much less important than an ability to analyse and resolve problems or unexpected situations as they arose. Recent events such as the foot and mouth, and BSE crises, and the down turn in tourism following high profile terrorist attacks confirm just how important these skills can be when events in the environment result in sudden shifts in consumer demand.

When managers were questioned on the advantages of employing a graduate they focused on features that are best described as the qualities of 'graduateness', such as intellectual ability, powers of analysis, speed of thinking, the application of a range of ideas and concepts, and the 'fresh eye' that graduates can bring. One manager in the restaurant sector believed that graduates brought a 'wider vision' to the company. The report observed, 'hospitality graduates themselves had different views of the usefulness of their degrees. They valued the general transferable skills which a degree had provided, and specifically mentioned the work placement experience. Graduates believed that they were more 'prone to think before acting' compared to their non-graduate colleagues. Some of them also believed that having a degree improved their speed of progress and ability to do a job effectively' (p20).

Some graduates commented that a degree formed the basis for learning by subsequent experience. Specific skills that graduates believed they had acquired whilst undertaking their degrees included writing skills, presentation skills and time management skills. In general, graduates thought that completing a degree had taught them to be more self-disciplined and had increased their self-confidence and motivation. Most graduates felt that their degree had helped with career progression and had provided them with a stepping-stone into their first managerial job.

Although there was some criticism of higher education's tendency to focus on hotels at the expense of other sectors, the main report and the six sector reports suggest a positive match between higher education provision and careers in hospitality management. Indeed some might conclude that as these programmes are meeting industry needs they do not need changing. 'If it ain't broke don't fix it', to use the well-known American phrase. Unfortunately, there are sound academic and educational issues which now need to be addressed. Both industry practitioners and graduates themselves value the intellectual skills and qualities of the reflective practitioner. Award titles need to reflect a curriculum that is more concerned with developing theories and laying down understanding of scientific principles. The subject of hospitality needs to be studied as a social phenomenon so as to better understand its commercial context. For some, the subject is now at a crossroads (Botterill, 2000; Brotherton & Woods, 2000; Morrison, 2002) and there is a need to break out from the vocational action domain (Airey and Tribe, 2000).

Hospitality Studies

The model developed by Airey & Tribe (2000) and displayed in Figure 1 suggests several potential directions for future development. Clearly the development of 'reflective practitioners' is consistent with the 'reflective vocational' dimension of the Airey and Tribe model. One option is to develop a study programme that increases the theoretical and conceptual underpinning of hospitality activities. Fundamentally, however, hospitality educators need to develop the academic study of hospitality as a way of better informing the management of hospitality (Brotherton & Wood, 2000; Morrison 2002). Morrison (2002:163) says, 'If hospitality management research is to progress, those associated with it must reflect more deeply over its essential nature and practical manifestations', and Brotherton and Wood (2000) argue that there is an urgent need for both researchers and practitioners to challenge complacency and unquestioning mindsets. Morrison (2002:163) goes on to say that as an academic discipline, hospitality '… may benefit from introspection in the sense that its very epistemological basis and the conceptualisation of its nature, incidence and forms … liberate it from current functionalism'. Whist this paper is largely concerned with programmes of study, the nature of the academic field of hospitality is at the heart of programmes of study. Fundamentally, hospitality must be established on a sound social science base. The current preoccupation with management and relevance to industry is an intellectual cul de sac, or as Botterill (2000:193) describes it, 'a closed expert system in which experts speak to experts in an ever decreasing circle, defending conventional ways of gaining knowledge.'

In Search of Hospitality: theoretical perspectives and debates (Lashley & Morrison, 2000) opened some avenues of study linking back into social sciences. Hospitality and hospitable behaviour are key aspects of human society and as a consequence, a broad array of social sciences can contribute to our understanding of the subject. Though some find the line of enquiry somewhat arcane (Slattery, 2002), the study of hospitality from the social and private domains does have relevance to commercial practice and hospitality management. Warde and Martins (2000) show that consumers are often evaluating commercial hospitality settings against expectations gained from private settings, and they suggest hospitality in the private domain is seen as more authentic. Another recent study of the emotions of hospitality through special meal occasions (Lashley, Morrison, & Randall, 2003) suggests that the relationship is more complex. Findings show that the language of private hospitality is used to evaluate feelings in commercial hospitality, being made 'to feel at home', 'the host made us feel welcome' and 'there was a homely feeling to the setting.' However, people will choose either private or commercial settings for their special meal occasions depending on what they want from the occasion. Lynch and McWhannel's (2000) excellent work on 'commercial homes' also provides some interesting insights into the relationship between commercial and private hospitality within this under researched but highly significant sector. Bed and breakfast, and guest house settings embrace the commercial, the private and social domains of hospitality and exhibit some significant tensions that need to be understood in this important segment of tourism provision. The study of hospitality in its various domains (Lashley, 1999) has direct relevance to the commercial provision in the hospitality industry, and social scientists provide valuable insights into ways of thinking about and analysing the world.

Selwyn (2000), for example, gives some valuable insights into the anthropology of hospitality. This allows future managers to appreciate the different cultural perspectives on hospitality and the social significance accorded to hospitality and hospitableness in different societies and at different times. Similarly Telfer's (2000) work on the 'philosophy of hospitality' provides valuable perspectives on the topic and also on how philosophers develop ideas that can improve reflection amongst practitioners. Walton's (2000) *The British seaside: holidays and resorts in the twentieth century* is another example of an insightful account of the social, political, economic, and technical influences that led to the growth and decline of British seaside holiday resorts. Managers of the future will make use of the sense of history and the forces at work in society that a social historian engages.

These are just some of the avenues opened up in the book, providing opportunities for educators to build a more analytical framework from which to study the management of hospitality operations. So if hospitality education is to be located in the more 'reflective vocational' domain of the Airey & Tribe (2000) model, there is ample material to draw upon. The work of sociologists, social historians, anthropologists, philosophers, social psychologists, and organisational behaviouralists, for example, all have contributions to make that enhance our understanding of the concepts and theories that influence both hospitality organisations and the contexts in which they operate. Theory aids reflection and informs practice (Kolb, 1983), thereby reinforcing the development of the reflective practitioner and providing the flexible mindset capable of reading and responding quickly to change in the environment.

In fact we could go further. Tribe (2002) suggests that tourism educators need to go beyond the concept of the reflective practitioner so as to develop 'philosophical practitioners'. Using the two continua supporting the model in Figure 1, Tribe argues that there is a need to engage reflection and action, as well as vocation and liberal dimensions in education programmes. This approach has the virtue of producing more rounded graduates. It suggests a powerful means of releasing hospitality educators from the tyranny of relevance.

Educators should not be afraid to follow studies that may not appear directly relevant to the subject specialism. Nor should they be afraid to describe themselves as intellectuals. Their duty is to develop in students a strong spirit of enquiry that will support a commitment to life long learning. If this goal is achieved, graduates continue to develop, learn and adapt to changing circumstances throughout their lives. This point is fundamental to the purpose of education and the educator's duty to students. Most educators enter the profession because they have a commitment to knowledge and want to pass on this enthusiasm to others. Although preparing people for particular occupations educators should not forget their duty to students as individuals. The tyrants of the relevant should not be allowed to deflect educators from their responsibility to empower students through education and the pursuit of knowledge.

Similarly educators need not be afraid to express professional judgements about the nature of the curriculum and the sort of people required for the hospitality industry. The tyrants of the relevant want hospitality education to be tied to 'bench mark statements' (QAA, 2000) and other supposed predictors of the knowledge and skills possessed by hospitality graduates, as though they were cup-a-soup managers instantly industry ready on graduation. They see higher education as just another supplier, requiring product specifications so that employers know what they are getting. The problem with this view is twofold. Firstly, judgements are always historical and usually influenced by the commentator's own working context. So the fact that Hawkes and Slattery criticise higher education for quite different reasons is a product of their mutual inability to see the bigger picture and the array of interests that educators service. Hawkes criticises higher education for paying too little attention to operational and technical skill development, whilst Slattery's concern is that there is too much, and not enough preparation for the Board Room.

The second problem is that tyrants of the relevant do not always know what it is that they do not know. Their perceptions of the skills needed and the qualities required of managers are limited by the boundaries of their own knowledge. A recent research project exploring skill shortages and skill gaps in Manchester's tourism sector (Lashley, Thomas & Rowson, 2002) identified a number of undeclared and latent skill gaps amongst hospitality managers facing recruitment and retention problems. Not one of the interviewees recognised their own skill deficiencies in labour management practices or in the skills needed to develop Manchester as a quality tourism destination. Rowley et al, (DfEE, 2000) make a similar point in their study of hospitality skills. They suggest that there was no evidence of a deliberate reluctance or unwillingness to report skill deficiencies, rather they were a result of managers' own limited perceptions. They went on to say, 'We found few managers who thought outside the traditional modes of operating, or anticipated how new technology could and would impact on their business in the medium-to-long term. There was a widespread failure to appreciate the importance of foreign language skills in this tourist related industry. All of these deficiencies reflect the most fundamental deficiency of all: managerial skills at all levels' (DfEE, 2000: 12).

In these circumstances educators need to take the lead and make some judgements about the curriculum, and the skills and mindsets they are trying to develop based on professional judgement and research. They have to resist being entrapped by the overly slavish commitment to the relevant, and develop approaches that are required by graduates as citizens, empowered individuals, and as employees and employers in hospitality management roles. Tribe's notion of the 'philosophical practitioner' is an extremely attractive one. It suggests an attention to the personal needs of individuals and the development of the qualities of graduateness that industry will need in the future. Tribe's concern is for the development of tourism practitioners who will make up a 'creative and reflective workforce to further the debate about the destiny of the tourism world, and an active workforce to create a tourism society that has been deeply thought through' (2002:354). These words might easily be adapted to express ambitions for hospitality graduates. They offer an alternative strategy to the tyranny of relevance and imply that educators might advocate a 'critical social science whose aim is to transform' (Botterill, 2000:194).

The study of philosophy, sociology and social psychology are topics that need to be included in hospitality management education. Philosophy teaches individuals various ways of thinking and analysing situations. Sociology develops an understanding of society and the social forces that shape events, and social psychology helps explain behaviour of individuals, groups and organisations. A similar case could be made for teaching art and drama to those destined for hospitality occupations. That said, the key point is the need to focus on the education of rounded flexible, intellectual young men and women who will bring both critical thinking and a life long commitment to learning to their working lives. Ultimately it is these qualities of graduateness that are required by all involved.

This section has suggested a number of possible ways that hospitality education can escape from the tyranny of relevance. An essential first step is to move away from hospitality management as a title for these awards, sections, departments, and professional bodies. ‘Hospitality studies’ allows a more rounded study *of* hospitality and thereby better informs the study *for* hospitality. This title suggest a more all-embracing definition if we allow *of* and *for* dimensions. It resolves the somewhat false dichotomy of hospitality management *or* hospitality studies (Taylor and Edgar, 1996), because the study *of* hospitality allows for a general broad spectrum of enquiry and the study *for* allows studies that support the management of hospitality. A comparison with ‘business studies’ reveals a similar approach in the provision. Some content develops critical and analytical skills whilst other elements deal with the more pragmatic topics concerned with managing businesses.

Conclusion

It is not surprising that hospitality management education has been ‘a contested terrain’. Its origins in a diverse yet rather under-educated industry has meant that a number of self appointed commentators have called for higher education for the hospitality industry to be carved in their own image, and many have remained suspicious of graduates and theorising in general. The consequence is that courses in hospitality management tend to be ruled by a sort of crass pragmatism summed up by Airey and Tribe’s phrase. Paradoxically, this somewhat slavish concern for industry relevance is neither in the long-term interest of the industry nor of the graduates as future managers and citizens.

Two recent reports provide a systematic understanding of the current features of hospitality management education and the impact of a higher education on careers. The first report describes programmes that are in effect applied management studies with a significant proportion of laboratory work performed in specialist areas, through which students develop technical and operation skills. This report also showed that programmes involve a high degree of contact with industry through formal work placements, and through informal student experiences in part-time and holiday employment. The second report looked at management careers and the impact of a higher education on careers. It revealed increasingly sophisticated management structures within the industry with growing use of graduates at all levels of the organisation. It also showed the key benefits of employing graduates were in the ways of thinking and the transferable skills they brought with them. Most importantly, many interviewees commented on the need for future managers to be flexible and able to ‘think out of the box’. Both reports do however confirm that hospitality management programmes are locked in a culture of pragmatism that creates an inadequate base for the academic development of hospitality as a field of study.

This paper argues that hospitality educators need to develop courses that move away from the somewhat restricted programmes concerned almost exclusively with subjects deemed to be relevant to hospitality management. A more explicit concern with developing students’ intellectual abilities will better serve both the industry and individuals. Whether educators choose to articulate this through the metaphor of the 'reflective practitioner' or the 'philosophical practitioner', a change of title to Hospitality Studies allows a study *of* hospitality that better informs the study *for* hospitality. Fundamentally, engagement with the study of hospitality through an array of social science disciplines will secure a more substantial foundation on which to study for hospitality management.

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Chapter 6

What Tour Guide Stories Can Tell Us About Learning, Education and Training

A Case Study in the Top End of the Northern Territory

By Alicia Boyle & Allan Arnott

Abstract

A recently completed project supported by the Cooperative Research Centre for Sustainable Tourism investigated ways in which tour guides operating within Kakadu National Park have learnt to do their job. Like workers in any workplace, tour guides are constantly learning on-the-job, most commonly by informal and incidental means. In an increasingly regulated and litigious tourism operating environment, the level of actual uptake of formal education and training is low and the appropriate skilling of this sector of the tourism industry remains inconsistent. The practices of tour guides as they have developed in their work context can provide a framework for the development of education and training 'programmes' that are embedded in the way tour guides work and learn. A better understanding of these learning processes provides information as to how tour guides in the context studied could be supported in their learning and how formal education could better adapt and utilise such approaches.

Introduction

The background for the study described in this paper is situated across a number of dimensions or contexts. At the global level tourism is currently the world's largest industry, generating 12% of the global gross national product and employing 8% of all workers (Newsome et al 2002). Meanwhile, Australia is expected to receive increasing numbers of tourists – over 5 million visitors – in 2004. To this scenario it can be added that tourists are becoming more discerning, sophisticated and responsible (see for example Poon, 1993 and Weaver & Oppermann, 2000).

It is also apparent that tour guides make a significant and important contribution to the overall visitor experience at wildlife-rich destinations and at individual attractions. The principal role of guides is to enhance the experience of the visitor through information, given in an interesting, informative and culturally sensitive way. Weiler and Ham (2001) have made repeated reference to the importance of the quality of the interpretation offered by tour guides to the level of visitor satisfaction.

Weiler and Black (2002) and Black and Weiler (2002) suggest measures that may help to ensure that guides can competently fulfill their roles. These contribute to quality assurance among those working in tourism and include codes of conduct, support from professional associations, accreditation, certification, training, licensing and formal training programmes.

The current lack of guide requirements and generally poor uptake of available training opportunities does mean that the current standards of guides are highly variable, and often inconsistent both between companies and privately operating guides. Issaverdis (2001) suggested that consideration should also be given to linking accreditation with education and staff development programmes such as formalised training. Mandatory national licensing of guides is unlikely to occur in the near future, with Government policy tending to shy away from compulsory 'regulatory' requirements and tending to encourage industry self-regulation through voluntary accreditation schemes and Codes of Practice/Conduct (Crabtree and John Myers and Associates, 2000).

Although many authors have acknowledged the importance of guides in the development of tourism (Cohen, 1985; Pearce, 1984; Weiler et al, 1991), research into the training needs and provision of appropriate training for tourist guides has not been undertaken (Gurang et al, 1996; Weiler and Crabtree, 1998).

In essence, the tourism industry is an important industry that will continue to grow in Australia, with tourists becoming more sophisticated and demanding more professional and thus better educated and trained guides. However, the movement in Australia to ensure high guiding standards through training and accreditation is at best patchy. The study that is articulated in this paper set out to investigate a group of tour guides to discern how they gained information and engaged in learning. It was felt that if such processes were better understood then the uptake of formal education and training, and the ‘capture’ of current tour guide knowledge (through Recognition of Prior Learning (RPL)) may be improved.

The conceptual field in which the study is situated is that of workplace or situated learning, although Hagar (1997) states that ‘the term ‘workplace learning’ is ambiguous. It can refer to formal-on-the-job training as distinct from off-the-job training in, for example, vocational education institutions. However, ‘workplace learning’ can also refer to the informal learning that occurs as people perform their work.’ Billett (1996) defines workplace learning environments as “arenas” of activity in which socio-culturally determined practice occurs with that practice being shaped by the requirements of the particular workplace situation. Brooker and Butler (1997) suggest that the successful establishment of a community of practice enables the workplace learner to appropriate the culture, values and ethos of the workplace whilst simultaneously providing a framework for interaction between learners, trainers, and other more expert workers. Both Lave and Wenger (1991) and Harris et al (1998) indicate that this involvement in workplace communities of practice is largely unplanned and unstructured.

The interest in informal learning has sparked the need to develop more holistic strategies to link informal workplace learning with structured formal training, so as to create a richer set of learning and training pathways. Workplace learning experiences are structured by the requirements of work practice rather than the practice of educational institutions. The knowledge constructed in workplaces is likely to be different from that constructed in the classroom, rather than being inherently inferior. What is important is that these constructions are directed towards developing transferable vocational knowledge that is purposeful for the individual and the enterprise in which they are employed.

As such, this paper reviews the contexts in which the study took place, the study’s methodology, and a review of results. This is followed by a brief discussion of an example of possible directions and improvements to tour guide learning, education and training.

Research Contexts

As noted above, a variety of contexts interact to produce a situation in which aspects of tour guide learning and its impact on formal education and training become crucial. A brief review of these contexts, set out below, provides background to the study in question.

The industry context

In 1995, the World Travel and Tourism Council (WTTC) in Newsome et al (2002) reported that tourism was, at the time, the world's largest industry, generating 12% of the global gross national product and employing 8% of all workers. Globally, the current growth rate of the industry was quoted in 1998 by the World Tourism Organisation (WTO) in Newsome et al (2002) as 4%, with natural areas tourism being the most rapidly growing segment, generating approximately 20% of all international travel expenditures. Australia's future tourism export earnings are forecast to increase by an annual rate of just over 5 per cent from $18.9 billion in 2005 to around $27 billion in 2012 (Australian Tourist Commission, 2003).

The domestic tourism market accounts for around 76% of total tourism expenditure in Australia (approximately 50% in the Northern Territory). Over the next ten years business travel is forecast to grow at an annual rate of 3.8%, with both holiday and visiting friends and relatives travel increasing slowly at 1.6% (Northern Territory Tourist Commission, 2003). Tourism is a vital sector of the Northern Territory (NT) economy, a sector that directly supported 8,416 jobs in tourism in 2001/2002 and supported a further 6,663 people in jobs as a result of tourism. Furthermore, the industry directly injected $1,027 million into the NT economy in 2001/02 and indirectly contributed an additional $993.7 million (Northern Territory Tourist Commission, 2003a). Tourism accounted for 5% of Northern Territory's overall Gross State Product, a greater proportion than in any other State or Territory in Australia, clearly illustrating the importance of the tourism industry to the Northern Territory relative to elsewhere in Australia. Total visitor numbers to the NT grew by an annual 4% between 1996–2001, reaching 1.58 million in 2001. Holiday visitors accounted for 63% of all visitors, visiting friends and relatives (VFR) 14% and business travel 11% (Northern Territory Tourist Commission, 2003b).

The tourist context

As a consequence of the growing environmental movement, consumers are becoming more discerning, sophisticated and responsible when it comes to travel decisions and behaviour. The new traveller, or what Poon (1993) described as the "new tourist", is now a recognisable and significant segment of the tourist market that is expected to increase rapidly in both absolute and relative terms over the next few decades. In fact, the new traveller could eventually emerge as the core tourist market, replacing the conventional mass tourist (Weaver and Oppermann, 2000).

Weaver and Oppermann (2000) have provided the following as characteristics of the "new" tourist: green consumer, sensitive to local cultures, conscious of social justice issues, more independent-minded and discerning, knowledgeable about environmental issues, prefers flexible and spontaneous itineraries, carefully assesses tourism products in advance, in search of authentic and meaningful experiences, wishes to have a positive impact on the destination, motivated by a desire for self-fulfilment and learning and searches for physically and mentally challenging experiences.

The local context

Nature-based tourism is the core of the NT tourism industry. Natural attractions and nature-based experiences on offer in the NT provide a competitive advantage for attracting visitors to the Territory. This fact has been recognised in the NT Tourism Strategic Plan 2003-2007 (Northern Territory Tourist Commission, 2003a). The focus of this project has as its location, Kakadu National Park. Situated 200 kilometres south east of Darwin, Kakadu National Park, proclaimed in 1979, is Australia's largest mainland national park. It covers an area of 19,804 square kilometres and is one third the size of Tasmania. Access to many of the Park's major attractions is seasonal (May/June to October/November). Kakadu National Park is a natural and cultural landscape, access to which has been granted by the Traditional Owners. There are approximately 200,000 visitors annually to the Kakadu National Park.

The tour operations sector of the tourism industry in the Top End of Australia is characterised by the presence of a range of coach, minibus and 4WD tour operators carrying both domestic but predominantly, international visitors, on day and multi-day tours into the National Park. Visitors arrive on extended tours from "down south", arrive in Darwin to start extended tours south, or depart from a Darwin or, less frequently, Jabiru base. Distinctive differences exist between those guides driving coaches and those driving 4WDs.

Formal education and training context

Vocational education and training (VET) is "education and training for work". It is an industry-led system that exists to develop and recognise the competencies or skills of learners. The Australian National Training Authority (ANTA) Agreement brings together Commonwealth, State and Territory governments to provide the policy and regulatory frameworks for the VET system. In the late 1990s, Industry Training Advisory Bodies (ITABs), now more commonly known as Training Advisory Councils (TACs) were established to steer the implementation of the National Training Reform Agenda. Governments implement the National Training Framework (NTF), including Training Packages, Australian Quality Training Framework (AQTF) and the Australian Recognition Framework (ARF), to enable consistency, quality and national recognition of provider services (http://www.anta.gov.au). Tourism Training Australia (TTA) was established in 1982 and is recognised by the ANTA as the national TAC for the Tourism and Hospitality industry. TTA has been responsible for the development of the competencies required of employees in this industry. Tourism Industry National Competency Standards for Tour Guiding have been produced and verified by teams of expert stakeholders from around the country (http://www.tourismtraining.com.au/). Training packages specify the competencies that must result from the provision of learning services, industry requirements for assessment, and the qualifications that result from competence. In industry areas where there are not yet Training Packages, accredited courses are used instead. The Australian Quality Training Framework (AQTF) is a set of nationally agreed standards to ensure the quality of vocational education and training services throughout Australia.

Training Packages specify the combination of competency standards required to achieve a particular qualification. The former National Training Board and now the National Training Framework Committee of the Australian National Training Authority (ANTA) have been responsible for the development of endorsed competency standards, now covering about 80% of Australian industry. The results of a range of studies presented in NCVER (1999) suggest that competency-based training (CBT) is highly valued for its instrumental, job-specific characteristics in Australian enterprises, but that it is less successful in providing training for workforce innovation and does not provide for learning of a non-goal based kind where problems are set as well as solved.

Although tour guides do access Higher Education, it is usually in specialised scientific disciplines such as zoology, botany, geology or environmental science, and less frequently in social science disciplines such as anthropology and history.

McDonnell (2001) identified that most tourist destination regions both license and provide appropriate formal training for tour guides. The major exceptions to this are Australia, New Zealand, Fiji and the USA. However, more recently, Guiding Organisations Australia (GOA) has been created. It is an umbrella organisation of tour guide associations and other stakeholder organisations formed to represent and promote the common interests of over six hundred Australian tour guides. GOA intends to lead the development of comprehensive benchmarks of both minimum acceptable standards and best practices for guiding. The organisation is committed to working with guiding stakeholders to develop a nationally recognised comprehensive certification or accreditation program for Australian tour guides.

Accreditation is seen as a means of enhancing standards and is being driven by the increasing expectations for service by customers and by product distribution intermediaries, who wish to ensure that the product will be safely run whilst considering its responsibility to environment sustainability and a simultaneously increased awareness by industry of sustainable business practices.

Methods

The project on which this paper is based employed qualitative research methods established on a naturalistic perspective of social inquiry. Naturalistic inquiry is an inductive process based on two alternative sets of hypotheses. These are the naturalistic-ecological hypothesis and the qualitative-phenomenological hypothesis. The naturalistic-ecological hypothesis (Owens, 1982) suggests that if research findings are to be generalised to the everyday world then the research must be carried out within these same contexts, whilst the qualitative-phenomenological hypothesis suggests that to understand the human behaviours under investigation, the framework in which they interpret their environment must be understood, that is, their thoughts, feelings, values, perceptions and actions (Tropical Savannas CRC, 2000).

This collaborative project involved the undertaking of semi-structured interviews with fifteen tour guides from nine different tour operations businesses, in a location of their choice. All guides interviewed had at least twelve months experience conducting tours in and/or within Kakadu National Park. These locations ranged from ‘the depot’, to a local coffee shop, to their own homes. Each guide was prompted, through a series of open-ended questions, to talk about particular aspects of their life as a tour guide. Examples of these questions included:

- background information – reason for being a tour operator/guide, issues in the business, attitude to the job;
- training and education – previous education, courses attended, preferred delivery mode, preferred training, how they would devise a training package, what elements would make-up such training;
- workplace learning – what skills they have picked up while doing the job, how they have gained specific information regarding their role, who has helped them to learn in the workplace, what sort of information they seek, etc.

Interviews (which were typically 45–60 mins long), were tape-recorded and transcribed verbatim. Transcriptions of the interviews were returned to the participants for comment. Quotations contained within the transcripts were manually 'catagorised' to allow for comparisons to be made between interviews and to build our own story, based on their words, of how tour guides perceive learning, education and training. It needs to be stated that the results of the study are specific to the context of the study. There are, however, resonances with many of the points made and current thinking in terms of workplace learning.

Results

There was a range of results that emerged from the study. While not all of these will be discussed in detail a number of them are outlined below. In general, it was apparent that there was a shared community of practice that supported and directed the work and learning of the tour guides in the study. Elements of this community of practice included the perceptions held by the tour guides, the information accessing strategies and sources they used, and the informal learning processes they managed.

Perceptions of learning and training

The perceptions of learning and training held by the tour guides in this study have to a large degree evolved from their workplace experiences. There was a strong perception that they were constantly learning, that because each tour was idiosyncratic, different knowledge may be needed or different aspects of the geography, flora or fauna would become evident, leading to new learning. Another important element of their views on learning and their role, again emerging from their perceived isolation and their need to be independent, concerned their need to pre-plan and consider a range of possible scenarios in preparation for each tour. This preparation took into account both the physical tools/equipment required and the knowledge requirements for the tour.

The study participants also held a range of perceptions regarding formal education and training. For example:

- While formal training was seen as a good thing it was at the same time perceived as unavailable to them due to their unique workplace and heavy workload throughout the tourist season; not readily available in the short time gaps the guides had between trips; and unavailable due to it not being in a usable format (that is, external).
- The tour guides interviewed clearly perceived they needed to attend seminars and training sessions not only to increase their general knowledge but to keep up-to-date with specific skills such as remote area operations, risk management and remote area first aid.

- In general, the tour guides in this study had a confused understanding of the differences between accredited and non-accredited courses.
- There was the perception that further education and training may be a requirement with the impending move towards accreditation for guides or companies that employ guides.
- There was a preference for face-to-face education/training rather than the option of external study, although this was not ruled out.
- There is the perception that guides do challenge the information they are either provided with or find out for themselves. This process usually involves speaking with other drivers and checking their interpretation of the information and their intended use of it.

Information sources

Accessing information is an important part of the learning and knowledge acquisition of tour guides. It should be noted here that any real division between seeking and gathering information, learning and knowledge development is, at best, problematic. Tour guides are continually learning and making decisions about what information to access, which information is pertinent to their contexts, whether they will trial that information, and the like. Information can be accessed or transferred to individuals in a number of forms; from printed literature to newer methods that utilise technology, including computer, internet, faxes, and email. The primary sources of information used and identified by the tour guides interviewed are – books and other literature; libraries; papers and magazines; videos and compact discs; computers/internet; and their clients/passengers.

There was a range of information-sourcing characteristics that emerged from the study. These characteristics are to a large degree formed by the nature of the work that tour guides are undertaking. They include:

- the frequent need for up-to-date information, whether that be in response to passenger enquiries or to understanding local road conditions;
- information or the testing of knowledge tends to be done opportunistically;
- there are limited information or knowledge bearing sources available in the workplace itself (particularly while on tour);
- information and knowledge requirements tend to be idiosyncratic and chaotic (and thus not easily systematised);
- several of the information and learning sources used *can* have the negative impact of passing on inadequate or inappropriate information;
- the timeliness and timing of information can affect (both in positive and negative terms) learning outcomes.

Informal learning

The learning approaches utilised by the tour guides interviewed in the study formed around what might be described as general informal learning processes as directed by their work environments.

Within this approach to learning we can identify a number of characteristics. For example, the tour guide is more likely to be open to the information seeking and learning experience if a person with perceived expertise or experience is the source.

This approach is often opportunistic with the guide observing or noticing an event or action that gained their attention. As such, the opportunity for learning is also idiosyncratic in that the tour guide concerned must be receptive to the learning opportunity. Finally, the observed actions require trialling in practice before they become a part of the tour guide's accumulated knowledge and practice.

In general the study found that informal learning:

- is often opportunistic;
- is frequently ad hoc;
- is idiosyncratic in that the tour guide concerned must be receptive to the learning opportunity;
- is dependent on time and timing issues;
- time taken to learn and make changes is fluid and is open to demands on the person concerned and the context in which they work;
- timing of when information access takes place, or action is taken, depends on a range of factors within the individual's context (such as workload, acts of serendipity, opportunity to access information/advice, or the priority of the project);
- occurs around issues of relevance and need;
- relies to a large degree on the establishment and use of relationships;
- only becomes a part of the tour guides accumulated knowledge and practice when it has been trialled and seen to "work".

It can also be extrapolated that:

- Control over learning generally remains in the hands of the learner.
- Information sources need to be relevant, timely, accessible, personalised and succinct.
- Elements of learning, such as developing ideas, gaining information, and gathering examples from practice and trialling, can be occurring concurrently.
- Informal learning as an individual process, with highly individualised actions, operates in the domain of commonsense knowledge which is rarely challenged or reflected upon by the individual.
- Informal learning episodes, as an individual process, are open to such vagaries as whether they are followed through, whether appropriate information is gathered, and whether adequate decisions are made.

Discussion

The above findings suggest a range of information gathering and learning characteristics that are apparent for the tour guides in our study. It can be said that these characteristics are informed by the local setting and are both informed by and help form the perceptions held by the tour guides. This tour guide "community of practice" is the milieu in which service agencies or educators engage when providing education and training activities. It is a community of practice that has implications for and highlights a number of issues regarding formal education and training activities.

In summary, informal learning for tour guides is characterised as being opportunistic, idiosyncratic, dependent on time and timing issues, mostly occurring around issues of immediate need and relevance. This learning characteristically occurs with people they have or are forming a relationship with or those perceived as experts. It also includes an element of trialling or use in practice before being incorporated as knowledge.. Keeping these points in mind it is pertinent to discuss their impact on aspects of formal education and training.

Formal education and training activities, on the other hand, are generally perceived to be established by those with knowledge of the subject, but not necessarily known by the learner. Further, these activities are carried out in a "classroom" situation away from the learner's context, often with concepts and examples established outside that context, and are frequently taught impersonally, over distance and with set or established timing and events. We can add to this by saying that formal education and training has traditionally been "top down" – a process that fails to address local needs, despite the 'industry consultation' process that is undertaken during competency and qualification identification and development (Billett 2000). If we select a single aspect of formal education and training – that of delivery – the circumstances posed by the different approach become apparent.

Delivery

If the results of the study were assumed to be applicable system wide there would be a number of ramifications for formal education and training providers, as the following points attest. For example, while most guides in the study felt that face-to-face training would be their preferred delivery option, this position was not couched in terms of formal classroom settings. Tour guides have quite clearly stated that in more formal learning situations theory and practical applications need to be mixed. Appropriate flexible delivery strategies would need to consider what can or cannot be learnt and assessed on-the-job. What can be achieved on- the-job does not need to be delivered in a "classroom". Timing of courses was also considered to be a constraint, although it was generally accepted that any formal training would have to take place in the off-season, between November and April, with guides articulating a preference for short intensive sessions.

As such, a range of professional development workshops could be created and delivered in the "low" season by a number of perceived experts. These could include their peers, authors, and scientists, supporting learning on guide-identified skills and knowledge sets. Where possible and appropriate, the content of these workshops could be linked to national tour guide competencies, effectively building them into a program of formal education and training. A range of assessment opportunities could be promoted for those guides who were interested in participating.

However, the complexities of tour guide workplaces and their current ways of learning, does not easily allow for a "one-size-fits-all" solution. Ideally, training would need to be tailored to meet the requirements of individual or small groups of guides. As they perceive their workplaces to be the "best" places to learn, workplaces could form the basis from which examples and case studies are built (a view supported by many authors including Billett 2001, Wyse and Associates 2001, and Kearns 2002). In this way, formal education and training can be relevant, set in practice and thus legitimised. What would be important for training providers is the ability to deliver this highly individual and contextualised training at an appropriate cost, to both the institution and the individual.

There would be additional implications for the staff delivering the training as they would need to be seen as "expert" in their fields, or using someone who was respected by the tour guides. Guides who are perceived as "experts" would need to recognise the role they could play in sharing their knowledge and skills. Workplaces would then be required to recognise the additional roles that their "experts" are performing and provide support for their development. Billett (1993), Kearns (2002) and many other authors confirm the importance of maximising the potential of these informal learning strategies and those in key positions to influence them.

Building relationships with workplace based "expert" trainers both within and between businesses will assist in the overall promotion and recognition of education and training, both informal and formal. This is also likely to contribute to the development of new networks, new communities of practice, new learning cultures and an overall increase in the professionalism of this sector of the tourism industry. Wyse and Associates (2001) highlighted the importance of these relationships in their study of flexible delivery across a range of Australian workplaces.

Given that the vast majority of guides still learn to do their job in the workplace, RPL can usefully formalise that which has previously been learnt informally. Appropriate construction and application of well-designed RPL assessment "kits", combined with workplace or simulated workplace assessment could uncover both explicit and tacit knowledge. The assessment process can begin off-season with skills and knowledge validated, where necessary, on-the-job once the season starts. These RPL 'kits' need to be designed not only for individuals, but also for workplaces, in order to ease the undertaking, management and hence cost of this process.

Conclusions and Implications

In today's competitive international marketplace, the Australian tourism industry is under pressure from increasingly sophisticated and discerning tourists, and risk adverse product intermediaries, to both improve its professionalism and maintain and enhance its unique natural and cultural environments. Consumer protection legislation is becoming increasingly stringent and people all over the world are demanding higher standards from tourism service providers. It is therefore vital to the sustainability of tourism in the Northern Territory to lift industry standards through training and accreditation.

It has been suggested that tour guides can contribute to this need for professionalism through accreditation, certification, licensing and formal education and training. This professionalism for Australian tour guides is primarily perceived to be achievable through formal education and training and Recognition of Prior Learning. However, the study described in this paper demonstrated that the majority of tour guide learning is in fact informal, taking place within the workplace. If we recognise the importance of situating formal education and training and Recognition of Prior Learning within their community of practice, then there is, arguably, more likelihood of a better uptake of such into their work environment.

Possible directions for the delivery of formal education and training were raised in our discussion, and although these have a range of resource implications, they do provide opportunities for engagement with the predominant informal learning approaches of tour guides.

As this paper has concentrated on tour guide learning and the implications of such for formal education and training, a word of caution is necessary. Although identified in the study, a range of industry-specific contextual elements impacting on informal learning has not been articulated in this paper. Issues such as a lack of an appropriate industrial award covering tour guides, lack of incentive to improve guiding skills, low levels of investment in employees, high levels of staff turnover, and increasing casualisation and sub-contracting all indicate that a “sea-change” is required to improve the perceived value of the profession of tour guiding. These issues demonstrate that it is not a simple system response that may be required to realise the desired increase in tour guide professionalism, but a whole industry response – a response that incorporates the views of all those with an interest in both accurately identifying and raising the standards of tour guiding to meet emerging needs.

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Chapter 7

The Learning Style Preferences of International Students Studying Hospitality and Tourism Management in Australia

A Focus on Confucian Heritage Culture Students

By Paul Barron

Abstract

International student enrolment at Australian higher education institutions has grown significantly over the past decade. Traditionally, many international students studying for an Australian qualification originate from Asia and a majority of these students are of Chinese nationality or ethnicity. Whilst there is a growing body of literature that explores learning issues of Asian students involved in Australian higher education, there are examples in the literature that promote stereotypical views of the strengths and weaknesses of such students. This paper reports on significant research into the learning style preferences of international students studying hospitality and tourism management in Australia. Specifically, this paper examines the preferred learning style of 500 international students. Of this group, those students who are of a Confucian Heritage Culture are identified and separated. This paper compares the preferred learning style of such students with other international students and suggests that preferred learning styles should be taken into consideration when developing and presenting curriculum which is accessed by international students.

Introduction

International student enrolment at Australian higher education institutions has grown significantly over the past decade and Australia now ranks third behind the United States and the United Kingdom as the destination of choice for international students (IDP Education Australia, 2000). As a consequence, the number of international students studying Australian programs has more than doubled, from 46,600 to 108,600 students in the period 1992 to 2000 (Maslen, 1999; IDP Education Australia, 2000). This figure continues to rise, with some 114,600 international students studying for Australian qualifications in session 2002 and almost 124,000 student visa applications for session 2003 (IDP Education Australia, 2002).

The significance of this increase is further reinforced as international students, when expressed as a proportion of the total number of students enrolled in Australian universities, rose from 5.5% in 1991 to 9.6% in 1997. During the past decade therefore, it may be suggested that universities in Australia experienced an internationalisation of their activity; both in terms of the number of international students studying Australian higher education programs, and an increase in the density of international students. Almost one in ten of the total enrolment originated overseas.

Future demand for Australian education by international students appears strong. The IDP forecast that by 2025, one million international students will be studying for Australian qualifications – the majority of whom will originate from China (IDP, 2002).

Traditionally, the majority of international students that study for an Australian qualification originate from Asia. Dobson, Sharma and Calderon (1998:10) state that, ‘in 1997, the vast majority of international students came from Asia (over 85% of the total) – the top ten countries of origin are all in Asia. Specifically, the South East Asian (SEA) countries of Malaysia, Singapore, Hong Kong and Indonesia contributed 68% of the total overseas student enrolment.’ This trend continued into first semester 2000 with a similar majority of international students originating from countries in Asia. Australia’s reliance on several South East Asian countries is emphasised by the fact that 52,500 international students (almost half the total) came from Singapore, Malaysia or Hong Kong. A further 33,000 international students originated from Indonesia, China, India, Thailand, Japan, Taiwan, South Korea or Vietnam (Davis, Olsen and Bohm, 2000). Therefore it can be seen that, in semester one 2000, 79% of all international students studying Australian programs originated from Asia, the majority of those from the traditional South East Asian countries. It has been found that a majority of these students are of Chinese origin. Hereafter, they will be referred to as Confucian Heritage Culture (CHC) students (Lee, 1999).

CHC students studying at university in Australia are more likely than domestic students to successfully complete the academic aspect of their program and, indeed, often outperform their Western counterparts (Burns, 1991; Dobson, et al, 1998). However, successful completion of a program does not necessarily mean the student had an enjoyable or satisfying educational experience (Meggitt, Tourkey and Singh, 1995). This better performance could be financially motivated (Dobson et al 1998; Burns, 1991) or indicate an element of self-selection (Salili, 1999). It is also suggested that cultural values may influence the achievement orientation of the Asian student, noting that the Asian concept of success is focussed, amongst other aspects, on academic achievement (Chan, 1999). In general CHC students have been taught to work hard and great emphasis is placed on their learning and education as a means to success and building character. Thus CHC students are socialised to value hard work and excellence in education. In addition, the academic success of a child is an important source of pride for the entire family and, equally, academic failure is a stigma borne by all associated parties. Therefore, driven by a combination of financial implications, a sense of duty toward parents and perhaps influenced by cultural values which emphasise hard work and endurance, CHC students take more personal responsibility than their Western counterparts for their success or failure (Chan, 1999; Salili 1999).

Cultural Orientation and Learning Stereotypes

Generalisations about cultural orientation are rarely accurate in terms of the individual or in terms of subgroups within that culture, but there are abundant examples in the cross cultural educational literature which promote stereotypical views of the strengths and weaknesses of international students. Viewed positively, CHC students studying overseas are considered to be high achievers, diligent note takers, well disciplined, hard working, quiet, respectful of lecturing staff and good attendees (Barron 2002; Volet and Renshaw, 1999; Burns, 1991; Bradley and Bradley, 1984). Similarly, Cortazzi and Jin (1996) found that Western teachers of English working in Chinese universities considered their students to be persistent, thorough, friendly, keen to learn and good at memorising.

This positive view is, however, tempered by a more negative perspective of CHC students, who, in addition to possessing predictable problems associated with dislocation, culture shock and loneliness, also possess unexpected, or unpredictable, problems affecting their learning which have to be contended with by both the student and academic staff at the Western university. This view continues to remain widespread among Australian academic staff (Volet and Renshaw 1999).

The main criticism that is focussed towards CHC students is a perceived propensity to rote learn (Samuelowicz, 1987; Kember and Gow, 1990) leading to a surface approach as opposed to a deep approach to learning. Thus it is assumed that the CHC student does not attempt to understand the material but merely commits it to memory in order to access it at some later time (Marton and Saljo, 1976). Further criticisms include viewing the teacher and/or text as the definitive source of knowledge and lacking in self-management skills. This can result in an expectation and/or requirement of identifying specific reading for a subject (Burns, 1991; Ballard and Clanchy, 1994; Samuelowicz, 1987), being passive, quiet and non-participative in class (Kember and Gow, 1990; Ballard and Clanchy, 1991; Ramsay et al, 1999), unable to reference correctly and often being guilty of plagiarism (Watson, 1999); unaware of, and not skilled in, assessment methods that are used commonly in Western universities (Heikinheimo and Shute, 1986), and possessing inadequate English Language proficiency (Samuelowicz, 1987; Ballard and Clanchy, 1991; Burns, 1991; Mullins, Quintrell and Hancock, 1995; Yanhong Li and Kaye, 1998). Researchers however, are increasingly challenging such stereotypes (see for example, Kember & Gow, 1991) and delving deeper into the cultural idiosyncrasies which manifest themselves as differences in teaching and learning approaches.

Different Types of Learning Styles

Kolb (1984) identified individuals' learning styles by means of the Learning Styles Inventory, which identified four stages of learning that require specific learning abilities. Based on Kolb's theories, Honey and Mumford (1986) developed the Learning Styles Questionnaire and suggested four basic learning styles: Activist, Reflector, Theorist and Pragmatist. Activists like to involve themselves in new practices and enjoy tackling problems by brainstorming. They appear to be easily bored and prefer to move from one task to the next as the excitement fades. Reflectors are more cautious and thoughtful and prefer to consider all possible avenues of action before making any decisions. As the name would suggest, any actions they take are based on observation and reflection. Theorists like to integrate their observations into logical models based on analysis and objectivity. They appear to enjoy the structure associated with sound theoretical frameworks. Pragmatists are practical, hands on people who like to apply new ideas immediately. They often get impatient with an over emphasis on reflection. While it is recognised that the Learning Styles Inventory and the subsequent Learning Styles Questionnaire have been developed in Western society and historically administered to Western participants, this means of measuring the learning style preferences of, mainly Chinese, students has been used to great success in a variety of Confucian culture settings (see for example, Wong Pine and

Tsang (2000) in Hong Kong, Singapore and Taiwan). Thus it is envisaged that the use of this Western tool will not unduly influence the results of this study.

There is little research concerning CHC students studying Hospitality, Tourism and Leisure Management at university level in Australia. As disciplines, however, Hospitality, Tourism and Leisure Management appear attractive to CHC students and draw a higher than average number of such students (Malfroy and Daruwalla, 2000; Khwaja and Bosselman, 1990). This perhaps is due to the notion that a career in the hospitality and tourism industry is no longer seen as demeaning (Zhao, 1991), coupled with the rapid growth of the hotel and tourism industry in, for example, mainland China (Huyton, 1997). Therefore, while precise numbers are difficult to locate, it has been suggested that, within these disciplines, the undergraduate student population is becoming more diverse (Hsu, 1996). A consequence of this diversity is that the cultural differences which can manifest themselves in different cognitive and linguistic patterns, often constitute formidable barriers that initially may prevent successful participation in Western classrooms (Beaven, Calderisi, & Tantral, 1998). Western tertiary institutions are consequently confronted with the task of managing this diversity, ensuring not only a measure of quality in CHC students' learning but also for domestic students who share the same classrooms.

Learning Style Preferences of Hospitality and Tourism Students

Several studies have recently been undertaken that attempt to identify the learning preferences of Hospitality, Tourism and Travel Management students in the UK and Asia.

Firstly, studies undertaken in the UK would suggest that the vast majority of students who are attracted into hospitality management programs have preferred learning styles which suggest that they enjoy practical activity, but who are less comfortable with theorising and reflection. As such, these students display preferences for Activist learning styles (Lashley, 1999). Indeed, it would appear that these students thrived on the challenges associated with new experiences and they were described as tending to "act first and consider the consequences later" (Lashley, 1999:181). Not surprisingly, students with Activist learning style preferences learn most easily from activities involving group work that is exciting, challenging and quick to change. On the other hand, Activists find it more difficult to learn when they have to take a passive role, not become involved or undertake solitary work. They are not keen on practising and do not enjoy the constraints of having to follow precise instructions (Honey and Mumford, 2000). Indeed, such was the propensity for these students to adopt Activist learning styles, that a strategy had to be designed and implemented in order to develop students studying Hospitality and Tourism programs in the host universities into more reflective practitioners.

However, it would appear that domestic students studying Hospitality Management, Hotel and Catering Management, Tourism Management and Travel and Tourism Studies at Higher Diploma level and above in various colleges and universities in Hong Kong, Singapore and Taiwan already display preferences for Reflector learning styles (Wong, Pine and Tsang, 2000). It was found that all but one of the student groups questioned displayed a strong preference for the Reflector learning style. As such, these students prefer to learn through observation and benefit from the opportunity to think before acting. They appreciate the opportunity to undertake research before an activity and think about what they have learned.

Reflectors find it more difficult to learn from activities where they are forced into the limelight, for example through peer presentations or role playing. Similarly, methods of learning such as case studies may prove problematic for these students, as they are not keen on undertaking a task without prior notice or sufficient information (Honey and Mumford, 2000).

It may be argued that the approach to both research projects identified above were similar in nature. Essentially, both groups of students were studying similar programs in their home country and both groups completed the same questionnaire using similar data collection techniques. It is contended that a factor that could have influenced the difference in results may be the differing cultural approaches to education.

This research aims to analyse the preferred learning style of international students studying hospitality and/or tourism programs in Australia. Specifically, this research will:

1. identify the nationality and ethnic origin of a sample of international students enrolled in Australian programs and determine their individual preferred learning style;
2. group all Confucian Heritage Culture students and determine the collective preferred learning style;
3. compare the learning style preferences of the CHC students to other international students in this sample;
4. present recommendations concerning identified preferred learning styles that may be taken into consideration by Western academic staff relating to teaching methods.

Methodology and Data Collection Methods

This paper represents a portion of a larger study which the researcher approached from a postpositivist perspective. Postpositivism operates under an ontology of critical realism which assumes an objective reality, but recognises that it is imperfect (Dias and Hassard, 2001). Thus, the postpositivist researcher uses a variety of both qualitative and quantitative methods to achieve a more accurate indication of what is happening in reality (Phillips and Burbules, 2000). The postpositivist then uses triangulation in order to examine the same variable as a means of increasing accuracy (Neuman, 1997). From a practical viewpoint, it is held that the postpositivist conducts research in a well controlled environment, such as the classroom or within the framework of a focus group (Fischer, 1998) and thus uses more natural and comfortable settings (Dias and Hassard, 2001). Sparks (2002) considered that the postpositivist researcher conducts both individual and group research but solicits the emic, or insider, viewpoint. Consequently, the postpositive researcher aims to produce recommendations that assist in the general improvement of an issue rather than develop definitive results.

A purposive method of selection was used to determine the higher education providers that were to be used in this study. The institutions chosen presented a good combination of publicly funded and private institutions; a good geographical spread of institutions that cover most Australian states and territories; a selection of foundation, post WWII and upgraded College of Advanced Education institutions; and recognition of the maturity of Hospitality and Tourism education provision by a number of institutions.

A variation of the Learning Styles Questionnaire designed by Honey and Mumford (2000) was used in this study to investigate the learning styles of international students studying in Australia. While it is recognised that there are at least 32 available instruments being used by researchers and educators to assess the different dimensions of learning styles (Campbell, 1991), the LSQ was chosen as it fell into the category identified by Curry (1987) as an instrument that specifically measured students preferred learning styles. In addition, the choice of the LSQ was deemed most appropriate when Hickox (1995) criteria for suitability was applied, namely; that the number of respondents was in excess of 30; that the instrument had been revised and updated since its origination; and, finally, that this particular instrument has been used on the target group.

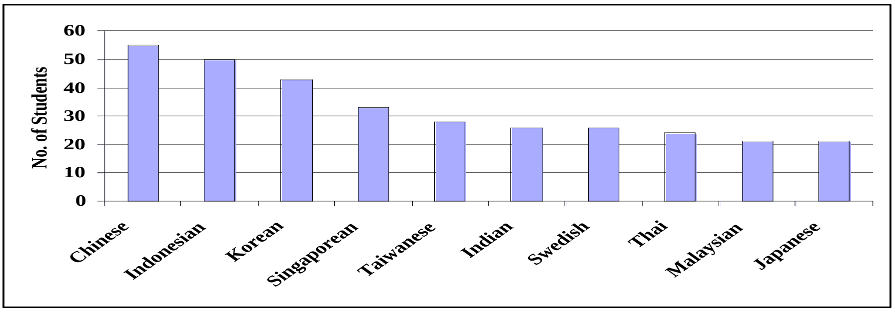
The questionnaire was divided into two parts. The first section asked respondents to answer questions concerning age, gender, nationality, ethnicity and number of dependents. This section also asked questions that attempted to determine motivations for current area of study and reasons for choosing the particular institution. The second section consisted of 80 questions relating to the four different types of learning styles as identified by Honey and Mumford (1986), namely Activists, Reflectors, Theorists and Pragmatists. This section comprised 20 questions which are designed to examine each of the four learning styles. Respondents were asked to identify on a six point scale (0 = Strongly Disagree; 1 = Disagree; 2 = Disagree on Balance; 3 = Agree on Balance; 4 = Agree; 5 = Strongly Agree) their strength of feeling for each statement. This means of response differs from the original Honey and Mumford (2000) method of responding which involved respondents merely placing a tick to indicate if they agreed with a statement, or a cross to indicate that they disagreed with a statement. This means of response has been tested in a variety of research projects over a number of years (see for example Lashley, 1999; Lashley & Shaw, 2002; Barron, 2002; Barron and Arcodia, 2002), and it has been found that the employment of a scale adds to the sophistication of the responses as it allows respondents to present a more accurate measure of their feelings concerning each question (Lashley and Shaw, 2002).

In order to achieve a maximum response, and to answer questions students may have had during the completion of the questionnaire, the questionnaire was administered in the controlled environment of formal class time and under the supervision of the author. Ticehurst and Veal (1999:138) describe this approach to a questionnaire survey as a “captive group survey” and suggest that this method of questionnaire administration is expeditious and less problematic than in less controlled situations.

The data collected from the second part of the questionnaire, which contained 80 questions on learning styles, were analysed by the score mean of each type of learning style. Due to the use of the Likert Scale an indication of likes and dislikes relating to learning styles was determined for each person. The data were processed and analysed via SPSS version 10.

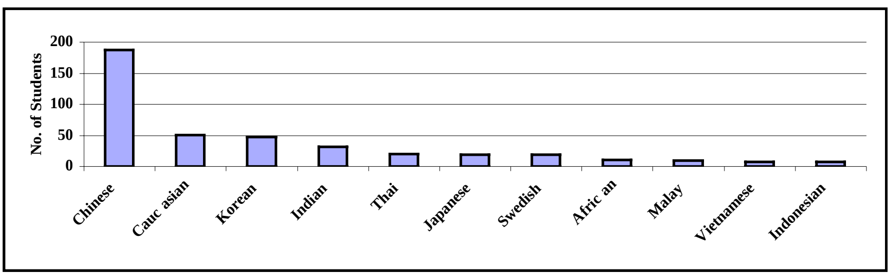
Results and Discussion

A total of 514 completed questionnaires were collected from international students studying hospitality and/or tourism management in Australia. Data from the first section of the LSQ determined that the average age of the sample was 22, 63% of whom were female, almost all (98%) were single with no dependents, and of the total, 30% were in their first year, 45% in second, 22% in third year and the remaining 3% of respondents were studying at postgraduate level. When analysed, the 514 completed questionnaires yielded a total of 54 different nationalities. The number of nationalities represented does, however, need to be placed in context. Closer analysis of the stated nationalities suggested that only several nationalities represented the majority of respondents. Indeed, it was found that the majority (40) of nationalities had fewer than 10 respondents, and 31 nationalities had fewer than five respondents. Graph 1 below details the nationalities that represented 20 or more respondents.



Graph 1
Main nationalities of respondents.

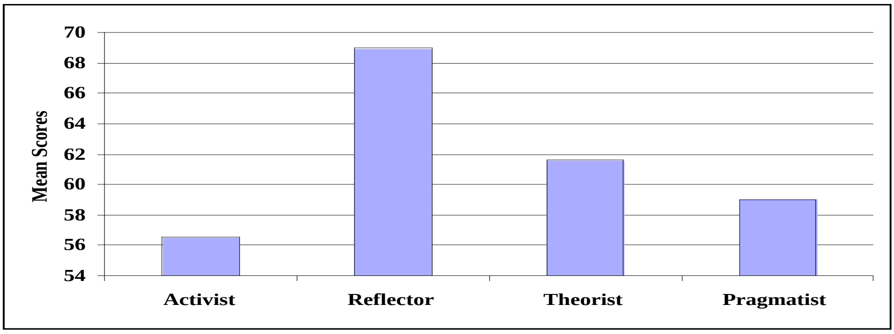
Graph 2 below gives an indication of the main ethnicities as indicated by the entire group of respondents. As can be seen, those of Chinese ethnicity make up the largest group. The numbers of each of the main ethnicities represented by this group of students are more clearly shown in Graph 2 below.



Graph 2
Main ethnicities of respondents.

This study is firmly focused on those students of Chinese nationality or ethnicity that have been referred to throughout this paper as CHC student. The total number of Confucian Heritage Culture Students that were identified in this sample comprised the sum of Chinese (187), Korean (47), Japanese (19) and Vietnamese (7) students. This gave a total sample size of 260 CHC students. Graph 3 below gives an indication of the Learning Style Preferences of this group of CHC students. It can be seen that this cohort displayed a clear preference for a Reflector learning style. In addition, it can also be seen that this group demonstrated an element of preference for adopting a Theorist learning style and an indication for adopting a slight preference for

Pragmatist learning style. It is clear, however, that this group of CHC students' least preferred learning style method is Activist.

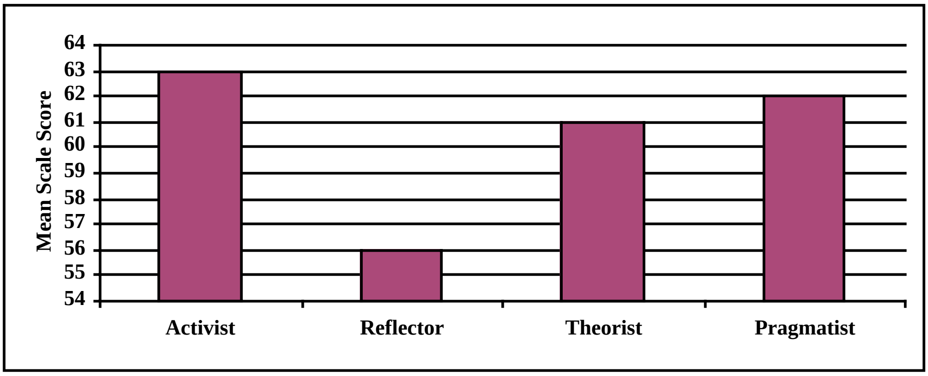


Graph 3
Mean scores for CHC students' learning style preferences.

From a practical perspective this means that this group of CHC students learn best from activities where they are allowed to watch, or think about, or mull over an activity and stand back from events and listen and observe. This group of students would appreciate being given the opportunity to think and prepare before acting and have the opportunity to evaluate what has happened. They would enjoy becoming involved in work where it involves conducting some detailed research at their own pace.

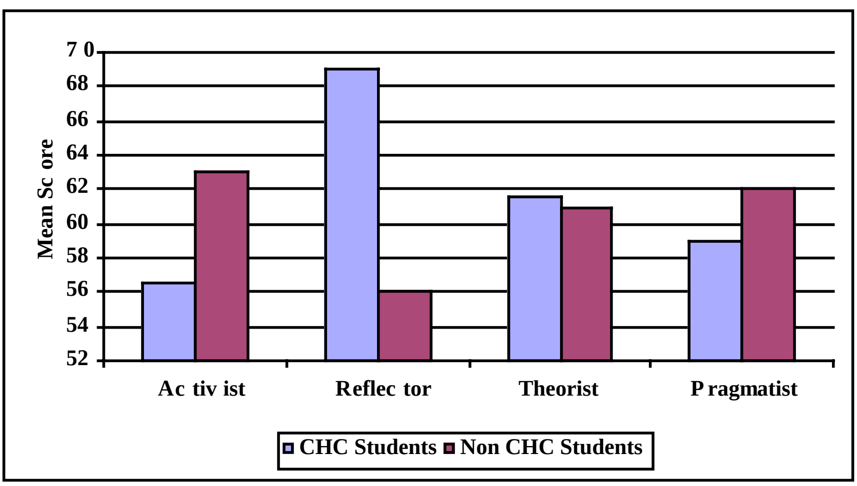
This group of students may react against activities where they are forced into the limelight (e.g. as a leader or during role play) or where they are involved in situations where they are required to do something without warning and which require action without planning. Importantly, this group of students would learn least from situations where they are given insufficient data on which to base a conclusion or where they are given immovable instructions as to how to complete a task. In addition, they are not keen on taking short cuts and are worried by time pressures. Therefore, it may be suggested that this group of students prefer to take a more passive role when learning. They may not learn well in a classroom situation where they become the centre of attention, for example during a student led presentation.

While the focus of this research concentrates on the learning style preferences of students who share a common Confucian culture it is of interest to the researcher to identify the learning style preferences of students who make up the non-target group. As previously mentioned, this group comprises those respondents who did not identify themselves as being of Chinese, Japanese, Korean or Vietnamese nationality, or whose ethnic origin was other than Chinese. This group comprised 254 respondents – almost 50% of the total sample. Graph 4 below presents an overview of the learning style preferences of the non-target group of students. It can be seen that in contrast to the target group of students, this group of students expressed a preference for the Activist learning style with slightly less preference for Pragmatist and Theorist learning styles. The least preferred method of learning style was Reflector.



Graph 4
Mean scores for non CHC student's learning style preferences.

It is recognised that certain elements of the learning style preferences of the target and non-target groups are reasonably similar, for example Theorist and Pragmatist mean scores. However a clearer picture of the strength of preference and differences between preferences emerges when a comparison of the results from the target group and non-target group are made. Graph 5 below identifies the differences in learning style preferences of the two groups. It can be seen that both groups achieved very similar scores for Theorist learning style and reasonably similar scores for the Pragmatist learning style preferences. It is however, clear that differences exist between these two groups. The CHC students indicated a clear preference for Reflector learning styles and results from this survey would suggest that adopting an Activist learning style is their least preferred learning approach. It is also clear from the graph below that the other international students in the sample preferred learning styles that were exactly the opposite from their CHC peers. They demonstrated a preference for Activist learning styles and were least comfortable when adopting a Reflective learning approach.



Graph 5
Mean learning style preference score comparison.

Conclusion

International student enrolment is changing the student profile of Australian universities and has resulted in increasing pressure for institutions to develop effective frameworks to manage student diversity and provide appropriate support for international students. A key segment of international enrolment in Australian universities is Confucian Heritage Culture students. This paper recognises and challenges some of the positive and negative stereotypical views found in the literature by using the Learning Styles Questionnaire with a group of international students at The University of Queensland.

This study found that when CHC students study Hospitality and Tourism management at university in their home countries they display preferences for reflector learning styles. When Western students study similar programs in Western universities, they show a preference for activist learning styles. The results of this study would suggest that when CHC students study hospitality and tourism management at a Western university, they bring with them their preference for a reflector learning style which is in contrast to identified learning style preferences of other international students and domestic students alike. It may be suggested that this difference in learning style preferences represents a significant issue which challenges current models of effective teaching in hospitality and tourism management programs in Western universities and has implications for teaching methods, curricula design and assessment strategies.

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Part 3

Marketing and Consumer Behaviour

Chapter 8

An Investigation of Changes in Well-being in Relation To Holiday Taking

By David Gilbert, Outi Niininen and Junaida Abdullah

Abstract

This study was planned to ascertain whether the activity of holiday taking has any impact on the life satisfaction or subjective well-being of holidaymakers. The results indicated that holiday taking activity changed the sense of well-being of holidaymakers. A comparison between a holiday taking group and non-holiday taking control group provided evidence that the holiday taking group experienced a higher sense of well-being prior and post their holiday travels when compared to the non-holiday taking group. Whilst the effect sizes are mostly small, the evidence suggests that holiday taking has the potential to enhance the sense of well-being of the holidaymaker.

Introduction

Tourism can be likened to an escape from the alienation of modernity. As this alienation becomes increasingly unbearable people turn to tourism. Therefore, it is not surprising to find the tourism industry operating on the premise that holiday travel is good for everyone and everyone should have a holiday. This can be seen in the way that the tourism industry offers a variety of holidays as 'escape-aids, problem-solvers, suppliers of strength, energy, new lifeblood and happiness' (Krippendorf, 1987:17). This is supported by Hobson and Dietrich's observation that there is an 'underlying assumption in our society that tourism is a mentally and physically healthy pursuit to follow in our leisure time' (1994:23), and hence a factor in increasing quality-of-life (QOL). A study commissioned by the English Tourism Council regarding the health benefits of holiday taking, found that the general public is more inclined to regard holidays as a rest and break from routine, and less likely to think of holidays as a way to improve quality-of-life. Leisure is also viewed as a separate sphere of social life and it is rarely investigated in the QOL context. Hence the lack of research into the relationship between vacations and QOL has also been acknowledged in the literature (Richards, 1999).

General Practitioners, however, are more aware of the many feel-good benefits of having a holiday (Voysey, 2000), (for example, psychological stress is thought to be a contributing risk factor towards a variety of diseases, e.g. coronary heart disease, CHT). Myrtek, Fichtler, Strittmatter and Brugner (1999:349) argue that 'working life is estimated by most people to be more strenuous and less pleasant than leisure activities'. Conversely tourism can be an effective way to relieve stress for some people as physical activity together with individual cognitions and feelings towards natural environment can help reduce anxiety and depression (Milligan, Gatrell and

Bingley, in press). Yet, it is important to note that leisure time can be perceived as more *emotionally* strenuous than working time, but this emotional stress is not a contributing factor towards the development of CHT (Myrtek et al, 1999).

However, the question as to whether holiday taking or holiday travel does make one happier to the extent that it satisfies one's psychological needs, has yet to be fully examined. So far, there has been a major study by Neal, Sirgy and Uysal (1999), which attempted to develop a measure of satisfaction with tourism services that is related to life satisfaction. In addition, life satisfaction in tourism has been addressed by Allen and Donnelly (1985); Allen et al (1988); Andrews and Withey (1976), and Sirgy and Su (2000). Not all attempts have been methodologically sound.

One study purports to 'explore the impact of travel and tourism experience on travellers' psychological well-being or level of happiness' (Milan, 1996:166). However, the finding is limited to the state of well-being of senior travellers while on an escorted tour holiday. The state of well-being was studied at the start of the tour and compared to the result measured at the end of the tour. As the data were collected at the start and not prior to the tour it is not surprising that the study failed to uncover any significant change in the sense of well-being. Furthermore, leisure satisfaction in the form of vacation travel is likely to be determined by the satisfaction with the travel services as well as the satisfaction gained from vacation reflections (e.g. the perceived freedom from control/work, and increased possibility for arousal, involvement, mastery and spontaneity during the holiday) (Neal et al, 1999).

There is evidence in different leisure studies that indicate positive leisure experiences can induce positive moods (Hills and Argyle, 1998; Argyle and Crossland, 1987; Mannell, 1980), which enhances the participants' sense of well-being. It is believed that when an individual experiences leisure, some psychological needs will be satisfied (Tinsley, 1979). In this respect, leisure satisfaction has been recognized as an important contributor to life satisfaction (Andrews and Withey, 1976) and consequently a lack of leisure could result in a decline in one's quality-of-life (Neulinger, 1981; 1982). Leisure offers relaxation and also plays an important role as a buffer between stress and well-being. Wheeler and Frank (1988) identified twenty-two potential buffers and found four of them to be "true" buffers between stress and well-being: a sense of competence, nature and extent of exercise, sense of purpose and leisure activity. Therefore, it is considered appropriate to examine the phenomenon of holiday taking as a leisure activity and experience. As pointed out by Marsh and Henshall (1987:47), holiday taking is essentially about the 'purchase of an experience, which could be an emotional, intellectual, spiritual or physical experience'.

Recent leisure expenditure statistics have reported a shift from spending on tangible goods towards experiences and services: 'leisure time in general, and vacation time in particular, are increasingly being recognized as one of the experiences that people value in terms of QOL' (Richards, 1999:190). Furthermore, the trend from "passive" to "active" holidays associated with special interests should also be acknowledged and it is considered relevant for this study as "mastery", involvement and arousal enhance intrinsic satisfaction (Bowen, 2001; Neal et al 1999).

Subjective Well-being and Quality of Life

Subjective well-being is a construct that has been examined over many centuries and has been defined in ethical, theological, political, economic and psychological terms

(Lewinsohn, Redner and Seeley, 1991). The SWB is based on the life domains. As a result there are several names used to label it, including happiness, subjective well-being, quality-of-life and life satisfaction.

The overall quality-of-life (QOL) is another approach to life satisfaction. QOL can also be divided into major life domains of satisfaction (e.g. leisure, work, family and personal health). The overall satisfaction with life is therefore functionally related to the satisfaction of all life's domains and sub-domains (Neal et al 1999). In other words, the satisfaction with life can be treated as an aggregate concept based on these domain satisfactions (van Praag, Frijters and Ferrer-i-Carbonell, 2003).

Happiness has been defined as transitory moods of "gaiety and elation" that reflect the affect that people feel toward their current state of affairs (Campbell, 1976). Happiness is also seen as the extent to which positive feelings outweigh negative feelings (Bradburn, 1969). In other words, happiness is an affective mood or state. Life satisfaction on the other hand, is conceived as the 'degree to which an individual judges the overall quality of his life-as-a-whole favorably' that is how well the individual likes the life he/she leads. Life satisfaction is also a conscious global judgment of one's life (Veenhoven, 1991:10).

There are three specific features of subjective well-being. Firstly, it is subjective and as Campbell (1976) pointed out it resides within the experience of the individual. Thus, it focuses on the person's own judgments, not upon some criterion which is judged to be important by the researcher (Diener, Emmons, Larsen and Griffin, 1985). Secondly, it is not just the absence of negative factors, but also includes positive measures and thirdly it includes a global assessment rather than only a narrow assessment of one's life domain (Diener, 1984). The most useful definition of subjective well-being is the implicit theory of subjective well-being where 'humans are regarded as not only capable of appraising events, life circumstances, and themselves, but they make such appraisals continually' (Diener, 1994:106-107). Conversely, subjective stress is an important factor for work satisfaction, retirement dates, work absenteeism and other work related factors (Myrterk et al 1999). Arising from this, appraisals of things in terms of "goodness-badness" associated with pleasant or unpleasant emotions are a universal feature of human beings.

Subjective well-being is likely to have both stable and changeable components (Lykken and Tellegen, 1996; DeNeve, 1999; Emmons and Diener, 1985; McCrae and Costa, 1991; Watson and Clark, 1992). Headey and Wearing's theory (1991:49–50) of stability and change in subjective well-being suggests that, 'for most people, most of the time, subjective well-being is fairly stable. This is because stock levels (social background, personality traits and social networks), psychic income flows (satisfactions and distress arising from life events in a particular time period) and subjective well-being (analogous to an individual's wealth or net worth) is in dynamic equilibrium'. Provided an individual's "normal" (equilibrium) pattern is maintained, subjective well-being is not affected. It is only when events and experiences deviate from the equilibrium patterns that a person's level of subjective well-being changes. In this context it is feasible to study whether holiday taking could affect the equilibrium of the person after the holiday event.

There are several theoretical approaches for explaining subjective well-being (SWB). However, the theories are not mutually exclusive and to some extent, they overlay and can only explain a subset of the existing empirical data. As such there is still no one single approach that can explain all the variance in societal SWB. The telic or endpoint theories of SWB maintain that happiness is gained when some state, such as a goal or need, is reached (Emmons, 1986; Oishi, Diener, and Lucas, 1999; Diener and Fujita, 1995; Kasser and Ryan, 1996; Sheldon and Elliot, 1999). The personality and temperament approaches suggest that individuals who are happy have a genetic predisposition toward happiness. Thus, although subjective well-being changes when momentary events (either positive or negative) depart from their typical pattern, personality characteristics (especially extraversion and neuroticism) will ultimately return the person to his or her previously stable level of SWB (Emmons and Diener, 1985; McCrae and Costa, 1991; Watson and Clark, 1992). The adaptation level theory postulates that people will habituate or get used to both good and bad events and these circumstances will no longer influence SWB over time (Janoff-Bulman, 1978; Headey and Wearing, 1991; Clark, Diener and Georgellis, 2000). However, there is evidence to show that not all people return to the same baseline (hedonic neutrality) and most people return to a slightly happier baseline (Diener and C. Diener, 1996). There is another approach that maintained pleasure and pain are closely related and attaining goals or needs would lead to happiness and therefore, a felt need or deprivation is a necessary ingredient for happiness. In other words, the greater the deprivation (and hence unhappiness), the greater the joy experienced when achieving the goal (Tatakiewicz, 1976). Activity theories maintain that happiness is a by-product of human activity and that self-awareness will decrease happiness. Therefore, concentrating on gaining happiness may be self-defeating (Diener, 1984). The top-down approach assumes that there is a global propensity to experience things in a positive way, and this propensity influences the momentary interactions of an individual with the world (Diener, 1984; Andrews and Withey, 1976). In this context, a person is said to enjoy pleasures because he or she is happy rather than the other way around. Compared to the bottom-up approach, a person should develop a sunny disposition and sanguine outlook as positive experiences accumulate in the person's life. This suggests that happiness is an accumulation of many small pleasures or happy moments. There are also a number of theories that hypothesised that happiness results from a comparison between some standard and actual conditions (Diener and Fujita, 1995; Wood, 1996; Carp and Carp, 1982; Michalos, 1980; McGill, 1967).

The Study Methodology

The sample was chosen by means of the random sampling selection of streets in the Guildford area of the UK and then delivering by hand a covering letter and questionnaire to be collected at a later date, or posted back. In all a total of 3,541 questionnaires were distributed at two points in time, during a twelve-month period, to ensure control over seasonal variations in demand patterns. These responses were then again selected, utilising a strata approach, on the basis of a match to a pre-prepared quota profile (BTA, 1999 profile of holidaymakers and non-holidaymakers) of the characteristics of the study populations of holidaymakers and non-holidaymakers for the UK. The inclusion criteria were that respondents were UK residents who were either taking (at least four nights or more as this meets the criteria for a long holiday) or not taking a holiday outside the UK. Exclusion criteria were related to the trip being for business purposes, pilgrimages, studies, medical treatment or health reasons. The measurement instrument was piloted and tested for validity to ensure a reduction in instrumentation effect.

A total number of 355 respondents represented the holiday taking group and 249 respondents represented the non-holiday taking group. Therefore, this study involves two sample groups: (1) those who are taking a holiday (holiday taking group) and (2) those who are not taking a holiday (non-holiday taking group). The research design was based upon a case control approach. Thus the two groups were utilised on the basis of having (the case group) or not having the condition (control group). This allowed a within and between group comparison. Each sample group filled in two questionnaires at two different points in time. The holiday taking group completed a pre-trip questionnaire (Pre-trip HTG) before the holiday and a post-trip questionnaire (Post-trip HTG) after the holiday. The non-holiday taking group also completed two questionnaires in which the second questionnaire (Period2-NHTG, to ensure the experimental design was robust) was completed within a period of two to six months' after completion of the first questionnaire (Period1-NHTG). Therefore, the general world events were similar for both sets of respondents.

Measures of Well-being

The 9-point scale has been adopted throughout this study and replaces Andrews and Withey's (1976) 7-point Delighted-Terrible Scale. In addition to the adapted use of Andrews and Withey's scale this current study also incorporates Diener et al's (1985) 7-point scale and Kammann and Flett's (1983) graded scale: not at all/occasionally/some of the time/often/all the time. The use of a 9-point scale is to avoid too much "bunching" at the positive end of the scales, which often happens in measures of subjective well-being.

The concept of "subjective" or "sense of well-being" has been operationalised as comprising three separable components: positive affect, negative affect and life satisfaction. Positive and negative affects refer to the affective or emotional aspects of the construct; while life satisfaction refers to the cognitive-judgmental aspects. The instrument for measuring positive and negative affects is based on the Affectometer 2, which is a 20-item scale developed by Kammann and Flett (1983). It has separate items (10-items each) for measuring positive and negative affect (PA, NA). The overall level of well-being is conceptualised as the extent to which positive or pleasant feelings predominate over negative or unpleasant feelings and is reflected in the balance formula for calculating the total score: PA-NA. The Affectometer 2 has been tested for its psychometric properties. Each respondent is asked to indicate how often he/she experienced this feeling during the past few weeks on a scale of 1 (not at all) to 9 (all the time).

Life satisfaction is measured on two levels: global and specific life domains. The global evaluation of life-as-a-whole is made up of two measures. Firstly, Andrews and Withey's (1976) measure of 'How do you feel about your life as a whole?' asked twice in the questionnaire on a scale of 1 (tremendously unhappy) to 9 (tremendously happy). The scores on these two items are summed and averaged out to form a composite measure of Life3. Secondly, the Satisfaction With Life Scale (SWLS) developed by Diener, Emmons, Larsen and Griffin (1985) which is made up of 5-items. The respondents were asked to indicate how they feel for each of the 5-items on a scale of 1 (completely disagree) to 9 (completely agree). The scores are summed with the least possible score at 5 indicating lowest satisfaction and the highest possible score at 45 indicating highest satisfaction. Life satisfaction is also measured on 12 specific life domains: Family, Friends, Home, Interpersonal Relationships, Economic

Situation, Job, Leisure, Neighborhood, Self, Services and Infrastructure, Health and Nation. Multi-items measures adopted from Andrews and Withey's (1976) surveys are used to measure each specific life domain and respondents were asked how they felt about each of the items on a scale of 1 (tremendously unhappy) to 9 (tremendously happy). The multi-items used to measure each specific life domain are summed and averaged to form a composite measure of a specific life domain.

Non-parametric tests are used to test group differences as most of the data distributions when tested by the Kolmogorov-Smirnov statistic are not normally distributed. However, for this type of data this is not unusual and in order to provide an indication of the magnitude of the difference between groups, the effect size statistic, eta squared (Pallant, 2001) is used, which is calculated from information obtained from the parametric t-tests. For this purpose, the independent-samples t-test and the paired-samples t-test are used.

Sample Group Characteristics

The sample characteristics of the holiday taking group (355 respondents) in terms of gender are: 49.9% males and 50.1% females; age groups: 16–24 (13.8%), 25–34 (21.7%), 35–44 (16.9%), 45–54 (20.8%), 55–64 (13.8%) and 65 and above (13%); job categories: AB-category (31%), C1-category (36.9%), C2-category (18%), DE-category (14.1%). The sample characteristics of the non-holiday taking group out of 249 respondents (those who completed both questionnaires) in terms of gender are: 49.8% males and 50.2% females; age groups: 16-24 (16.1%), 25–34 (18.1%), 35–44 (16.1%), 45–54 (15.2%), 55–64 (11.2%) and 65 and above (23.3%); job categories: AB-category (8.8%), C1-category (21.7%), C2-category (20.9%), DE-category (48.6%).

The data for both the holiday taking group and non-holiday taking group were subjected to some preliminary analysis in order to partial out any other effects that might affect the well-being of the respondents, other than that of holiday-taking. In addition the non-holiday taking group was also asked whether they had been on a recent holiday and whether they were planning for a holiday within the next six months, or had experienced any other major event recently that caused them to feel tremendously happy, unhappy or both. Major events could refer to a marriage, birth of a new baby, job promotions, deaths, etc. The results showed that for the holiday taking group, the presence of a major event had only affected significantly the evaluation of the Leisure domain as confirmed by the Mann-Whitney test with $p < 0.05$. Thus, subsequent analysis of the Leisure domain did not take into account those respondents. As for the respondents of the non-holiday taking group, the results indicated that the presence of other major events had not significantly affected the evaluations of the subjective well-being measures.

Research Findings

The subjective well-being evaluations of the holiday taking group (HTG)

Figure 1 illustrates the possible effects of holiday taking on the state of well-being of the HTG at three different stages: Pre-trip, at leisure (on holiday destination) and Post-trip.

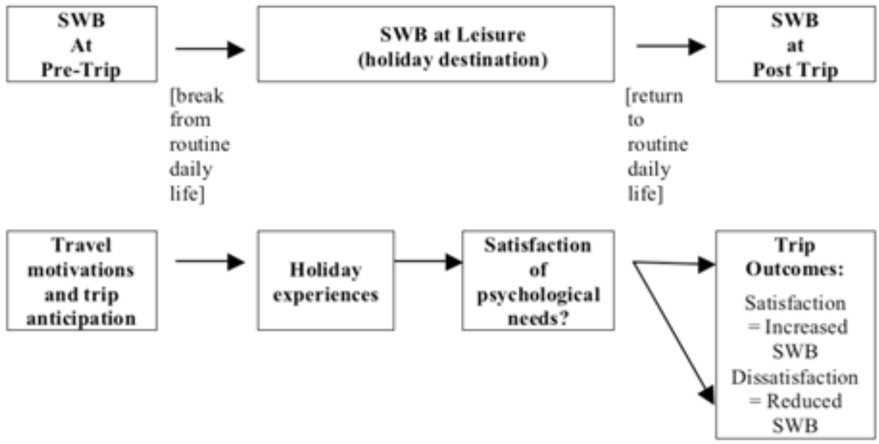


Figure 1
Effects of holiday taking on subjective well-being for HTG.

At the Post-trip level, the findings indicated that the respondents had achieved all their travel motivations except for the need to "feel rejuvenated and recharged". Yet, the respondents were still very happy with what they had achieved for this need although not to the extent of what was expected before the holidays. The respondents also indicated that they were very satisfied with their holiday travels. In relation to this, Pizam, Neumann and Reichel (1978:16-17) pointed out that a tourist is satisfied when 'experiences compared to expectations result in feelings of gratification'. Satisfaction in this context refers to a level of 'happiness resulting from a consumptive experience.' The next question that arises is how pervasive and long lasting are the effects of positive moods generated from satisfying holiday experiences on the sense of well-being of the holidaymakers?

A comparison between the state of well-being of the holiday taking group at Pre-trip and Post-trip is shown in Tables 1–3.

Table 1

Global and affect measures of Subjective Well-being for pre-and post-trip HTG.

Subjective Well-Being Measures	Pre-trip HTG				Post-trip HTG			
	M	Mean	S.D.	No.	M	Mean	S.D.	No.
Life Satisfaction (Life3)	7	6.987	1.23	355	7	7.107	1.20	355
Satisfaction with Life Scale (SWLS)	31	30.778	7.12	352	33	31.778	7.59	355
Positive Affect (PA)	62	60.467	12.24	351	65	63.577	11.79	352
Negative Affect (NA)	29	31.221	14.28	348	27	30.211	14.44	350
Current Affect (CA)	31	29.304	22.77	349	36	33.294	23.13	350

Note: M = Median

In terms of global well-being measures, the Wilcoxon Signed Ranks test indicated almost significant difference for Life3 as $p > 0.054$ but significant difference for SWLS as $p < 0.01$. This means the respondents are happier with their life satisfaction when SWLS is used, and when the Life3 result is rounded down, happy after their holidays. It would be reasonable to conclude that the respondents are generally happier with their life-as-a-whole after their holidays. In terms of the affect measures, the Wilcoxon Signed Ranks test indicated significant With regard to Negative Affect, the Wilcoxon Signed Ranks test indicated no significant difference as $p > 0.05$. This indicates the respondents experienced more or less the same amount of unpleasant feelings before and after their holidays. With regard to Current Affect, the Wilcoxon Signed Ranks test indicated significant difference with $p < 0.001$. This means the respondents experienced a higher amount of pleasant feelings after their holidays.

Table 2

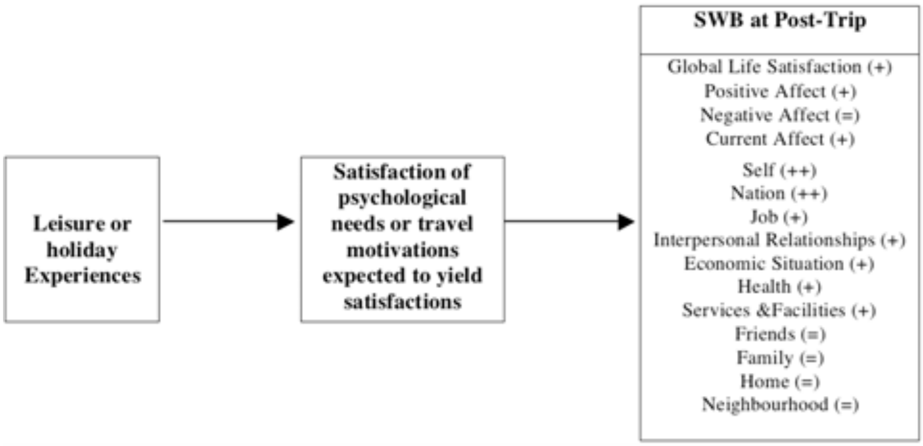
Specific measures of Subjective Well-being for Pre-and Post-trip HTG.

Specific Life Domains	Pre-trip HTG				Post-trip HTG			
	M	Mean	S.D.	No.	M	Mean	S.D.	No.
Friends	7.5	7.245	1.15	355	7.5	7.242	1.07	355
Family	7.67	7.216	1.50	355	7.33	7.196	1.42	355
Home	7	6.845	1.31	355	7	6.935	1.26	355
Interpersonal Relationships	7	6.801	1.06	355	7	7.023	1.02	355
Economic Situation	7	6.754	1.43	355	7	6.966	1.22	355
Job	6.5	6.416	1.29	335	7	6.669	1.19	335
Leisure	6.33	6.342	1.45	276	6.67	6.532	1.22	355
Neighborhood	6.5	6.294	1.36	355	6.5	6.489	1.30	355
Self	6.3	6.221	1.22	355	6.67	6.546	1.20	355
Services and facilities	6	6.116	1.23	354	6.5	6.393	1.11	355
Health	6	5.966	1.42	355	6.5	6.218	1.44	355
Nation	5	4.749	1.19	355	5	5.148	1.32	355

Note: M = Median

A Wilcoxon Signed Ranks test indicated significant differences for eight of the specific life domains: Interpersonal Relationships ($p < 0.001$), Self ($p < 0.001$), Services and Facilities ($p < 0.001$), Health ($p < 0.001$), Nation ($p < 0.001$), Job ($p < 0.01$), Economic Situation ($p < 0.01$), and Leisure ($p < 0.01$). This means the respondents are happier with their Interpersonal Relationships, Self, Services and Facilities, Health, Nation, Job, Economic Situation and Leisure domains after their holidays. However, there is no significant difference for the specific life domains of Friends, Family, Home, and Neighborhood as $p > 0.05$. This means the respondents feel more or less the same about their Friends, Family, Home and Neighborhood domains before and after their holidays. Such a finding could be attributed to the "emotional stress" experienced during holidays (Myrtek et al 1999). In other words, holidays enable a 24/7 social contact with members of family and close friends (e.g. travelling together, everyone in the travel party using same confined spaces). Hence the potential positive affect of vacations on these domains can be reduced by the emotional strain (and guilt?) experienced. Thus, the affect of holiday taking seems to have caused the respondents to experience a higher sense of well-being when compared to their sense of well-being before the holidays.

On one hand, it could be argued that the use of "effect sizes" as an indicator of the effects of holiday taking might not have adequately captured the very essence of the importance of holiday taking or leisure travels. On the other hand, it could also be argued that this is precisely one of the reasons holiday travels are recurrent activities or essential annual expenditures, especially for people in developed nations. The small effect sizes of holiday experiences could wear off quickly and thus need to be "replenished" frequently, especially for individuals with felt needs that could only be satisfied with holiday travels. Nevertheless, the use of the "effect sizes" in this study is to give an indication as to the "strength" or "size" of change in SWB caused by holiday taking, as the mean differences between the SWB measures in Pre-trip and Post-trip seems rather small. Figure 2 shows the results of holiday taking on the holiday-taking group.



Note: (++) = positive change (moderate effect size), (+) = positive change (small effect size), (=) = no change

Figure 2
The results of holiday taking on subjective well-being of HTG.

Pre-trip subjective well-being evaluations of the HTG in terms of time difference

This study also attempted to find out whether the waiting period itself has any effects on the sense of well-being of the respondents. In other words, do the holidaymakers feel a higher sense of well-being as the day of departure for their holiday trip approaches, or do the results suggest that it makes no difference? The findings indicated that there are no significant differences in the SWB evaluations of those who have to wait between 1–30 days, 31–90 days and 91 days or more for their holiday departures, except for the Family domain. Those who have 91 or more days to wait for their holiday departures are happier with their Family domain compared to those with less than 90 days to wait for their holiday departures. Again this could be a reflection of the past learning experience of holidays and emotional stress as well as the anticipation of both the positive and negative affect of intensive social interaction during vacation.

Effects of holiday taking in terms of time difference

The study also attempted to find out whether the effects of holiday taking are still evident and remain strong upon immediate return from holiday or weaken and dissipate upon return to routine daily life. The findings indicated no significant difference between the three time periods (1–30 days, 31–60 days, and 61 days and more) for all the well-being measures except for the specific life domains of Economic Situation and Neighborhood. The reported feelings of well-being exhibit similar tendencies between those who reported their well-being immediately after their holidays and those who reported their well-being two or three months after their holidays. It is observed that for the specific life domain of Economic Situation and Neighborhood, the respondents who reported their well-being 61 days or more after their holidays are happier with these two domains. This demonstrates that the effects of holiday taking have remained more than two months after the holiday event.

A comparison of subjective well-being evaluations of pre-trip HTG and period1-NHTG

The state of well-being of the holiday taking group at Pre-trip HTG and Period1-NHTG are also compared and the results shown in Tables 3–4.

Table 3
Global and affect measures for the holiday taking and non-holiday taking group.

Global well-being	Holiday Taking Group (Pre-trip HTG)				Non-Holiday Taking Group (Period1-NHTG)			
	M	Mean	S.D.	No.	M	Mean	S.D.	No.
Life3	7	6.987	1.22	355	7	6.685	1.52	249
SWLS	33	30.778	7.12	352	30	28.710	8.05	248
Positive Affect (PA)	62	60.467	12.24	351	60	59.025	12.78	244
Negative Affect (NA)	29	31.221	14.28	348	35	35.062	14.08	241
Current Affect (PA – NA)	31	29.304	22.76	346	26	23.850	23.42	240

Note: M = Median

A Mann-Whitney test indicated significant difference for Life3 as $p < 0.05$ and SWLS as $p < 0.01$. This means that those who are waiting to go on a holiday are happier with their global well-being or life-as-a-whole, when compared to the non-holiday taking group. However the effect sizes are small for Life3 (eta squared = .011) and SWLS (eta squared = .017).

For Positive Affect, a Mann-Whitney test indicated the difference is not significant as $p > 0.05$. This means both the holiday taking group and non-holiday taking experience more or less the same amount of pleasant feelings. In terms of Negative Affect, it is observed that the holiday taking group reported a lower amount of unpleasant feelings (mean = 31.22) compared to the non-holiday taking group (mean = 35.06). A Mann-Whitney test indicated this difference is very significant as $p < 0.001$. This means the holiday taking group experiences a lesser amount of unpleasant feelings compared to the non-holiday taking group. As for Current Affect, it is also observed that the holiday taking group reported a higher amount of net positive affect (mean = 29.3) compared to the non-holiday taking group (mean =23.85). A Mann-Whitney test confirmed this difference is significant. Overall, the findings indicated that those who are waiting to go on a holiday experienced more pleasant feelings and less unpleasant feelings compared to the non-holiday taking group. However, the effect sizes are small for Negative Affect (eta squared = 0.017) and Current Affect (eta squared = 0.013). A comparison of the evaluations of the specific life domains is shown in Table 4.

Table 4

Measures of specific life domains for holiday taking group and non-holiday taking group.

Specific Life Domains	Holiday Taking Group (Pre-trip HTG)				Non-Holiday Taking Group (Period1-NHTG)			
	Median	Mean	S.D.	No.	Median	Mean	S.D.	No.
Friends	7.5	7.245	1.15	355	7.5	7.235	1.01	196
Family	7.67	7.216	1.49	355	7	6.872	1.62	196
Home	7	6.845	1.30	355	7	6.725	1.34	196
Interpersonal Relationships	7	6.801	1.05	355	7	6.797	1.24	249
Economic Situation	7	6.754	1.43	355	6.5	6.217	1.60	196
Job	6.5	6.416	1.28	335	6.5	6.377	1.45	170
Leisure	6.33	6.342	1.44	276	6.33	6.117	1.45	196
Neighborhood	6.5	6.294	1.35	355	6.5	6.309	1.41	248
Self	6	6.221	1.21	355	6.29	6.017	1.40	196
Services & Infrastructure	6	6.116	1.22	354	6	5.916	1.33	249
Health	6	5.966	1.41	355	5.75	5.674	1.62	196
Nation	5	4.749	1.18	355	4.5	4.602	1.37	249

The results in Table 4 indicated three significant differences between the holiday taking group and the non-holiday taking group. The Mann-Whitney test showed significant differences for the specific life domains of Economic Situation ($p < 0.001$), Family ($p < 0.01$) and Health ($p < 0.05$). This means those who are waiting to go on holiday experience a higher sense of well-being with regard to their Economic Situation, Family and Health domains when compared to the non-holiday taking group. Again, the effect sizes are small for Economic Situation (eta squared = 0.027), Family (eta squared = 0.011) and Health (eta squared = 0.008) domains.

Comparison of subjective well-being evaluations of post-trip HTG and period2-NHTG

The evaluations of the holiday taking group (HTG) and the non-holiday group (NHTG) are also compared at Post-trip (after the holidays) and Period2 (second evaluation) in terms of global well-being, affect and specific life domains and are shown in Tables 5–6.

Table 5

Global and affect measures for the holiday taking and non-holiday taking group.

Subjective Well-being Measures	Holiday Taking Group (Post-trip HTG)				Non-holiday Taking Group (Period2-NHTG)			
	M	Mean	S.D.	No.	M	Mean	S.D.	No.
Life3	7	7.107	1.20	355	6.5	6.345	1.41	249
SWLS	33	31.778	7.59	355	29	28.231	8.41	247
Positive Affect (PA)	65	63.577	11.79	352	57	56.803	13.71	249
Negative Affect (NA)	27	30.211	14.44	350	36	36.297	15.05	249
Current Affect (PA – NA)	36	33.294	23.13	350	22	20.51	25.20	249

Note: M = Median

The results in Table 5 show that the respondents of the holiday taking group obtained higher median and means for Life3 and SWLS compared to the non-holiday taking group. A Mann-Whitney test indicates this difference is significant at $p < 0.001$. This indicates the holiday taking group is happier with their life-as-a-whole or life satisfaction after their holidays when compared to the non-holiday taking group.

In terms of the affect measures, a Mann-Whitney test indicated significant differences for Positive, Negative and Current Affect as $p < 0.001$. This means the holiday taking group experiences more pleasant feelings and a lesser amount of unpleasant feelings after their holidays when compared to the non-holiday taking group. The effect sizes are moderate for Positive Affect (eta squared = 0.062) and Current Affect (eta squared = 0.063) and small for Negative Affect (eta squared = 0.04). The evaluations of the holiday taking group at Post-trip and the non-holiday taking group at Period2 in terms of specific life domains are shown in Table 6.

Table 6

Measures of specific life domains for holiday taking and non-holiday taking groups.

Specific Life Domains	Holiday Taking Group (Post-trip HTG)				Non-holiday Taking Group (Period2-NHTG)			
	Median	Mean	S.D.	No.	Median	Mean	S.D.	No.
Friends	7.5	7.242	1.07	355	7	6.584	1.46	249
Family	7.33	7.196	1.42	355	7	6.718	1.60	247
Home	7	6.935	1.26	355	6.5	6.390	1.47	249
Interpersonal Relationships	7	7.023	1.02	355	7	6.737	1.14	249
Economic Situation	7	6.966	1.22	355	6.5	6.080	1.50	249
Job	7	6.669	1.19	335	6.5	6.385	1.38	170
Leisure	6.67	6.532	1.22	355	6	6.216	1.46	249
Neighborhood	6.5	6.489	1.30	355	6.5	6.108	1.32	249
Self	6.67	6.546	1.20	355	6	6.007	1.26	249
Services & Infrastructure	6.5	6.393	1.10	355	6	5.960	1.30	249
Health	6.5	6.218	1.43	355	5.5	5.480	1.53	249
Nation	5	5.148	1.32	355	5	4.759	1.38	249

The results in Table 6 indicated that the holiday taking group obtained higher means for all specific life domains when compared with the non-holiday taking group. A Mann-Whitney test indicates significant difference for the Job domain ($p < 0.05$) and the other specific life domains ($p < 0.001$). However, the effect sizes are small for all the specific life domains (eta squared 0.058 and below). When Post-trip HTG is compared with Period1-NHTG, the Mann-Whitney test indicated significant differences for seven of the specific life domains of Economic Situation, Job, Leisure, Self, Services and Facilities, Health and Nation with $p < 0.001$. The effect sizes are small (eta squared less than 0.06), except for the Job domain with large effect size (eta squared = 0.142), and moderate effect size for the Nation domain (eta squared = 0.065). This finding suggests that the holiday taking group is happier with most of their specific life domains after having their holidays when compared to the non-holiday taking group, although with mostly small effect sizes.

Subjective well-being evaluations of NHTG

A comparison between the evaluations of the non-holiday taking group at Period1- and Period2-NHTG indicated significant difference for Life3, Positive Affect and Current Affect, as indicated with the Wilcoxon Signed Ranks test with $p < 0.05$. This means the respondents are less happy with their life-as-a-whole and experienced a lesser amount of pleasant feelings in Period2 when compared with Period1. However, the respondents experienced more or less the same amount of unpleasant feelings in Period1- and Period2-NHTG. With regard to the specific life domains, the Wilcoxon Signed Ranks test indicated significant differences for Friends ($p < 0.001$), Family ($p < 0.05$), Home ($p < 0.001$), Economic Situation ($p < 0.005$), Neighborhood ($p < 0.05$), Leisure ($p < 0.001$), and Health ($p < 0.05$) domains. This means that the state of well-being of the non-holiday taking group has declined in certain aspects of their well-being in Period2. It is speculated that one of the possible causes for this apparent decline in the state of well-being at Period2 (although the effects of other major events are found not to be significant) could be due to the existence of some felt needs which are not satisfied. The existence of such felt needs or deprivations could create tension states within the individual and cause the individual to experience a sense of disequilibrium, which is unpleasant and could affect SWB negatively (Veenhoven, 1991). It would appear that the existing theoretical perspectives for explaining changes in SWB has not included the element of felt needs or deprivation which create unpleasant tension states and affect a person's level of SWB. However, from the SWB perspective, it is only events which deviate from a person's normal events that change a person's normal level of SWB, although the satisfaction of felt needs could be explained by the telic or end-point theories.

NHTG evaluations in terms of time difference

This study also attempted to find out whether the evaluations of the respondents of the non-holiday taking group are stable. The research findings indicated that the respondents are less happy with their affective feelings (positive affect and negative affect) as well as with their Self and Health domains at Period2 when compared to their state of well-being at Period1. This suggests that the affect component of well-being is more likely to change over time. In addition, the Self and Health domains are also more likely to change over time and this could perhaps be attributed to the fact that these are domains directly related to the individual's sense of well-being.

From non-holiday taking to holiday taking for NHTG

The study also compared the three states of well-being of the respondents from the NHTG, who later changed their minds and went on holiday travels. The findings indicated that the respondents who subsequently went on holiday travels did experience a higher sense of well-being when compared with their state of well-being at Period1 and Period2. This provides additional support to the study findings that holiday taking does impact positively on the sense of well-being of holidaymakers, although this sample size is small and not representative of the population characteristics of the holiday taking group.

Conclusion

The study findings indicated that holiday taking did alter or impact on the subjective or sense of well-being of the holidaymakers: i) Respondents experienced a higher amount of pleasant feelings after their holidays; ii) however, the respondents feel more or less the same about their Friends, Family, Home and Neighborhood domains before and after their holidays; iii) the effects of holiday taking did not cause the respondents to feel worse after their holidays. Overall, the holiday taking group has been found to experience a higher sense of well-being after their holidays. This is attributed to the belief that they are satisfied with their holidays and such satisfaction has generated positive moods to enhance their sense of well-being. In this respect, the effects of holiday taking would be best explained from the telic or end-point perspectives. This fits with the view that people travel because they have been motivated by some felt needs, which are psychological in nature and can only be satisfied by holiday travel. If the holidaymaker feels that most of his or her travel expectations (travel motivations) have been met or satisfied, he or she will most likely appraise the holiday as satisfying.

Furthermore, the sense of well-being of the holiday taking group when compared to the non-holiday taking group indicated those taking a holiday experienced a higher sense of well-being before and after the holidays. The holiday taking group experiences more pleasant feelings and a lesser amount of unpleasant feelings after their holidays when compared to the non-holiday taking group. The effect sizes are moderate for Positive Affect (eta squared = 0.062) and Current Affect (eta squared = 0.063) and small for Negative Affect (eta squared = 0.04). Nevertheless, holiday taking as a form of leisure activity and experience can help individuals to enhance their sense of well-being. This is based upon the premise that going on a holiday represents a distinct break from normal events and the holiday experience has had a positive effect to change the respondents' normal levels of subjective well-being.

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Chapter 9

How Tourists Self Deceive

Exploring The Gap Between Travellers' Intentions And Actual Consumption Behaviour

By Roger March

Abstract

Few empirical studies have investigated the phenomenon of unplanned and impulsive behaviour in a tourism context. This study bridges this empirical gap and offers new insights into the extent to which consumers change their consumption behaviours between planned and actual consumption. Within a tourism destination setting, the study analyses two data sets for consumers (n = 2,239) reporting on their immediately upcoming planned behaviours and consumers (n = 2,362) reporting on their very recentl behaviours. Empirical results include (1) the behaviours of spending and activities undertaken increase substantially and significantly between the planned and reported stages, (2) while length of stay does not increase significantly, and (3) neither experience nor travel party size significantly influences any differences between planned and realised behaviours.

Introduction

Models of consumer behaviour typically treat intention (or purchase decision) as the immediate antecedent of purchase (e.g., Howard & Sheth, 1969; Peter & Olson, 1999; Engel, Blackwell and Miniard, 1993). The resulting implication is that intention and the subsequent consumption behaviour are fundamentally indistinguishable. Similarly, behaviours that are not planned or intentions that are not actuated have not been conceptualised in consumer behaviour models. Foxall (2000:93) labels marketing theory's aversion to the study of unplanned and impulsive behaviour as "pathological".

The extant literature includes substantial empirical research into the relationship between planned purchases and actual consumption. Typically, these studies aim to measure intentions for the purpose of predicting future consumption behaviour. Many studies examined the relationship between purchase intentions and purchase behaviours for durable goods (e.g., Clawson, 1971; and Ferber and Piskie, 1965) and non-durable goods (e.g., Gormley, 1974; Tauber, 1975; and Warshaw, 1980). Young, DeSarbo and Morwitz (1998:189) conclude, 'Overall, based on empirical evidence, intentions appear to almost always provide biased measures of purchase propensity, sometimes underestimating actual purchasing and other times overestimating actual purchasing.'

Most of these studies focus on the predictive powers and accuracy of intentions. This reflects most models of consumer behaviour, which incorporate intentions as an important predictor variable to forecast sales (Kalwani & Silk, 1982; Morwitz & Schmittlein, 1992). Few distinctions are made between buyer intentions and buyer actions. Any divergences between intentions and behaviour are explained in terms of situational variables. In the words of Juster (1964), 'purchases (actions) are directly related to (or predicted by) intentions, modified by the incidence of unforeseen circumstances' (p67).

One dimension of the issue regarding the relationship between intentions and actual behaviour that has been examined in marketing is the concept of "unplanned" behaviour. Stern's (1962) seminal article proposed four categories of unplanned purchases: "pure" impulse buying, characterised by a total lack of preplanning; reminder impulse buying, whereby purchases are sparked by previous personal experience or recall; suggestion impulse buying, where the purchaser sees the purchased product for the first time and buys it; and planned impulse buying, typified by a shopper entering a store with some specific purchase in mind, but with the expectation and intention of making other purchases dependent on such things as price and coupon specials. Early marketing studies typically used the terms "unplanned behaviour" and "impulse buying" interchangeably, with the research settings confined mainly to the consumer goods/retailing sector (Kollat and Willett, 1967; Bellenger, Robertson, and Hirschman, 1978; Deshpande and Krishnan, 1980; Cobb and Hoyer, 1986). Exceptions include a study that examined the relationship between decision plans and choice behaviours in a real estate setting (Park, Hughes, Thukral & Friednmann, 1981) and work into customer retention and unplanned purchases on the world-wide-web (Koufaris et al, 1999).

While an increasing number of scholars have developed an interest in impulse buying since the 1980s (Gardner & Rook 1988; Rook & Fisher 1995; Dittmar, Beattie, & Friese, 1996; Beatty and Ferrell, 1998; Weun, Jones & Beatty 1998; Agee and Martin, 2001), the characteristics and antecedents of unplanned behaviour in the broader sense remain unexplored and unknown. One of the reasons for this lack of interest may be the complexity of the "unplanned" concept. Behaviour can be unplanned yet done, either in the form of impulse buying (e.g., purchase of a chocolate bar at the supermarket check-out counter) or (for the want of a better term) "unplanned purchases" (when knowledge of and interaction with the task environment and time pressure combine to force a decision that otherwise would have been foregone, Bettman, 1979).

Planned and Unplanned Studies in Tourism

In an exhaustive review of research in leisure and tourism, Ritchie (1994) laments the lack of attention paid to the context of decision-making in consumer behaviour, while Otto and Ritchie (1996) highlight the challenge of examining consumer behaviour in the tourism setting:

> 'Perhaps more than any other service industry, tourism holds the potential to elicit strong emotional and experiential reactions from consumers … utilitarian and rational information processing schemes which focus on functional or purely attribute-based elements are incommensurate with leisure and tourism' (Otto and Ritchie, 1996:168).

Young and Kent (1985) examined planned and actual behaviours related to leisure campers, and found that intentions were slightly more influenced by the respondents' motivations than by the composition of the social group they were travelling with. Crotts and Reid (1993) found that most visitors to Alachuca County in Florida had decided upon recreational activities prior to arrival. Those travellers who made "activity decisions" after arrival were typically long-haul, international visitors. In Tsang's (1993) survey of information search and travel planning behaviour of international visitors to New Zealand, over 40 per cent of respondents indicated they pre-planned no vacation activities (cited by Hyde, 2000). Only a minority of visitors had pre-planned their length of stay in each sub-destination within New Zealand.

Jeng (1997) asked respondents to imagine a 2-4 day domestic vacation trip, and consider what elements they might plan before departure. He identified a set of core sub-decisions made *before* departure, including date of trip, primary destination, location of overnight stay, and travel route. He went on to identify a set of secondary sub-decisions, made before departure but considered to be flexible, including choice of attractions and activities. This subset made way for a third set of *en route* decisions, including where to dine, where to shop, and where to stop and rest. The one important caveat in this study was that dependents were asked to consider a short domestic trip, not an overseas one.

Stewart and Vogt (1999) adopted a case-based decision theory to understand how consumers plan for, and actuate, vacation travel. This approach assumes that consumers deal with uncertainty by basing their judgments of the current situation (or alternatives) on similar cases they have encountered previously; in other words, on past experience. The tourist plans for a series of activities and experiences for a future trip, but while he/she is on-site, a cycle of actuation-failure-revision-actuation occurs. Intuitively, this scenario approximates the complex process by which many of us decide upon plans, and then alter, abandon or implement those plans.

Perdue (1986) touched upon the subject in a modest investigation that sought to empirically verify the proposition that unplanned yet realised behaviour yielded higher spending than unplanned and unrealised behaviour. He found that consumers who purchase a product that they had not planned for are likely to express satisfaction with the product as a means of justifying the purchase to themselves and other members of their travelling party. Ajzen and Driver (1992) used leisure activities as the research setting for testing the theory of planned behaviour. They found that the theory was useful in predicting influences upon intentions and actual behaviours from intentions. The research had the limitation of being confined to college students and only five leisure activities were studied. As the authors concluded, future research needed to examine other recreation activities and to use more accurate and valid reporting means.

It is worth remembering that existing models of decision behaviour such as the Theory of Planned Behaviour have been developed for tangible products, rather than intangible services such as tourism products. The tourism product is an experiential product with emotional undertones whose decision process differs vastly from the rational, problem- solving scenario applied to many tangible products. Majo and Jarvis (1990) argue that 'travel is a special form of consumption behaviour involving an intangible, heterogeneous purchase of an experiential product' (cited in Gilbert, 1991:98). As a consequence, existing models omit important realities of tourist behaviour. To cite Um & Crompton (1990):

> 'It should be noted that perceptions of alternative destinations' physical attributes in the awareness set … are susceptible to change during the period of active solicitation of information stimulated by an intention to select a travel destination' (p437).

Finally, several writers have argued that the benefits *realised* from a consumption experience may be more useful to understand than the benefits that consumers say they intend to seek (Dann, 1981; Pearce & Caltabiano, 1983; Woodside & Jacobs, 1985; Shoemaker, 1994). This paper adopts this imperative. Research that investigates the process by which intentions are actualised into actual behaviours and elucidates the influences that result in unplanned as well as planned behaviours has a valuable contribution to make to the study of marketing and tourist behaviour.

Hypotheses

Three hypotheses related to the relationship between planned and actual behaviours are posited. The first proposition tested is whether consumers' plans exceed their actual consumption behaviours.

H_1: Realised consumption behaviours are greater than planned for most specific services related to a purchased service system.

The second hypothesis tests for the influence of three contingencies common in consumer behaviour and consumption plans: product experience, motivation, and composition of the travel party. Experience teaches people how to plan and the actual behaviour of consumers with product experience will more closely approximate their plans than that of consumers with no or little product knowledge (Stewart & Vogt, 1999). Motivations underlying a leisure trip will have a significant influence on the traveller's behaviour (Morrison, 1996); for example, travellers visiting friends or relatives are more likely to rely on the advice of their hosts, less likely to use product information and therefore more likely to deviate between planned and eventual behaviours (Gitelson and Crompton, 1983). In leisure settings, the behaviour of travellers is heavily influenced by the composition of the travelling party (McIntosh and Goeldner, 1990). Leisure travel is a product that is jointly consumed, and leisure travel activities reflect the influence – direct and indirect – of all those travelling together (Chadwick, 1987).

H_2: The level of matching between planned and realised actions will vary as a function of contingency factors: composition of travel party, product experience, and motivations.

The third proposition examines the relationship between shifts in planned and realised behaviours according to increases in the time spent in the consumption system. All other things being equal, we may assume that the longer the length of stay, the greater is the likelihood that individuals will engage in unplanned behaviours.

H_3: Increases in length of stay, in a destination region between planned and actual behaviours, associate with increases in the number of destination-area consumption activities, although the increase in the number of activities by length of stay will be greater for realised rather than planned behaviours.

Methodology

Two large-scale data files, from face-to-face entry and exit surveys to Prince Edward Island, Canada were used to investigate the research questions. The entry survey consisted of 2,239 individual interviews and the exit survey comprised 2,362 persons interviewed. The long-interview method (McCracken, 1988) was employed for data collection for both data sets. The surveys were undertaken by the Marketing Agency (a PEI government-sponsored organisation). The data were collected using a 13-page entry questionnaire and a 12-page exit questionnaire. The analytical approach is exploratory and empirical. Group-level analysis (Bass, Tigert and Lonsdale, 1968) was performed on data from the two surveys. A quasi-experiment between-groups research design is made possible from the use of the two data sets (Cook and Campbell 1979); this procedure ensures that the same respondents being asked earlier planning questions do not sensitise responses in the second data set.

Findings

Planned and reported spending & length of stay

Significant differences occur between the planned budget for, and final trip expenditure, on PEI. Table 1 shows that spending increased from an average stated budget of $388 per respondent (*n* = 1,231; SD=408) to $505 (*n* = 2,105; SD=576)) for stated spending in the exit survey. A two-sample t-test revealed a significant relationship between the two means (p=.000; *t*=6.26). Overall, average reported spending behaviour was 30 percent higher than planned spending. Since realised spending was significantly greater than planned spending, this finding supports H_1.

Planned length of stay, expressed in terms of number of overnight stays, was 3.7 nights, *n* = 2,341; SD = 5.5), compared to the reported realised average number of 4.2 (*n* = 2,138; SD = 4.9). A two-sample t-test revealed a significant relationship between the two means. Expressed as a percentage, the difference between planned and reported length of stay behaviour was 15 percent. Since realised length of stay was significantly greater than planned length of stay, H_1 is supported.

Planned and realised activities

Respondents were queried about their intention and consumption of thirteen leisure activities. It was hypothesised that vacationers actually engage in a greater number of activities than they plan to because travellers often find themselves in destination situations that include convenient-to-do and previously unknown attractions/activities. An independent-samples *t*-test was applied after recoding and combining the data from the entry and exit surveys. The mean for intended attractions in the entry survey was 2.7 (SD = 2.7), compared to a mean of 6.1 (SD = 2.5) in the exit survey. A significant difference (p =.000) was identified between the two groups. This finding confirms H_1.

Experience influence on planned and realised behaviours

"Experience" was classified into three types: first-timers, moderately experienced (four or less previous visits) and "heavy repeaters" (five or more previous visits). Four travel party groups were compared: visitors travelling alone, one couple groups, one family groups, and groups comprising two or more families. For motivations, we examined two groups: those seeking familiarity and those seeking history and culture. Table 1 shows the planned and realised levels of spending and length of stay for the three levels of experience. Regression analysis was performed after converting each of the twelve cases to Z scores as unweighted values. Planned and realised values were treated as a single variable, called "strategy". The equation used to run regression analysis is as follows: [Behaviour = a + b1 Strategy + b2 Experience + b3 Strategy by Experience] *where* for Strategy 0 = planned and 1 = realised *and* for Experience: 0 = none; 1 = moderate; 2 = heavy. For spending, regression analysis rendered a p-value of 0.69 for the "Experience by Strategy" variable, indicating that experience did not significantly influence the differences between planned and realised spending and planned and realised length of stay.

Table 1

Planned and realised consumption behaviours by degree of experience.

	Planned			Realised		
	First-timers n =1236	**Moderately experienced** n=489	**Heavy experienced** n=637	**First-timers** n=1184	**Moderately experienced** n=397	**Heavy experienced** n=524
Spending	$394	$432	$352	$518	$532	$453
Length of stay	3.0	3.8	4.8	3.5	4.6	5.5

A similar finding was found for "Size of Party" variable, where p = 0.70. Table 2 indicates the planned and realised behaviours by the four levels of party size. In short, the proposition that greater experience or smaller travel party reflects significantly smaller differences between planned and realised consumption behaviours is not confirmed.

Table 2

Planned and realised consumption behaviours by size of travel party.

	Planned				Realised			
	Alone n=157	One couple n=1076	One family n=502	Two or more families n=200	Alone n=182	One couple n=957	One family n=467	Two or more families n=139
Spending	$263	$370	$474	$390	$343	$475	$638	$520
Length of stay	5.4	3.5	4.2	3.1	6.0	4.2	4.5	3.8

Planned and realised activities by length of stay

Increased length of stay relates typically with increased number of consumption activities in the consumption system. We would expect, for example, a visitor staying for one night to engage in less consumption behaviour than one staying several nights. Vacationers tend to under-estimate the number of activities they eventually engaged in at the entry into the PEI. A significance test using the Fisher Z-transformation (Papoulis, 1990) to test for the difference between the two correlation coefficients revealed they were highly significant ($p < 0.05$). Multiple regression analysis was used to test whether the gap between the planned and the actual number of activities increases with an increase in the length of stay. A significant amount of variance in the dependent variable was found (F change = 52.33, p=.000). This finding supports H_3.

Conclusions and Suggestions for Further Research

The literature offers a number of explanations for differences between planned and realised behaviours. First, studies have found that the strength of the intent-behaviour relationship differs across types of products (Bemmaor, 1995; Ferber and Piskie, 1965; Kalwani and Silk, 1982; Morwitz, Steekel and Gupta, 1996). Both Simonson (1993) and Bemmaor (1995) found that while intentions predict behaviour for existing consumer products, they do not predict behaviour for new products and products targeted to business markets. In the context of leisure travel, some decisions assume more importance than others. Put another way, many touristic consumption behaviours are neither essential nor mutually exclusive acts. After the consumer arrives at his or her destination, accommodation and meals are the only essential and unavoidable consumption activity. Every other planned activity is, arguably, expendable.

Secondly, time is a critical variable. Buehler, Griffin and Ross (1994) found that, in general, people have a systematic tendency to underestimate their own completion times, a phenomenon they label “planning fallacy”. Applying this argument to a travel setting, it could be argued that consumers plan to do more than they can actually complete within the time constraints of a trip away from home. However, the evidence here refutes this logic. People engage in more activities and visit more attractions than they had planned. Thirdly, Gross (1994) argues that responses to time pressures are contingent upon the degree of intensity of “objective” time pressure (clock and calendar time) and “subjective” time pressure (perceived urgency in response to the objective pressures of clock or calendar deadlines). Subjective time pressures may have also an influence on consumers, who are cautious in expressing intentions in an entry survey. Read and Loewenstein (1995) argue that consumers compress future time intervals when making combined choices and hence overestimate the effect of satiation. It is not until the individual enters the destination does he or she realise that activities will take less time than initially envisaged. This factor could help explain the low levels of intended activity reported prior to entry.

Fourthly, Shapiro and Krishnan (1999) remind us that consumers often forget intentions. They argue that marketing models used to forecast sales should incorporate memory as a variable to explain why some intentions do not lead to purchases. They also point out the complexity of memory processes (see also Krishnan and Shapiro, 1999). Fifthly, the timing of the intercept survey may have influenced the nature of the responses. Wright & Weitz (1977) found that when the outcomes of a choice were to be experienced in the near future, subjects were more averse to risk than in the more distant point in time. This finding may suggest that respondents were more conservative in their reported intentions in this survey than if they had been surveyed some days or weeks prior to entry.

Seventhly, Weick (1998) suggests that behaviour is not goal-directed but goal-interpreted. People are more comfortable and better able to describe what they did rather than what they plan to do. If we apply this view of human behaviour to this project, two conclusions can be drawn. First, reports by individuals of their consumption behaviours immediately upon leaving the consumption space are likely to be fuller and more detailed than reports of their intentions immediately prior to entry. Secondly, and as a consequence of the first point, we should not only expect “gaps” between planned and reported behaviours, but also be extremely cautious in drawing lessons at all about so-called “planned” behaviours.

Intriguingly, only seven percent of respondents in the exit actually reported spending “over budget”. Two equally powerful explanations can be presented for this response. We can accept Weick’s view of behaviour and conclude that the great majority of respondents in the entry survey had little idea of their spending strategy for the impending duration on Prince Edward Island. Or we could accept the more widely held view of behaviour that the low figure of seven per cent reflects the desire of survey respondents to appear rational in their consumption behaviour.

Tests of the competing theoretical propositions as to why planned behaviours are often less than realised behaviours need to be examined in future research. This study focuses on probing the extent of the differences between planned and realised, not on providing a "critical test" as to the efficacy of the multiple rationales found in the literature regarding such differences. In conclusion, we can only concur with the findings of Young, DeSarbo and Morwitz (1998:189): '[I]ntentions appear to almost always provide biased measures of purchase propensity, sometimes underestimating actual purchasing and other times overestimating actual purchasing' (1998:189).

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Chapter 10

Lifestyle Segmentation, Vacation Types and Guest Satisfaction

The Case of Alpine Skiing Tourism

By Kurt Matzler, Gerald Hattenberger, Harald Pechlaner and Dagmar Abfalter

Abstract

The influence of lifestyle on guest satisfaction was the focus of this study. According to the observed changes in our society, the tourism market, being already characterised through its heterogeneity, is showing increasing personalisation in consumer behaviour. Drawing from a sample of 1,042 German speaking skiing tourists to ten skiing resorts in Tyrol/Austria and South Tyrol/Italy, the results provide a valuable insight into possible market segmentation among these tourists. Using lifestyle characteristics, seven lifestyle and five vacation style typologies could be identified. The analysis reveals that satisfaction, word-of-mouth and the intention to revisit a destination are significantly influenced by guest lifestyles.

Introduction

The market is not a homogeneous mass of buyers, but consists of individual consumers, each with unique needs, wants and desires. This also applies to the tourism market. Goods and services can no longer be produced without considering consumer needs and recognizing the heterogeneity of those needs (Wedel and Kamakura 1998:3).

Market Segmentation

Market segmentation is an important part of a firm’s strategic marketing planning (Nylor and Kleiser, 2002). Together with positioning and targeting, market segmentation forms the foundation of the strategic management concept (Kotler and Scheff 1997:93). This concept enables marketers to spot new opportunities in the market and better serve the customers’ needs and wants. In market segmentation, a heterogeneous market is viewed as a number of smaller homogeneous markets, in response to differing preferences, attributable to the desires of consumers for more precise satisfaction of their varying wants (Smith, 1956). McDonald and Dunbar (1995:10) state that market segmentation ‘is the process of splitting customers into different groups, or segments, within which customers with similar characteristics have similar needs. By doing this, each one can be targeted and reached with a distinct marketing mix.’ The overall objective of using a market segmentation strategy is to improve the company’s competitive position and to better serve the needs of the customers (Weinstein 1987:10). Nevertheless, some of the limitations of market segmentation include the provision of composite profiles of a group as well as the assumption of homogeneity within a segment, the assumption of competition free segments and the descriptive nature of market segmentation (Weinstein, 1987:12–13; Gibson, 2001:22–24).

Different preferences for product benefits, consumer interaction effects, choice barriers, bargaining power and differences in customer profitability to the firm are basic customer differences that should be considered for market segmentation (Bock & Uncles, 2002). The segmentation model requires the selection of a basis for segmentation (a dependent variable), as well as descriptors (independent variable(s)). The segmentation base is used in order to assign potential customers to homogenous groups. Segmentation bases can be classified into (1) general bases, which are independent of products and purchasing situations, and (2) product specific bases, which are related to both the customer and the product, service and/or particular circumstances. Furthermore it can be distinguished whether the bases are observable (i.e. measured directly) or unobservable (i.e. inferred) (Wedel and Kamakura 1998:7). A segmentation base usually consists of a single or a group of variables and can be classified into four groups: geographic, geodemographic, demographic and behaviour. Further variables providing a more detailed description of the segment can be used as descriptors. Requirements for effective segmentation include identifiability, substantiality, accessibility, stability, responsiveness and actionability. Segmentation methods can be further classified into a-priori approaches where the number of segments is determined before data collection and post-hoc segmentation (Wedel and Kamakura 1998:4–5). Another classification relates to whether descriptive or predictive statistical methods are used.

The Lifestyle Concept

The concept of lifestyle can be traced back to the sixteenth century and was first intensely researched by the psychologist Alfred Adler in the 1960s. Adler stressed the uniqueness of the individual but also recognized similarities among individuals and their lifestyles. Still, there is no general agreement on the definition of "psychographics" or "lifestyles" in literature. The definition of lifestyle used in this paper is the one suggested by Engel and Blackwell (1982:188) who define lifestyles as '... the patterns in which people live and spend money', and see psychographics as the principal technique used by consumer researchers as an operational measure of lifestyle.

In 1964, Lazer introduced the lifestyle concept to marketing and consumer research. Since then researchers have been developing instruments to measure consumers on different variables, trying to group individuals into lifestyle segments. Lifestyle has an impact on a wide range of everyday consumer behaviour such as choosing a vacation destination or activities during a vacation and can therefore be a valuable segmentation base. Different segmentation concepts include (1) the *Activities, Interests and Opinion (AIO) method* (Wells and Tigert, 1971), (2) the *Values and Lifestyles (VALS and VALS2) Survey*, (3) *Rokeach's Value Survey,* (4) the *List of Values (LOV)* and (5) the *Eurostyle Concept.*

The *Activities, Interests and Opinion (AIO) method* uses two basic types of statements for lifestyle research – general lifestyle items and items that measure product related activities, interests and opinions (Wedel and Kamakura, 1998). The *Values and Lifestyles Attitudes Scales (VALS and VALS2)* have been created as generalised segmentation schemes drawing from Maslow's hierarchy of needs and the concept of social character (SRI Consulting Business Intelligence, 2003). The VALS typology classified the American population into four general consumer groups based on their self-images, their aspirations, values and beliefs, and the products they use.

VALS2 defines lifestyle segments along two constructs: self-orientation and resources. *Rokeach's Value Survey* (Rokeach, 1973:48) is based on values rather than activities, interests and opinions. Rokeach identified two main types of values: 18 terminal values, '… beliefs or conceptions about ultimate goals or desirable end states of existence …' and 18 instrumental values, '… beliefs or conceptions about desirable modes of behavior that are instrumental to attainment of desirable end-states'. The *List of Values (LOV)* reduces Rockeach's values to nine terminal values that are primarily person orientated, more directly related to a person's daily life roles and situations (Kahle, Beatty and Homer, 1986:406). The *Eurostyle Concept* has been developed by the Centre of Communication Advance (CCA) and measures respondents on five principal dimensions of lifestyle, namely objective personal criteria, behavioural attributes, attitudes, motivations and aspirations, sensitivities and emotions.

These concepts can be used either as segmentation bases or as descriptors of segments identified by other bases. Either way, they provide a rich description of market segments, and a life-like picture of consumers.

Lifestyle Segmentation in Travel and Tourism

The "new tourist" does not want to consume mass standardised holidays but is looking for a customized travel experience (Poon, 1993). The lifestyles of individuals have changed, they are more independent, are keen to learn something new and to broaden their horizon. Therefore, a very detailed knowledge of the traveller is required in order to fulfill his specific needs. Heath and Wall (1992:95) note that '…the rapidly changing nature of society makes it impossible to rely solely on demographic data as a means of plotting marketing strategy. Therefore, researchers have made increasing use of psychographic variables. Psychographic variables, including values, attitudes, opinions and interests are revealing more meaningful information about tourists' behaviour (Cha, McCleary and Uysal, 1995:38). Benefits of psychographic research in travel and tourism can apply for destination development, product or destination positioning, the development of supporting services, advertising and promotion, packaging and master planning (Plog, 1994:210).

Tourist typologies enable national and regional tourism organisations to investigate which market segments might be of special interest to them. Typologies also offer descriptions of the tourist types, thus enabling tourism organisations to design their products and services to satisfy the needs of the targeted segment. Lifestyle types differ in the expectations they bear towards a certain offer. Therefore the results of this study are expected to show that customer satisfaction, word-of-mouth and attribute importance should differ between the lifestyle segments.

Purpose of the Study

Travel and tourism have become a global industry with more than 690 million people travelling in 2001 (World Tourism Organization, 2002). Marketing tourist destinations and their products is becoming a widely recognised practise for both public and private sector organisations. Austria and Italy are very popular vacation places. According to the World Tourism Organization (2002) Italy ranks 4th on the World's Top 15 Tourism Destinations, Austria holds the 10th position. Although Austria and South Tyrol used to be typical summer destinations, winter tourism has gained importance in the last 20 years (see Table 1). The Tyrol is Austria's most frequented area, followed by Salzburg. Both, Tyrol and South-Tyrol are mostly visited by German as well as Austrian and Italian tourists.

Table 1
Overnight stays summer and winter season 2000/01.

Austria		South Tyrol	
Summer	Winter	Summer	Winter
59.645.098	55.270.892	15.268.754	9.325.285

Source: Statistik Austria 2001; Landesinstitut für Statistik 2002

Using lifestyle (AIO statements) as a segmentation basis for the Tyrolean and South-Tyrolean winter skiing market, the study aims at finding answers to three research questions. First, do lifestyle and vacation styles interrelate so that specific vacation styles can be clearly assigned to certain lifestyles? Second, do guest satisfaction, word-of-mouth and intended revisits depend on the guest's lifestyle? Finally, does lifestyle influence the importance of single satisfaction drivers for a destination? According to these questions the following hypotheses have been formulated:

> **Hypothesis 1:** "There is a direct relationship between the lifestyle of individuals and the vacation style of individuals. Each vacation style can be clearly assigned to a lifestyle."
>
> **Hypothesis 2:** "Guest satisfaction, word-of-mouth and the intention to revisit a destination depend on lifestyles."
>
> **Hypothesis 3:** "The importance of single destination attributes depends on the lifestyle of the guests."

Method of the Study

A sample of German speaking skiing tourists in ten different skiing resorts in Tyrol, Austria and South Tyrol, Italy was randomly selected in order to identify and validate the market segments. The survey was conducted using a self-administered questionnaire. The Austrian destinations included Axamer Lizum, Ischgl, Kitzbühel, Kühtai, St. Anton, and in Italy the skiing destinations included Gitschberg, Kronplatz, Raschings and Schöneben. Data collection was carried out in March and April 2003. The population of the study was defined as all German-speaking winter tourists above 15 years of age, who were present in one of the above mentioned destinations. All leisure trips including daytrips were covered. Residents of the respective destinations were not included in the study. The total sample size was 1,042.

In order to overcome the main problems encountered with questionnaires including lifestyle items, the length of the questionnaire, and the validity of the statements, an already tested and approved set of statements has been applied. After an extensive literature review the items of Gruner & Jahr (1998) as described by Zins (1993) were taken and adopted. In order to measure travel motives the instrument developed by the Europäisches Tourismus Institut GmbH (European Tourism Institute) at the University of Trier was taken and adopted to fit winter tourism. The questions about activities and tourist satisfaction were taken and adopted from the Austrian National Guest Survey. Thus, a first section dealt with questions concerning the trip and the guest's satisfaction, followed by a second section asking guests to describe their lifestyles and their vacation motives. Then, the questionnaire investigated activities during the winter vacation. A fourth section dealt with the guest's satisfaction with his/her vacation and the relation between price and value. Finally, demographic variables were collected.

Data analysis for this research involved three steps. First, factor analysis was employed on the lifestyle and vacation style statements in order to reduce the number of observed variables to a smaller set of underlying factors. The result provides (1) a small set of factors allowing identifying lifestyle and vacation style groups (typologies), and (2) a basis for subsequent research. Second, the data obtained from factor analysis was used as a basis for cluster analysis. To compare objects and group them into clusters the results gained from factor analysis were used as similarity measure. Where factor analysis enables the development of a number of groups, cluster analysis permits the allocation of respondents to specific categories (Ryan, 1995:268). In this study a combination of hierarchical and non-hierarchical methods was used. The hierarchical method was performed first in order to determine the number of clusters, followed by a non-hierarchical method used to improve the cluster membership. Finally, correlation analysis was used for the purpose of assessing attribute importance for overall satisfaction. As a result, attribute importance per segment should be identifiable.

Results of the Survey

Factor Analysis

Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett-Test of Sphericity were used in order to check suitability of the lifestyle– and vacation style–variables for factor analysis. As the results proved to be satisfying (see Table 2), factor analysis was carried out using a principal component extraction method with varimax rotation (Table 3). The initial 24 lifestyle-items could be reduced to seven underlying factors. The rotation converged in 12 iterations, 57% of total variance was explained. Two factors loading heavily on two or more factors have been removed. The result shows, that the remaining 22 variables are assigned to seven distinctive factors. Thus, seven distinctive groups of skiing tourists can be identified according to their lifestyles (Table 4).

Table 2

KMO- and Bartlett-Test for lifestyle and vacation style.

Lifestyle

Kaiser-Meyer-Olkin measure of sampling adequacy		**,725**
Bartlett-Test of Sphericity	Approx. chi-square	3971,171
	df	231
	Significance level	,000

Vacation Style

Kaiser-Meyer-Olkin measure of sampling adequacy		**,709**
Bartlett-Test of Sphericity	Approx. chi-square	2034,660
	df	91
	Significance level	,000

Table 3

Rotated component Matrix.

	Component						
	1	**2**	**3**	**4**	**5**	**6**	**7**
I enjoy my life as much as I can.	,764						
I go out a lot.	,691						
I live a life of constant change.	,684						
I like travelling.	,572						
I live a frugal life.		,741					
I live a contemplative life.		,677					
I am repairing things and work manually in my spare time.		,491					
I work above average.			,795				
My work is fulfilling			,693				
I am on business trips a lot.			,562				
All I live for is my family.				,750			
I live my life according to my desires (recoded).				,643			
I live my life on a straight and narrow path.				,500			
I am politically active.					,698		
I do meditative exercises.					,633		
I help people who are in need.					,523		
I read a lot for entertainment/relaxation.						,830	
I read a lot to further my education, to broaden my knowledge.						,629	
I actively seek out cultural events.						,500	
I live a healthy life.							,790
I act environment friendly.							,584
I work out regularly/do sports regularly.							,580

Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalisation.

a Rotation converged in 12 iterations.

Total Variance Explained: 57,001%

Table 4

Factor labels lifestyle.

Factor 1	Pleasure seeker
Factor 2	Inconspicuous person
Factor 3	Hard working, ambitious, career-person
Factor 4	Family person
Factor 5	Committed helper person
Factor 6	Culture, intellectual person
Factor 7	Environment- and health- conscious person

The same procedure was applied for the set of vacation style variables. The initial 14 vacation style variables are assigned to five underlying groups, identifying five distinctive vacation styles (Table 6). The rotation converged in nine iterations, 57% of total variance was explained (Table 5).

Table 5

Table rotated component matrix.

	Component				
	1	2	3	4	5
On winter vacation I am looking primarily for fun and entertainment.	,746				
It is important to have certain events at the winter destination where I can get to know people.	,685				
When I am on winter vacation I do not want to care about anything.	,581				
On winter vacation I do not care about money.	,542				
I need a winter vacation to gain new strength for my work.		,821			
On winter vacation I enjoy nature.		,748			
On winter vacation I usually go to foreign countries.			,731		
On a winter vacation I want a change from my usual surroundings.			,722		
On a winter vacation culture and sights are important.			,634		
I do not mind staying at home for winter vacation and care about things I usually do not have time to.				,750	
I have difficulties in finding the right destination for a winter vacation as there are too many choices.				,673	
When choosing a winter vacation destination I strongly consider the needs of my child/children.				,425	
I want to push my limits and to get physically exhausted when I am on winter vacation.					,854
I am looking for a variety of leisure time and sports activities in a skiing destination.					,510

Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalisation.

a Rotation converged in 9 iterations.

Total Variance Explained: 58,699 %

Table 6

Factor labels vacation style.

Factor 1	Pleasure vacation
Factor 2	Regeneration, relaxation vacation
Factor 3	Culture, new experiences vacation
Factor 4	Not keen on winter vacation
Factor 5	Sports vacation

Cluster Analysis

A hierarchical cluster analysis (Centroid Method) with a 5% probability sample of all cases was used to derive the number of clusters. Seven lifestyle clusters and five vacation type clusters could be identified. Then Quick Cluster (k-means cluster) was used on the entire sample to allocate respondents to the clusters. The seven cluster solution for lifestyle and the five cluster solution for vacation style were judged to be the most reasonable, giving acceptable cluster sizes and a consistent interpretation.

Correlation Analysis

The importance of attributes for overall customer satisfaction can be measured either through stated or derived importance (e.g. Oliver, 1997; Chu, 2002; Matzler and Sauerwein, 2002). Matzler and Sauerwein (2002) argue that self-stated importance weights are not reliable measures for the relative importance of quality attributes and suggest that empirically derived importance weights be used. In this study therefore, attribute-level satisfaction is correlated with overall satisfaction with the destination in order to measure the importance of the attributes. Satisfaction attributes were taken and adopted from the Austrian National Guest Survey. The impact of overall satisfaction with the destination was measured using regression analysis with overall satisfaction as the independent, and likelihood of recommendation to others and likelihood to revisit the destination as dependent variables. A strong and significant relationship between the variables could be found (Table 7, see also Table 10).

Table 7

Attribute importance.

Attribute	Correlation coefficient
Landscape	0,317**
Cityscape	0,405**
Peacefulness of destination	0,280**
Comfort of the accommodation	0,296**
Gastronomic quality	0,350**
Art and culture	0,190**
Entertainment	0,299**
Shopping	0,295**
Bad weather program	0,276**
Ski resort	0,575**

Table 8 reports the respondents' overall satisfaction with the winter holiday, the intention to recommend it to others and the intention to revisit the destination.

Table 8

Overall satisfaction, word-of-mouth and intention to revisit.

	Mean	Standard Deviation
Overall satisfaction (1= very high, 2= very low)	1,63	0,58
Likelihood to recommend to others (1 = yes, for sure, 5 = not at all)	1,57	0,70
Likelihood to revisit (1 = yes, for sure, 5 = not at all)	1,67	0,79

The Lifestyle And Vacation Style Segments

After identifying the clusters and analysing the factor scores, each cluster was assigned a label describing the nature of the cluster (Table 9).

Table 9

Lifestyle segments.

Label	Key characteristics	Percentage
Cluster 1 "Pleasure Seeker"	S/he is enjoying life, likes going out and is living a life of constant change. S/he is working to earn a living, without putting too much effort into work.	12,2
Cluster 2 "Work-oriented"	S/he is committed to work, working longer hours and seeking fulfilment in his/her occupation. S/he is self centred rather than a family person.	13,9
Cluster 3 "Couch potato"	S/he is living a frugal life and not very active.	13,5
Cluster 4 "Family oriented"	S/he is committed to her/his family. S/he is living life on a straight and narrow path.	14,9
Cluster 5 "Committed helper"	S/he is socially and politically active and helping others.	13,7
Cluster 6 "The average"	S/he is inconspicuous and frugal. S/he is not very helpful and politically not active.	13,3
Cluster 7 "Culture interested"	S/he reads a lot to further education and is interested in culture (concerts, museums etc.). S/he is working to earn a living.	18,4

Table 10 shows the clusters formed of travel motives. These motives are used to explore the vacation style of the individuals and act as a further descriptor for the lifestyle segments.

Table 10
Vacation style segments.

Label	Key characteristics	Percentage
Cluster 1 "Enjoyment/ Hedonism"	action, fun, enjoyment, socialising, spending, no emphasis on sports and relaxation	17,9
Cluster 2 "Relaxation"	relaxation, gain new strength for work in unspoiled nature	20,5
Cluster 3 "Culture/Experiences	culture, foreign countries, sightseeing, not very interested in winter vacation	22,0
Cluster 4 "Active winter-vacation"	relaxation combined with sports activities	20,5
Cluster 5 "Sports vacation"	different sports activities, pushing the limits	19,0

As stated before, seven segments emerged from the analysis. The information available to describe each segment is extensive; hence a short characterisation for each cluster is presented. A summary of the lifestyle typologies and description is displayed in Table 11. The characterisation is split into two parts; the first part includes a description of lifestyle, vacation style, vacation activities and socio-demographics, whilst in the second part, data undermining the descriptions of the first part is presented.

Conclusions and Implications

Referring to the initially stated hypotheses the following results could be found:

A definite relationship between one lifestyle and one according vacation style cannot be found. Segments one, three, four and five show a clear preference for one of the five vacation styles. Hypothesis 1 is therefore valid for those segments. In segment two, two different vacation styles are predominant, whereas in segment six and seven all five vacation styles are equally distributed. For these cases, hypothesis 1 is not valid.

Regression analysis revealed a strong relationship between lifestyles and guest satisfaction, word-of-mouth and the intention to revisit a destination. Hypothesis 2 can therefore be supported and suggests closer consideration of guest lifestyles when creating and promoting tourist services.

Attribute-level satisfaction showed to be significantly correlated with the guest's overall satisfaction with the destination. Whereas the satisfaction drivers *ski resort* or c*ityscape* are important for all of the segments, the importance of attributes such as *shopping, entertainment* or *gastronomic quality* varies among the segments. Hypothesis 3 can therefore be supported.

Market segmentation is often used in order to identify the most attractive customers. This research shows that lifestyle segmentation can also help enhance customer satisfaction and thus maintain guests. Managerial implications from this study suggest that the promotional tools of vacation destinations should reflect the type of customers they want to attract or retain. Measuring customer satisfaction is not enough, it is important to examine which factors and benefits contribute to satisfaction and whether they differ across different lifestyle segments in order to customise service and experience for the guests and to create word-of-mouth as well as guest loyalty.

Table 11
Description of the lifestyles.

	Segment 1 "Pleasure seeker"	Segment 2 "Work oriented"	Segment 3 "Couch potato"	Segment 4 "Family oriented"	Segment 5 "Committed helper"	Segment 6 "The inconspicuous"	Segment 7 "Culture interested"
Lifestyle	enjoying life, fun, diversity,	fulfillment in occupation, self centred	no pleasure seeker, frugal	family is the centre of interest	socially and politically active and helping others	living a simple and frugal life	furthering knowledge, culture interested
Socio-demographics	15 to 24 years, single, high school and trainees	24 to 44 years, high education, self employed or executives	35 to 44 years major part, but also 44 and up, married with children	35 to 44 years, married with children, high education	55 to 65 years, all types of employment	24 to 35 years, low education, skilled worker and employees	15 to 24 and 55 to 64 years, students and pensioners
Winter vacation style	fun and entertainment	emphasis on sports and relaxation	relaxation, gain new strength	relaxation	cultural experience, staying at home	no clear preferred vacation style	no clear preferred vacation style
Vacation activities	going out, attending local events, skiing, snowboarding	skiing, snowboarding, saunas, eating out	skiing, going for walks	saunas, thermal spas, skiing, going for walks	cross country skiing, ski touring	not very active in general	going for walks, relaxing
Vacation intensity (vacation/short vacation)	1 vacation/ 2-3 short vacations	2-3 vacations/ 4 or more short vacations	1 vacation/ 1 short vacation	4 or more vacations/ 2-3 short vacations	2-3 vacations/ no short vacation	no vacation/ either no short vacation or 2-3 short vacations	2-3 vacations/ 1 short vacation
Tp five satisfaction drivers (R^2)	Ski resort (0,501**) Shopping (0,454**) Cityscape (0,407**) Entertainment (0,373**) Landscape (0,284**)	Ski resort (0,644**) Cityscape (0,437**) Bad weather program (0,388**) Comfort of accommodation (0,358**) Peacefulness of destination (0,343**)	Ski resort (0,601**) Cityscape (0,489**) Bad weather program (0,434**) Landscape (0,406**) Gastronomic quality (0,393**)	Ski resort (0,515**) Gastronomic quality (0,301**) Shopping (0,283**) Landscape (0,259**) Cityscape (0,223**)	Ski resort (0,518**) Comfort of accommodation (0,457**) Gastronomic quality (0,427**) Cityscape (0,398**) Bad weather program (0,396**)	Ski resort (0,668**) Cityscape (0,423**) Entertainment (0,404**) Bad weather program (0,312**) Landscape (0,294**)	Ski resort (0,511**) Cityscape (0,425**) Gastronomic quality (0,382**) Shopping (0,322**) Comfort of accommodation (0,313**)
Overall satisfaction (SD)	1,61 (0,579)	1,76 (0,619)	1,80 (0,567)	1,53 (0,538)	1,57 (0,525)	1,58 (0,685)	1,58 (0,537)
Likelihood of recommendation (SD)	1,54 (0,77)	1,60 (0,721)	1,76 (0,786)	1,50 (0,658)	1,53 (0,637)	1,52 (0,718)	1,56 (0,699)
Likelihood of revisit (SD)	1,65 (0,82)	1,76 (0,827)	1,85 (0,786)	1,57 (0,764)	1,58 (0,706)	1,60 (0,797)	1,69 (0,828)
Relationship between satisfaction and recommendation (R^2)	0,407**	0,480**	0,411**	0,288**	0,552**	0,540**	0,317**
Relationship between satisfaction and revisit (R^2)	0,414**	0,295**	0,282**	0,109**	0,388**	0,384**	0,186**

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Part 4

Hospitality Management

Chapter 11

An Investigation of Asset Specificity's Significance in Hotel Outsourcing Decisions

By Dawne Lamminmaki

Abstract

Williamson's (1985, 1988, 1991) six dimensional typology of asset specificity is used as a theoretical framework for considering observations of outsourcing practice made in the course of conducting interviews with fifteen managers in eleven large hotels. Site specificity and brand capital appear to be the most pertinent dimensions of asset specificity in the sample of hotels investigated. No observations relating to the physical asset specificity dimension of asset specificity were noted.

The over-riding conclusion of the study is that asset specificity represents an important construct that should be considered when attempting to understand hotel outsourcing decision making. It also provides a valuable context when considering the motivations of the two parties entering into a sub-contracting arrangement. Although most observations support the transaction cost economics (TCE) prescription that high asset specificity results in insourcing, two particular observations are described that appear to contradict this TCE theory.

Introduction

This paper describes a study concerned with appraising the nature and significance of asset specificity in hotel outsourcing decisions. Asset specificity is one of three transaction-related attributes central to the transaction cost economics (TCE) theorem (Williamson, 1979, 1985, 1996).[1] Use of this theoretical perspective signifies that the study can be seen as contributing to a growing stream of management accounting research informed by TCE (e.g., Jonsson and Gronlund, 1988; Demski and Sappington, 1993; Colbert and Spicer, 1995; Gietzmann, 1996; Widener and Selto, 1999; Speklé, 2001; and Vosselman, 2002). Asset specificity relates to the extent to which investment in assets (both physical and human) are specific to a particular trading relationship. An outline of the significance that TCE theorists see for asset specificity in the context of outsourcing decision making is provided in the next section.

The motivation for exploring asset specificity in the context of hotel outsourcing is twofold. Firstly, asset specificity has been widely used to explain the boundaries of the firm.[2] Williamson (1985) sees the significance of asset specificity to TCE theorising as difficult to exaggerate. This view appears to have widespread support in the theoretical and empirical literatures as asset specificity is the TCE attribute that appears to have attracted most research interest. Despite this, no study applying either the asset specificity notion or the broader TCE framework has been found in the hospitality

[1] The other two attributes, frequency and uncertainty, are not explored in this paper.

[2] Colbert and Spicer (1995) cite a breadth of studies that draw on asset specificity as part of an attempt to explain the boundaries of the firm, strategy, make or buy decisions, as well as vertical, horizontal and diversification decisions (Alchian, 1984; Alchian and Woodward, 1987; Jones and Hill, 1988; Klein, 1988; Levy, 1985; Masten, 1984; Masten et al, 1989; Monteverde and Teece, 1982; Reve, 1990; Riordan and Williamson, 1985; Teece, 1986; Walker and Weber, 1984; Williamson, 1991).

management literature. Secondly, there is a paucity of prior research concerned with outsourcing in the hotel sector.[3] This lack of research interest in hotel outsourcing is somewhat surprising, as outsourcing has become a significant facet of modern hotel management (Sieburgh, 1992; Rowe, 1994; Hottman and Adams, 1996; DeMicco and Williams, 1996).[4]

The remainder of the paper is structured as follows. The next section describes the nature of asset specificity and overviews prior empirical studies that have drawn on this particular framework in attempting to explain outsourcing behaviour. The study's research method is then described. This is followed by a section devoted to outlining the study's main findings, and then a concluding section that overviews the most significant findings emanating from the study.

Overview of Asset Specificity

Coase (1937) was the first to consider the question of what drives organisational form. The theoretical framework that he developed in response to this question has become widely-referred to as transaction cost economics (TCE). He developed the idea that 'economising on transaction costs would determine the organisation of economic activity, and the division of activity between firms and markets' (Milgrom and Roberts, 1992:51). The relevance of this idea to outsourcing underlines its pertinence to this study. Supporting this view, Lohtia et al (1994) note:

> 'Between the extremes of market and hierarchies, firms use a variety of hybrid governance mechanisms … Given the wide array of options from which a suitable governance structure needs to be selected, the guidance offered by the TCE framework is found very useful.' (p261).

Coase (1937) suggests that a firm will replace the market when the costs of transacting within the firm are less than the costs of transacting through the market. Williamson (1979) and Colbert and Spicer (1995) modified this notion slightly by proposing that economic activity will be conducted through whatever organisational form minimises the sum of production and transaction costs.

Coase (1937) recognised that in addition to production costs, a cost arises in connection with how transactions are organised within markets or organisations (hierarchies). While this appears intuitively appealing, definitions of transaction costs are surprisingly rare in the literature (Robins, 1987). Robins (1987) defines transaction costs as follows:

> 'In basic terms, transaction costs are those costs associated with an economic exchange that vary independent of the competitive market price of the goods or services exchanged.' (p69).

[3] In 1995 The International Journal of Contemporary Hospitality Management initiated an annual issue providing reviews of the hospitality research literature. Of these reviews (e.g., Teare, 1995; Ingram, 1995; Bowen, 1996; Blum, 1996; Teare, 1996; Ingram, 1996; Teare and Bowen, 1997; Costa et al, 1997), only one provides any reference to outsourcing (Prabhu, 1996). Prabhu's (1996) review briefly refers to Goldman and Eyster's (1992) study which considered hotel F&B leases.

[4] Further testimony of the significance of hotel outsourcing is apparent from Rowe's (1994) review of the Hyatt Hotel's 1993 comprehensive restructuring of hotel operations. An outcome of this restructuring was an increased proportion of jobs outsourced. Rowe sees this as the beginning of a trend that will see an increasing proportion of hotel activities outsourced.

For example, two hotels may purchase food products from the same supplier, but have different transaction costs due to different transportation distances and differences in the way their purchasing and receiving departments are organised.

The manner in which a transaction is organised depends on particular attributes of the transaction. Most TCE commentators (e.g., Williamson, 1979, 1985, 1996) discuss three critical transaction attributes: (i) asset specificity, (ii) uncertainty, and (iii) frequency. As noted above, the focus of this study is restricted to the asset specificity dimension of TCE.

Lohtia et al (1994) describe asset specificity as 'an asset, either tangible or intangible, that has little value outside of a particular relationship' (p261). Milgrom and Roberts (1992) note that when large asset specific investments are made, parties will organise themselves 'in ways that safeguard those investments' (p49). Where an asset is highly specific to a particular trading relationship, its value is determined by the continuance of the trading relationship since the asset has limited value in an alternative use. Palay (1984:277) remarks:

> '… the more specialised the investment, the lower its value in its next best use. This heightens the risk of opportunistic behaviour during both the performance and renegotiation of the contract.'

TCE holds that the greater the asset specificity, the more likely a transaction will be internally managed (i.e., not outsourced). However, asset specificity is fairly complex. Williamson (1985) notes six asset specificity dimensions. These are: human, physical, site, dedicated, brand capital, and temporal asset specificity. The dimensions comprising this typology of asset specificity have been used to structure this study's empirical findings. The nature of each dimension will now be considered in turn.

Human asset specificity

Lohtia et al (1994) feel that human asset specificity is the dimension of asset specificity that has received the most attention both conceptually and empirically. Human asset specificity encompasses any idiosyncratic knowledge or skill that an employee develops through training, and represents specialised know-how or experience specific to a particular employer/employee relationship, i.e., the knowledge or skill is not transferable as it has limited pertinence to other job situations. Related to this dimension of asset specificity, Deegan (1997) found some support for the view that degree of human asset specificity can have an effect on remuneration plans negotiated. Widener and Selto (1999) also drew on human asset specificity in their investigation of the outsourcing of internal audit services.

Physical asset specificity

This concerns investments in physical assets relating to a particular trading relationship. For example, Milgrom and Roberts (1992) refer to a wing producing facility investment made by a Boeing supplier. These wings are specific to a particular Boeing plane and therefore the relatively specialised investment made would be of limited value in other wing trading relationships.

Site specificity

This relates to an investment made in a site that is in close proximity to a buyer or seller. In many cases, such investments are made in order to facilitate a particular trading relationship. For example, in the automobile industry suppliers have established factories sufficiently close to the car manufacturers' assembly plants to enable movement of components by conveyor belt from the component manufacturing site, direct to the car assembly plant. In the case of site specificity, it might be that the asset in question meets the technological requirements of other potential trading relationships. However, it is the location of the asset that gives rise to site specificity. If the asset in question would have to be moved to serve other trading relationships, and the costs of relocation are prohibitively high, site specificity is present. In the context of hotel management, site specificity can be seen to arise with respect to laundry equipment and custom made restaurant fitting investments.

Dedicated asset specificity

This relates to a general purpose asset, as opposed to a specialised asset, that has been purchased in connection with a specific long-term contract trading relationship. Should the long-term contract relationship expire, excess capacity will result. For example, a hotel might expand its facilities on the assumption that delegates from a neighbouring conference venue will use its facilities.

Brand capital

This can be seen as closely associated with reputation investment (Lohtia et al, 1994). Contractual problems can arise when one party has control over activities that can result in damage occurring to the brand reputation of a second party. For this reason, TCE theory holds that an activity will tend not to be outsourced if it were to result in a sub-contractor being placed in a position enabling it to (wittingly or otherwise) inflict damage on the reputation of the hotel's business.

Temporal specificity

This concerns asset investment where timing and coordination of activities is critical, i.e., timing and coordination represent the specific asset. Masten et al (1991) and Lohtia et al (1994) use ship building as a context for elaborating on this form of asset specificity. If all activities necessary for completion of a ship have been coordinated and scheduled, failure to achieve timely delivery of one (albeit potentially cheap) item that is required for the ship could be costly to the ship manufacturer. Although an alternative supplier of the part might exist, if procurement of the part from the alternative supplier results in a delay to the ship's manufacture, temporal specificity is said to exist. In this scenario, the ship builder is exposed to the possibility of "strategic hold-ups". Masten et al (1991) comment:

> 'Even though the skills and assets necessary to perform the task may be fairly common, the difficulty of identifying and arranging to have an alternative supplier in place on short notice introduces the prospect of strategic holdups' (p9).

For hotels, temporal specificity would appear to be present when outsourcing laundry, cleaning or pre-prepared food ingredients.

Prior empirical work that draws on asset specificity

There appears to be a growing body of TCE empirical research that draws on the asset specificity framework to understand organisational structure. Significant studies include the work of Monteverde and Teece (1982), Palay (1984), Deegan (1997), Widener and Selto (1999) and Nickerson et al (2001).

In a study conducted in the US automobile industry, Monteverde and Teece (1982) found support for their hypothesis that vertical integration will be adopted when the production process requires specialised know-how and high physical asset specificity. Palay (1984) conducted a study of the nature of trading relationships between rail freight carriers (railroads) and shipping companies. He reported that the range of governance mechanisms used in conjunction with investments could be explained largely by their respective degrees of asset specificity.

As noted above, Deegan (1997) conducted a study designed to investigate for a relationship between a manager's expertise specificity and the design of remuneration contracts. From his quantitative analysis, Deegan provided statistically significant support for all but one of his TCE motivated hypotheses.

Widener and Selto (1999) employed a survey questionnaire and archival data from 600 large publicly traded US firms to appraise TCE and competitive strategy as factors affecting the outsourcing of internal audit activities. Although the model used by Widener and Selto was not restricted to the asset specificity dimension of TCE, they found asset specificity to be the most significant factor explaining internal audit outsourcing. Consistent with Widener and Selto, Nickerson et al (2001) drew on TCE in combination with strategy to explain outsourcing of international courier and small package services in Japan. The main TCE aspects they appraised concerned temporal and physical asset specificity. While support was provided for the study's propositions, the small sample size used compromises the validity of the study's findings.

Research Method

The role of asset specificity in hotel outsourcing has been appraised through the conduct of fifteen interviews with managers representing eleven large South East Queensland (Australia) hotels.[5] Nine interviewees were financial controllers, three were general managers, two were Food and Beverage (F&B) managers, and one was a project engineer. An overview of the interviewees and the hotels they represent is provided in Table 1. The first column of the Table outlines the referencing system used to identify each interviewee. This coding scheme has been drawn upon in the following section when citing a specific interviewee's comments. Interviews were conducted with more than one interviewee in Hotels 1 and 5. These interviewees have been differentiated by using an abbreviation of their title, eg., "FC" (Financial Controller).

Most interviewees had more than ten years experience in the hotel industry. As a result, they frequently drew on observations made throughout their career, rather than just experience gained with their current employer. The selection of interviewees drawn from a relatively small geographic area enhanced the reliability of data collected. This is because many interviewees commented on outsourcing issues arising in hotels where other interviews were being conducted. A high degree of networking between General Managers (GMs) and Financial Controllers (FCs) in competing hotels was apparent. This facilitated a richer understanding of the dynamics at play in the commercial context of a particular industrial sub-sector defined by its locality. One could in fact argue that the study constitutes a small industrial case study where the case under investigation is hotel outsourcing management in the Gold Coast.

[5] Ten hotels are in the Gold Coast, one is in Brisbane.

Table 1
List of Hotel Interviewees

Interviewee Code[a]	Position of Interviewee	Owners of hotel	Management company of hotel	Number of restaurants	Number of Rooms	Number of Stars (RACQ rating)
1-FCa[b]	Financial Controller	Domestic publicly traded company	Overseas publicly traded company	6	609	5
1-FCb	Financial Controller					
1-FB	F&B Manager					
1-PE	Projects Manager					
2	Financial Controller	Domestic publicly traded company	Overseas publicly traded company	5	134	5
3	General Manager	Overseas publicly traded company	Overseas publicly traded company	2	298	4-1/2
4	F&B Manager	Privately owned	Large international company	3	350	5
5-FC	Financial Controller	Overseas publicly traded company	Run by owner (Wholly owned subsidiary)	6	330	5
5-GM	General Manager					
6	Financial Controller	Large overseas publicly traded company	Run by owner	3	300	5
7	Financial Controller	Hotel part of chain - hotels in chain are owned by different owners	Overseas publicly traded company	1	302	4-1/2
8	General Manager	Owned 50/50 by an overseas company and an Australian company	Both owners are also managers.	1	405	5
9	Financial Controller	Two owners, a small overseas company and small domestic company	Run by the overseas owner	2	403	4-1/2
10	Financial Controller	Small domestic company	Run by owner (Subsidiary of owning company)	3	205	6
11	Financial Controller	Large overseas publicly traded company	Large overseas publicly traded company	1	405	4-1/2

[a] Multiple interviewees from one hotel have been differentiated by an abbreviation of their title (eg., FC: Financial controller, GM: General Manager).

[b] This hotel provided two Financial Controllers (FC-a and FC-b). FC-a was a University contact who gave a 2.5 hour interview shortly after leaving the hotel.

Although a schedule of interview questions was developed, a flexible approach to interviewing was taken. The course of the typical interview was as follows. Following some introductory remarks that described the study's focus on outsourcing, interviewees were invited to talk in general terms about their hotel's degree of outsourcing and approach to outsourcing. At this stage, the interviewees were not prompted about asset specificity. Depending on what course the interview took, probes relating to asset specificity and other theoretical constructs were introduced by the interviewer later in the interview. With the exception of the first interview, all interviews were tape-recorded and varied in length from one to two and a half hours.

The first interview was granted by the project manager of hotel 1. This interview was conducted in the context of a personalised tour of hotel 1. This proved to be a useful initial stage in the empirical inquiry as it heightened the researcher's appreciation of the physical infrastructure and working environment relating to the potential for asset specificity in hotels.

Field Study Findings

Williamson's (1985, 1988, 1991) typology of asset specificity dimensions described above has proven to be a useful structuring mechanism for presenting the field study observations made. For some observations, it appeared the issue in question related to more than one of Williamson's asset specificity categories. In these cases, the observation has been discussed under a specific heading that refers to two asset specificity dimensions.

As will be noted below, physical asset specificity has not been used as a heading, as no observations relating to physical asset specificity have been noted. This failure to make observations relating to physical asset specificity might merely be seen as a reflection of the hotel industry's service oriented and labour intensive nature.

Site specificity

As noted above, site specificity is present where a subcontractor would incur prohibitively high transportation costs shipping to an alternate customer, or the cost of relocating the asset in question is high. Much of a hotel's activity relates to the provision of services, therefore, transportation is frequently not a major issue. Accordingly, with respect to hotels, it appears that the prohibitively high nature of removal costs associated with relocating an asset is the key issue that can give rise to site specificity.

Several observations relating to site specificity were made in the field study. Although no interviewees used the term "asset" or "site specificity", several managers appeared to have an intuitive grasp of the concept as comments made indicated that they appreciated how site specificity can be used as a mechanism to secure a subcontractor's commitment to a trading relationship.

Site specificity was most evident in connection with the management of hotel shops. There appeared to be a widely-held perception that shop retail was not core to a hotel's set of activities and that it fell outside the span of expertise aspired to by most hotel managers. Hotels 1, 7, 8, 9 and 10 outsourced their shop management. Particular site specificity was evident in the case of hotels 1, 8, 9 and 10, as in these businesses the subcontractor had been required to pay for all shop refurbishments. Requiring the subcontractor to pay for initial shop refurbishment can be seen as a strategy to ensure shop sub-contractor commitment to the trading relationship. This is because if the shop sub-contracting relationship were to cease, it is unlikely that the subcontractor would be able to recoup much of the capital expended on refurbishment. In addition to motivating commitment to the relationship, requiring a significant site-specific investment can also be seen to represent a strategy designed to promote a quality service provided by the sub-contractor. Again, this incentive results from the size of the investment loss that would result from the shop sub-contactor's business failing.

Site specificity was also apparent with respect to the management of a disco in Hotel 8. The Hotel's GM indicated that he did not want hotel staff to manage the disco due to late night management issues that can arise. It was desirable that the disco had separate entrances from the hotel so that disco guests, disco staff, and deliveries of disco supplies did not have to pass through the hotel main lobby area. The GM explained that this necessitated an investment of around a hundred thousand dollars. The GM required the disco operator to finance this investment, and acknowledged it as a strategy designed to secure commitment to the relationship from the disco operator. The hotel extended a five year contract to the disco operator. The length of this negotiated contract appears consistent with the TCE model. In order to protect the hotel's interest, an asset specific investment was made by the subcontractor, and to protect the subcontractor's interest, a long contract was drawn up. The GM viewed the arrangement as a "win-win situation" benefiting both parties.

Site specificity also appears to have been used to gain subcontractor commitment in several hotel restaurant outsourcing arrangements noted. Restaurant management was outsourced in hotels 9 and 10, and in both cases the hotel required the subcontractor to finance initial refurbishment costs. This again signifies that if the restaurant fails, the restaurateur would have lost the refurbishment investment. An alternative approach was taken in hotel 1, however, which outsourced the management of a themed Asian restaurant. It was noted that the hotel had preferred to finance the investment so that the subcontractor did not feel exposed, and because the hotel could fit it out for less cost. In this case, the hotel did not feel particularly exposed, as the restaurant subcontracting company was well established and had a strong brand name to protect. FCb in this hotel commented:

> 'If you say … come in and you will need to furnish the kitchen, and your capital investment is $7 million dollars, they would feel very uncomfortable. But if you say, no, you tell us what you want and we will put it in. Because we want a restaurant in there anyway, and indeed with our contacts it would be cheaper for us … All we want is your managerial experience. You wheel in the people. … You need to make sure that it is attractive to them.'

It appears likely that the particular way in which commerce is conducted in hotels results in site specificity being a significant issue. Unlike most trading situations, customer interaction and customer consumption in hotels occurs at the site of the service provider. This signifies that any subcontracted activities that are closely related to service provision have to be located on the hotel's site (e.g., shop, restaurant, disco). From the findings noted above, it appears that the presence of site specificity is widely used by hotels as a means to gain commitment from sub-contractors. The need for this commitment would appear to be particularly significant in this industry – if the subcontracted service is poorly delivered, or assets poorly maintained, the hotel's image may suffer (an issue relating to brand capital specificity).

Several other examples of site specificity were noted in the interviews, however, as these also relate to dedicated asset specificity, they are discussed under the following heading, which refers to both site and dedicated asset specificity.

Site specificity and dedicated asset specificity

As noted earlier, dedicated asset specificity relates to a general purpose asset that has been purchased in connection with a particular trading relationship. If the relationship ceases, excess capacity will result. Three examples of dedicated asset specific investments were noted: in-house entertainment, the provision of safes, and laundry chemical dispensers. All three of these dedicated asset specificity examples can also be seen to give rise to site specificity.

Subcontracting the provision of in-house movie entertainment appears to signify both dedicated asset and site specificity. At the time of interviewing, hotel 6 had been outsourcing the provision of in-house movies to the same supplier for more than eight years. This supplier was pushing to introduce new technology, but was unwilling to do so without the protection of a seven year contract with the hotel. This situation highlights the presence of site specificity, due to the considerable proportion of installation costs that would be sacrificed if the equipment had to be dismantled. It also signifies the presence of dedicated asset specificity, as the cessation of the in-house entertainment contract could leave the sub-contractor with excess capacity. In hotel 6, every time the in-house entertainment provider added a new technological feature, it tried to protect its interests by increasing the length of the contract. The hotel, however, did not wish to enter into a long contract. This reluctance stemmed from the perceived speed of technological innovation occurring in in-house entertainment. The FC interviewed commented on how a fear of technological obsolescence was preventing the hotel's management committing itself to any long-term contract. This uneasy situation had resulted in a month-by-month arrangement with the supplier. This arrangement should not be viewed as typical for the industry, however. For example, hotel 5 had entered into a 5 year contract with its in-house entertainment provider.

A second site/dedicated asset specific example was noted in hotel 11 in connection with the provision of safes. In this hotel, a specialist safe company owned the safes and a commission was paid to the hotel based on safe usage. Because the company providing the safes had to make a significant investment installing the safes into the hotel's rooms, a five year contract had been negotiated. The FC in hotel 11 felt this to be reasonable as the safe company had made a relatively site specific investment of around $1.5 million dollars. Avoidance of capital expenditure on the part of the hotel appeared to be the main reason for outsourcing this activity. Again, it appears site specific asset investment was used as an opportunity to gain commitment from the supplier. Dedicated asset specificity also appears to be present in this situation as cancellation of the contract would likely result in excess capacity for the subcontractor.

A third example of a combination of site and dedicated asset specificity was noted in hotel 1 in connection with arrangements undertaken for the provision of laundry chemicals. This hotel had its own laundry facility and its supplier of chemicals had made an on-site investment of approximately $35,000 in chemical dispensing equipment. In light of this investment, the subcontractor was attempting to negotiate a longer contract. FC(b) acknowledged that it was reasonable for the sub-contractor to expect an extended contract and commented that:

> 'At the end of the day you have to say, "Are we being reasonable in what we are asking our supplier to do?" I would not ask them to do anything that I would not ask myself to do, as a supplier. And that is what a business relationship is all about; you have to be reasonable.'

It was unclear why hotel 1 had not born the cost of the chemical dispensing equipment, although it may relate to the chemical supplier's specialisation in this field. In light of the arrangement entered into, it appears the supplier had made an investment that was both site and dedicated asset specific. The FC indicated a willingness to enter into a long-term contract with this supplier which appears consistent with the degree of commitment demonstrated by the chemical supplier. This might well be a case where the supplying company financed a relatively asset specific investment in order to enhance its likelihood of securing a long-term contract.

Dedicated asset specificity

Only one observation was noted that related exclusively to dedicated asset specificity. This concerned the provision of indoor plants placed in front of house common areas. Hotel 9 outsourced the ownership and maintenance of indoor plants. In this relationship, the subcontractor owned, maintained and replaced the plants as necessary. Although this is an example where the subcontractor's investment is physically located on the hotel site, it does not appear to constitute high site specificity, as the removal costs for the indoor plants would not appear to be prohibitively high. However, dedicated asset specificity does appear to be present. If the indoor plant contract with the hotel were to cease, the supplier would probably be left holding an excess supply of indoor plants. This observation also appears significant as it again represents an example of a hotel capitalizing on asset specificity to motivate a high level of commitment from the supplier. By requiring the subcontractor to own the plants, an additional inducement for effective maintenance of the plants is established. Should plants die, the sub-contractor will incur the cost of replacing them. Should the sub-contracting service provided prove to be deficient (e.g., plants not kept in a healthy and attractive state), then the sub-contractor is exposed to the potential of losing the contract and then bearing the costs associated with dedicated asset specificity. While the theoretical principles of this particular observation are believed to be illuminating, it should be noted that the dedicated asset specificity is somewhat constrained due to the fact that compared to many other assets, indoor plants do not represent a major investment. When the value of the investment in indoor plants is placed in the context of the sub-contractor acting as a sole operator, however, it appears that the cost of the plants is sufficient to signify the presence of dedicated asset specificity.

Temporal asset specificity

Two observations made in the field study concern the need for timely completion of an activity, and the implications that this carries for the outsourcing decision. These observations relate to public area cleaning and laundry.

FC(b) in hotel 1 indicated that public area cleaning would not be outsourced as it was perceived to be too important an activity. This particular hotel complex was large and attached to a casino, which signified it was open 24 hours a day. In light of its round the clock activity, it was perceived as important that staff be on call to quickly deal with any cleaning required (i.e., the timing and coordination of this activity was exceedingly important). This FC recognised that a critical aspect of public area cleaning concerned the speed with which a spillage of food was dealt with and that timely cleaning in the early hours of the morning could not be assured if the cleaning function were to be outsourced.

With respect to laundry, comments made in hotels 10 and 11 highlighted a perception that it was risky to outsource this activity because of the importance of timely return of clean laundry. The FC of hotel 10 elaborated on her experiences in other hotels where laundry operators had sometimes lost linen and sometimes made deliveries to the wrong hotel. Hotel 11, which, due to its building's design was not able to provide its own laundry service, was experiencing problems with timely laundry delivery, especially during times of high occupancy. It is during times of high occupancy that the laundry supplier operates at or close to its full capacity, because it is at these times that other hotels in the area also tend to be achieving high occupancy levels. Somewhat ironically, it is at the very time that hotels can most ill-afford to experience a delay in laundry delivery – during a period of high occupancy – that delays ,due to logistical problems experienced by the laundry sub-contractor when operating at full capacity, are most likely to happen(). In hotel 11 the management had argued for a greater investment in linen to deal with this problem, but the owners were unwilling to make the investment.

Human asset specificity

As a result of the relatively low skilled nature of much of a hotel's labour force, it may well be the case that relative to other industries, the incidence of human asset specificity is limited in the hotel industry. Despite this, four observations that appear to signify the presence of human asset specificity were made during the field study. These observations relate to: development of marketing strategy, information technology (IT), chefs, and housekeeping.

One could argue that the development of strategic marketing is highly asset specific, i.e., it requires specialised knowledge and experience that is specific to a particular organisation. Most interviewees felt that this activity could not be outsourced as it represented a sensitive aspect of the business that raises confidentiality issues. However, hotel 1 represented a relative outlier in this regard, as it had contracted out much of this activity to a marketing consultant. FC(a) justified this decision on the grounds that the consultant was a specialist in the field. While hotel 1's decision to outsource strategic marketing appears to counter the TCE prescription on human asset specificity, it was notable that FC(a) felt it pertinent to comment on the need for a carefully prepared contract to mediate the relationship with the consultant. Much of this contract contained provisions relating to confidentiality.

Also in hotel 1, FC(b) talked of a desire to outsource IT. She recognised that significant training was warranted for the handful of IT staff and that much of the training was unique to the hotel's particular needs. Despite the ability of staff members to command large salaries, IT proved a problematical area due to high staff turnover. Although the hotel had on a number of occasions reviewed the possibility of outsourcing the function, deliberations had always resulted in a decision to continue conducting the activity in-house. The following three reasons, some of which were noted by FC(b), appeared to lie behind this decision:

1. Any provider of this professional service would have to make some human capital investment by training personnel in knowledge that is specific to the needs of the hotel. If the contract with the hotel were to lapse, the value of much of this hotel specific investment would be lost.
2. The supplier would effectively face the same problem as the hotel, i.e., the risk of staff turnover and a resulting inability to service the needs of the hotel. It should be noted, however, that an advantage associated with specialisation is the larger pool of specialised labour resulting. With a larger pool of labour, the specialist provider might be better placed to deal with a labour shortfall (i.e., the ability to spread a specific volume of overtime work across a larger pool of labour results in less per capita overtime than if it is spread over a

smaller labour pool). In addition, the specialist provider is likely to have better employment agency contacts in the IT field.

3. As already noted, this particular hotel complex was open for 24 hours per day. FC(b) felt that, consistent with the problematical issues that this poses for outsourcing public area cleaning services, it is a factor that would complicate any attempt to sub-contract the provision of IT services. The nature of the hotel's operations signifies that it may require IT expertise at any time during the day or night. This particular facet of the problem of outsourcing the IT function therefore also appears to relate to temporal specificity.

Some high quality hotels have restaurants that are run by top chefs, with the restaurant bearing the name of the chef. In this situation, the hotel can be seen as somewhat exposed to risk as the continued success of the restaurant depends on the chef remaining with the hotel. To secure heightened commitment from the chef and thereby reduce the hotel's exposure, rather than employing the chef in-house, some hotels have contracted out the restaurant's management to the chef. Although there were no specific examples of this practice being applied in the hotels where interviews were conducted, this idea was discussed by the GM in hotel 8, who knew of the practice being applied in overseas hotels. This idea appears to be significant, as it constitutes an arrangement that contradicts the asset specificity prescription of TCE. Rather than human asset specificity resulting in an activity being mediated in-house, in this scenario it is a factor that motivates the activity being outsourced. It should be noted that a distinct aspect of this example of human asset specificity is that the skills are unique to the chef rather than unique to the hotel.

Human asset specificity and dedicated asset specificity

One observation that appears pertinent to both human asset specificity and dedicated asset specificity was noted. Shortly before the conduct of the field study, hotel 7 had made the decision to outsource housekeeping to a cleaning subcontractor with no prior experience in the provision of hotel cleaning services. In this particular situation, human asset specificity appeared to be present as the subcontractor had to train staff in a form of cleaning that was different from that required in its other cleaning contracts (e.g., an experienced office cleaner may have limited appreciation of effective approaches to bathroom cleaning). In addition, if the contract with the hotel were to be terminated, it may be difficult to redeploy staff to other areas. Consequently, excess capacity, which signifies dedicated asset specificity, might result. This perspective of human asset specificity is related to the unique skills that are particular to an industry (hotels) rather than to a particular hotel.

Because of the investment made by this housekeeping subcontractor, a penalty clause guaranteeing a certain level of occupancy was included in the outsourcing contract. Although this penalty clause moved some of the risk associated with the provision of the cleaning service back to the hotel, it appeared that the hotel's risk exposure was relatively limited, as it only had to provide three months notice of an intention to terminate the subcontracting arrangement. In light of the risk exposure assumed, one might have expected the subcontractor to have negotiated a longer contract in order to protect its interests. When this issue was raised with the FC in hotel 7, he acknowledged it and commented that the subcontractor had appeared particularly keen to secure the contract because it wanted to diversify its contract cleaning work into the hotel sector.

Brand capital

Observations relating to the brand capital dimension of asset specificity were made in connection with the outsourcing of restaurants, F&B in general, F&B prepared for conferences and the ownership of linen. Before describing these observations, a brief comment on the relationship between "core activities" and the brand capital dimension of asset specificity appears warranted. This is because it was found that a frequently cited reason for not outsourcing a particular activity was that the activity in question was described as core to the business. When interviewees were asked to elaborate on this view, they generally referred to a reluctance to being exposed in those activities that are "too important to get wrong", i.e., those activities where the hotel's reputation was at stake. This reference to reputation in connection with what constitutes a core activity appears to highlight a conceptual linkage between core and the brand capital dimension of asset specificity.

The FC in hotel 10 elaborated on the importance of reputation. She noted that if an outsourced restaurant were to fail, it could have grave consequences on a hotel's reputation. She commented:

> 'A bad reputation tends to stick, and it could also be very difficult for that outlet to become successful when it has a bad tag against it. In our industry it is very unforgiving.'

When considering brand capital in connection with restaurant outsourcing arrangements, two distinct perspectives can be taken. In addition to the hotel's brand capital, there is the restaurant's brand capital. As already noted, hotel 1 outsourced the management of one of its restaurants to a specialist Asian restaurant chain with a reputation for high quality dining. In this situation the hotel found it easier to sub-contract as the restaurant had a reputation to protect. The restaurant's need to protect its own reputation provided the hotel's management with a degree of confidence that the restaurant would not be managed in a way that might tarnish the hotel's reputation. In effect, the brand capital of the restaurant provided a degree of assurance for the hotel when it entered into the sub-contracting arrangement. In this case, the restaurant's brand capital can be seen to have facilitated the outsourcing arrangement and not to have inhibited it. This observation is significant because it highlights how the presence of brand capital can facilitate rather than inhibit an outsourcing arrangement. Thus, it clearly represents a situation that conflicts with the basic TCE theorem concerning the brand capital dimension of asset specificity.

Several interviewees expressed a desire to outsource their F&B activities as they viewed them as relatively problematical areas that provided little profitability. There appeared to be a significant concern over the potential for negative implications arising from the provision of a deficient F&B service, however, and this factor represented a major constraint on the degree to which F&B was outsourced. Indeed, it was apparent that restaurant outsourcing appeared to be viewed as a viable proposition only in those hotels that had more than one restaurant. The rationale for this appears to be that the downside of an outsourced restaurant failing to maintain a satisfactory level of service was limited due to the availability of a second dining option.

The GM in hotel 8 appeared to be particularly aware of the damage to reputation that might result if a loss of control were to result from outsourcing F&B associated with conferencing. He noted that some activities associated with conferencing could be and are outsourced, e.g., casual F&B staff, entertainment, guest speakers, technical staff and technical equipment. However, he claimed that the preparation of F&B for conferences would rarely be outsourced. This was because:

> 'You really need to make sure that you deliver because that is your customer. You might purchase cookies and things like that, pastries, but you would try and do most of it yourself … So in terms of catering, I think very little (would be outsourced)'.

In several hotels the issue of maintaining a strong reputation also affected attitudes towards the ownership of bed linen. Hotels that outsource laundry have the option of using their own linen, or linen provided by the laundry service provider. Of the hotels interviewed that outsourced laundry, most owned their own linen (e.g., hotels 9, 10, and 11). The reason given for this is that it signified that the hotel retained control over the timing of linen replacement. Interviewees noted that if the supplier owned the linen, it would probably be replaced only after an unacceptable level of deterioration. They also felt that it was difficult to contract out linen ownership because linen replacement is open to judgement and difficult to contract for. The contractor would always have an incentive to extend the life of the linen while the hotel would have an incentive to replace the linen sooner due to the potential damage to its image that can result from using old linen.

Discussion and Conclusion

The overriding conclusion of this study is that asset specificity represents a useful construct that should be drawn upon when attempting to understand hotel outsourcing decision making. Adoption of the six sub-dimensions of asset specificity commented on by Williamson (1985, 1988, 1991) appears to have provided a valuable framework for appreciating the variety of ways that asset specificity can be manifested in the context of hotel management. The two asset specificity sub-dimensions that appear to be particularly pertinent in the context of hotel management are site specificity and brand capital. It is likely that the significance of site specificity derives from the fact that hotels sell their services on site, i.e., any outsourced service that requires interaction with the hotel's customers will have to be located on the hotel's site. The significance of brand capital is unsurprising when we recognise the considerable importance attached to branding in the premium end of the hotel market. Had the study focused on lower quality hotels, it is unlikely that brand capital would have emerged as such a significant dimension of asset specificity.[6] It is noteworthy that no observations signifying the existence of physical asset specificity have been made. This may well be a function of the service-oriented nature of the hotel sector.

Asset specificity appears to be a particularly useful construct for sharpening our appreciation of factors affecting the way that subcontracting arrangements are structured. For instance it was noted that a disco operator was required to incur substantial costs to create a separate entrance to the disco (representing an example of site specificity). The hotel operator recognised that once the disco operator had incurred this asset specific investment, he would have an additional incentive to provide a good service. In light of the asset specific investment undertaken, the hotel agreed to extend a relatively long-term contract to the disco operator. In this case, the asset specific investment can be seen to have accounted for the degree of confidence that the hotel operator felt in the subcontracting relationship. In particular, this degree

[6] From Table 1 it can be seen that all hotels interviewed had an RACQ star rating of 4.5 or above.

of confidence appears to have manifested in the length of the contract agreed to by the hotel.

Although most observations support the TCE asset specificity prescription that high asset specificity results in insourcing, two particular observations are noteworthy, as they contradict TCE theory:

1. While not observed as a practice in any of the hotels where interviews were conducted, it was noted in the literature that many hotels with restaurants bearing the name of a celebrity chef like to outsource the management of the restaurant to the chef. This is to provide an inducement to the chef to continue his association with the restaurant. Hotel 8's GM claimed to have seen this practice applied in overseas hotels. This can be seen as an arrangement that contradicts the TCE human asset specificity prescription, as it is an example of high asset specificity giving rise to an outsourcing arrangement.
2. One hotel was observed to be outsourcing the management of a restaurant to a chain with a high quality reputation. It appeared that from the hotel's perspective, the need of the restaurant operators to maintain their own reputation provided a safeguard that the restaurant would be managed in a way that would not negatively impinge on the hotel's reputation. In this case, the restaurant's brand capital can be seen to have facilitated the outsourcing arrangement and not to have inhibited it. This therefore also appears to be a particular case that contradicts the TCE asset specificity prescription.

This study suffers from the normal shortcomings associated with field work based on a limited sample of observations. The limited observations compromise any attempts to provide generalisable assertions. Rather than attempting to provide the basis for any generalisable assertions, however, the study was focused more on exploring the ways that asset specificity might manifest itself in hotel outsourcing decision making.

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Chapter 12

Irish Theme Pubs

An Evaluation Of Environmental Cues

By G. Barry O'Mahony, Wayne Binney and John Hall

Abstract

A major phenomenon in hospitality retailing in recent years has been the growth in Irish theme pubs. These pubs consist of a collection of both tangible and intangible attributes referred to as environmental cues or atmospherics. Although environmental cues have been found to have a significant influence on consumer behaviour, little research has been conducted into their effects within Irish theme pubs. Using an established research framework, the aims of this study were to identify and evaluate environmental cues within Irish theme pubs and to establish how the dimensions of this framework influenced customers of Irish theme pubs in Melbourne. Qualitative interviews were conducted with customers of six selected Irish theme pubs and with the owners of these establishments. Whilst confirming the importance of environmental cues to Irish theme pub customers, the study also provides information that has application for hospitality retailers.

Introduction

Over the past decade, Irish theme pubs have been exceedingly popular and profitable entities within the leisure and hospitality sector, both at the national and international level (Goldsmith, 1996; Walkup, 1997; Brown and Patterson, 2000; West, 2001). In Australia, the financial success of Irish theme pubs in Melbourne has been documented by O'Mahony (2002), and by O'Farrell (2000) who reports that sales of Guinness increased 181% in the decade 1990–2000.

Despite rapid growth in this sector, little research has been conducted into the Irish theme pub phenomenon. A UK study by Knowles and Howley (2000), however, proposes that the success of Irish themed pubs can be attributed to the added value experience that is provided at very little or no extra cost. A major aspect of this added value is the environment in which the product is sold. Indeed, early research into sales environments has established the ability of particular buying environments to produce specific emotional effects in buyers (Kotler, 1974). Using the term atmospherics to describe environmental cues, Kotler (1974) asserted that *atmospherics* is an appropriate management tool in situations where (i) the product that is purchased is consumed within the purchasing environment (this becomes more relevant as the number of competitive outlets increase), (ii) where product and/or price differences are small, and (iii) when the product is aimed at specific groups of buyers. Whilst Kotler's suppositions have been advanced in subsequent research, most studies focus on the design of shopping precincts and store layout (Donovan and Rossiter, 1982; McGoldrick and Pieros, 1998; Turley and Millman, 2000).

Nevertheless, theoretical and empirical studies in the literature have established that retail environmental cues, or *atmospherics*, influence a wide variety of consumer evaluations and behaviours (Bitner. 1990; Turley and Furgate, 1992). In a comprehensive review of the literature in this area Turley and Millman (2000) clearly establish that further research is warranted. It is further noted in this review that, of the fifty-five studies dealing with atmospherics that were conducted between 1964 and 1997, none have direct relevance to pubs, entertainment venues, food and beverage facilities or any other forms of hospitality retailing.

Berman and Evans (1995) have developed a theoretical framework for these types of retail encounters, which was subsequently modified by Hoffman and Turley (2002) to incorporate a number of theoretical aspects of *atmospherics* that can influence the consumer experience (Refer to Fig. 1). This model was deemed appropriate to guide this study because many of the dimensions incorporated in the model have a significant influence on attracting, serving and satisfying the needs of consumers (Hoffman and Turley, 2002).

Research within the retail hospitality industry, for example, found image and atmosphere to be one of the most critical factors in the selection of restaurants (Auty, 1992; Kivela, 1997; Babbin and Attaway, 2000). Moreover, the growth in "theme" restaurants worldwide provides evidence that a standardised experience and controlled ambience is attractive to a large sector of diners (Kotler, Bowen & Makens, 1996). However, apart from these studies, and a publication by Brown and Patterson (2000) that concludes that theme pubs are all about 'excessiveness' and 'capturing the essence of the represented phenomenon' (p658), little is known about the influence of atmospherics within the hospitality sector.

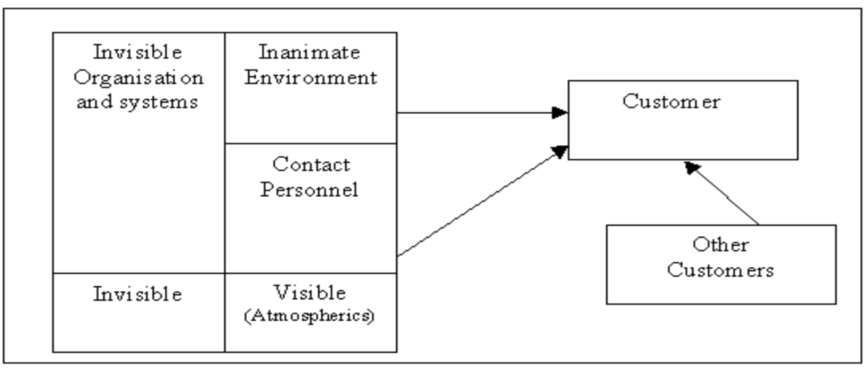

Figure 1
Atmospheric influence on the consumer experience (Hoffman & Turley, 2002, p 40).

Components of the Hoffman and Turley model

The principal components of the model are the visible and invisible environmental cues also referred to as the atmospherics. An outline of these dimensions is provided below.

Invisible atmospherics

In the Hoffman and Turley model, the term "invisible atmospherics" incorporates two elements. Firstly, there is the invisible organisation and systems, which involves managing the environment, the provision of goods and services and the selection, training and management of personnel. This might involve various management styles as well as the often extensive documented management procedures that form part of the system of management. These procedures can vary greatly between different entities within the hospitality sector. At McDonalds restaurants, for example, the major management focus is on implementing a rigid set of management principles, recipes and guidelines in order to ensure that both the product and service are uniform and consistent. It is important to note, however, that consumers are often not aware of this controlling influence.

The second element of the invisible environment includes intangible environmental cues, such as perceptions of service quality, friendliness of staff and general atmosphere. These dimensions have also been found to be influential in the service quality literature where they are associated with the willingness of staff to respond to customers needs as well as product knowledge and competency (Zeithaml et al, 1990).

Visible atmospherics

Visible atmospherics include the inanimate environment as well as contact personnel. In themed environments this can include colours such as known national colours (e.g. the green, white and orange associated with Ireland), posters, artefacts, and other theme-related decorations. The pint-sized glasses used for beer in pubs in Ireland for example, are currently used to enhance the perception of authenticity in Irish theme pubs in Melbourne.

Inanimate environment

The inanimate environment includes both the exterior and the interior of the sales environment. The exterior environment in the atmospherics model operates on two levels. The first of these relates to the location of the outlet, the provision of parking, windows, colours and signage. The second is concerned with the macro environment of the venue including issues like whether the sales environment is located within a shopping centre and what kind of other businesses surround the sales environment.

The interior environment includes the overall interior environment as a whole (image), music and sounds, ambient colours, lighting, design and layout, product displays, internal signage, decorative style and provision for patron comfort. Within Irish theme pubs each of these components is strongly connected to the notion of authenticity (O'Mahony, 2002).

Contact personnel

The term "contact personnel" includes the number of service providers, their appearance, and skill level or ability to perform the retail task. There are recognised links between this dimension of the atmospherics model and the "tangible" dimension of service quality outlined by Zeithaml et al (1990). In the hospitality industry in general the tangible aspects of the environment can include uniform and grooming with a strong emphasis on those aspects of employee presentation that relate to hygiene such as hair, makeup and the amount of jewellery worn by contact personnel. In Irish pubs, however, the uniform can be seen as a measure of authenticity (costume) as can a number of other visible or tangible aspects of the service environment.

Customer

A central part of the model is customers and their interaction with other components of the model including the environment and the type and level of interaction with other customers. As the findings of this study show this is exceedingly important in Irish theme pubs.

Other customers

The manner in which customers interact is a key aspect of the retail experience as well as issues such as crowding, or the lack of customer numbers.

Aims of This Study

The aims of the study were to identify and evaluate environmental cues within Irish theme pubs. Specifically, the study aimed to establish how each of the dimensions of Hoffman and Turley's model (Figure 1) influenced customers of Irish theme pubs in Melbourne. Whilst the importance of tangible or visible aspects of hospitality retailing are relatively well known, this study also covered the 'invisible organisation and systems' in place within these retail outlets.

Methodology

According to Strauss and Corbin (1990), 'qualitative methods can be used to uncover and understand what lies behind any phenomenon about which little yet is known' (p19). Since few studies have been conducted into Irish theme pubs, qualitative procedures were appropriate. Data collection procedures in this methodology can include '… group and individual interviews, direct observation and written documents, including questionnaires, personal diaries and program records' (Patton 1987:280). In this study, in-depth, semi-structured interviews were conducted with 24 customers of Irish theme pubs as well as the owners or managers of six of these pubs.

The main focus of the investigation was the relatively new Irish theme pubs because these pubs were perceived to have set a particular trend in terms of environmental cues. Consequently, five of these pubs were selected for the study, however, for the purpose of comparison, one of the older, established Irish pubs (The Dan O'Connell) was also included. A further sampling consideration was that some Irish theme pubs are located in the city of Melbourne while others are in the suburbs. In this study three pubs were chosen from within the city of Melbourne and the other three were suburban. Table 1 outlines the six pubs that were selected for the study.

Table 1

The six selected Irish theme pubs.

Bridie O'Reilly's (An Irish theme pub in the Melbourne suburb of Brunswick)	**Pugg Mahone's** (An Irish theme pub in the city of Melbourne)	**Finbar's** (An Irish theme pub in the Melbourne suburb of Brighton)
The Quiet Man (An Irish theme in the Melbourne suburb of Flemington)	**P.J. O'Brien's** (An Irish theme pub in the city of Melbourne)	**The Dan O'Connell** (An established Irish pub in the inner city of Melbourne)

A non-probability, convenience sampling method was used to select four respondents from each pub for interview (24 in total) and a gender-balanced sample was achieved. A profile of respondents is provided as an appendix to this paper (see Appendix A). Whilst respondents have been given code names on this list, in each case the code name was culturally aligned with the respondents' original name. For example if a respondent's name was John Smith, an obvious Anglo name, a similar Anglo name was given as the code name, for example, David Jones. This allowed for some tracking to occur during the analysis so that those of Irish heritage, for instance, could be grouped if necessary.

The following table shows some of the characteristics of respondents in the sample. Although the sample was a purposeful, non-probability quota sample, Table 2 highlights the gender balance, the range of age groups and the occupational status of respondents.

Table 2

Age, gender and occupational status of respondents.

Code Name	Gender	Age	Occupation	Name of Pub
Anne Brennan	Female	34	Entertainer	Finbar's
Chris Brennan	Male	36	Entertainer	Finbar's
Katrina Womax	Female	20	Secretary	Bridie O'Reilly's
Daniella Rhodes	Female	19	Student	Pugg Mahone's
Jane Williams	Female	19	Student	Bridie O'Reilly's
Jonathon Harvey	Male	20	Barman	The Dan O'Connell.
Trevor Edwards	Male	20	Service station attendant	The Dan O'Connell.
Anthea Stuart	Female	26	Employment consultant	Pugg Mahone's
Robert Hill	Male	20	Bar manager	P. J. O'Brien's.
David Phillips	Male	39	Business consultant.	Bridie O'Reilly's
Kevin Richards	Male	37	Tour operator	Bridie O'Reilly's.
Lawrence Hopkins	Male	34	Economist	Finbar's
Liz Steiner	Female	41	Office administrator	P. J. O'Brien's
Stephanie McEvoy	Female	34	Social worker	The Dan O'Connell
Lauren Davison	Female	33	Public servant	The Quiet Man
Jack Parker	Male	55	Lecturer	P. J. O'Brien's
Paul Murphy	Male	23	Retail manager	Pugg Mahone's.
Rosemary Martens	Female	47	Teacher	P. J. O'Brien's.
Ben Davison	Male	30	Plumber	The Quiet Man
Ron McIntosh	Male	41	Business Manager	Finbar's
Deirdre O'Sullivan	Female	36	Home Duties	The Quiet Man.
Vincent Flood	Male	19	Student	Pugg Mahone's.
Richard Ellis	Male	28	Manager	Bridie O'Reilly's
Patricia Jones	Female	24	Student	The Quiet Man

Results

The resulting data were transcribed and analysed and a summary is presented thematically under the headings of the Hoffman and Turley model. Selected quotes from theme pub customers are presented throughout and respondents' code names have been used to protect their identity (see profile of respondents provided as appendix A). Interviews were also conducted with the owners or managers of the six selected Irish theme pubs. Once again, qualitative quotes are presented, however, the pub owners and managers have been named with their consent.

Invisible organisation and systems

The invisible organisation and systems includes the way the environment is managed and one issue related to this is the level of authenticity that is achieved. While all of the respondents were positive about the Irish theme pub environment, authenticity was raised as an important theme in this study and also permeated a number of other themes. One respondent, code named Ron, offered a view on the issue related to Bridie O'Reilly's in Chapel Street. Although this pub was not in the study, its similarly styled sister pub of the same name located in Brunswick was included. Ron observed that it was bright and clean but not new looking which he believed was a deliberate attempt to make it look old. 'It's like an artifice of what these pubs are expected to be but at the same time appealing to peoples sensibilities'. he asserted. Ron was one of a number of respondents who compared Bridie O'Reilly's to McDonald's, asserting that it was contrived as a marketing exercise rather than in an effort to share Irish culture. Several other respondents also felt that Bridie O'Reilly's in Brunswick was overdone, leading them to conclude that it is not authentically Irish. Curiously, a number of these respondents had never been to Ireland and so they were expressing their perceptions of what an authentic Irish pub *might* be like.

Nevertheless, all of the respondents expressed the view that Irish theme pub owners have created a point of difference from other pubs that is recognisable to customers. Indeed, Jack reported that there are a number of visible distinguishing features about these pubs that identify them as distinctly Irish. He went on to say:

> 'I think if I were blindfolded and taken into a pub and it's revealed to me, I could tell immediately that it is an Irish pub. So in saying that I think that, yes, I think that they have tapped into something that's recognisable. Whether it is fair dinkum Irish or not is a bit hard to say.'

Invisible

The invisible environment is different from the invisible organisations and systems in that it includes intangible environmental cues such as friendliness. When questioned about the reasons for the popularity of Irish theme pubs all of the respondents stated that a major attraction was the atmosphere. This invisible aspect that was perceived to be positive and was summarised positively by Robert who reported that 'there was no trouble [which he believes was] probably because of the atmosphere that was generated. It's happy, there's no negativity in there whatsoever'. Liz concurs with this view, stating, 'I have never been in a situation in an Irish pub where I felt uncomfortable or have seen any problems. I'm sure that they have their problems but it's never been obvious to me'. Rosemary shares this view but also notes a cultural element, advising, 'I don't like pubs. Going to an Irish pub from outside the culture is a different kind of experience than going to a pub within your own culture'.

Robert also believes that the positive atmosphere in Irish theme pubs is created and enhanced by interaction between customers and the bar staff. '… If they [the staff] see someone sitting there they'll go up and they'll most likely talk to them, they'll chat to them …' he reported, asserting that there is something unique or special about the way Irish people interact with others. Jack was also impressed with the interaction he had with a non-Irish staff member when he visited an Irish theme pub. When he asked what the word *shībīn*, written on the waitresses apron, meant she replied 'it's an illegal drinking house, if you hear the police coming run out this door'. He had enjoyed the joke and remarked how this kind of humour adds to the Irish atmosphere.

Inanimate environment

In this study, the external environment was not rated as important by respondents, however they placed a great deal of emphasis on the interior decoration, particularly in relation to fabrics, tones and materials, the design and positioning of the seating and the artefacts and memorabilia that are incorporated. When asked about décor Anne advised '… that each pub that I have seen, so far, has been quite unique, to a degree'. Despite her Irish background, she was impressed by the decor in a number of city and suburban Irish theme pubs noting that one had a printing press and all sorts of books while another seemed to concentrate on agricultural implements. The major similarity between them, she felt, was the antiquity of the items that were on display. She firmly believes that this is a sharing of Irish culture. She also felt that the open display of Irish culture in the form of historical artefacts provides an insight into Irish history.

Lauren also reported that the Irish theme pubs that she has visited '… have all been quite different', whilst Kevin appreciated the manner in which these pubs have been designed, advising that the booths or nooks, as he referred to them, were an attraction for him because they offer 'a little privacy for your own conversations and a sense that "this is my area" and you can invite people into that little area'.

Another aspect was the music and the majority of respondents expressed the view that the music that they wanted to hear in Irish theme pubs is authentic Irish music. They specifically noted, however, that they did not want token Irish jigs and reels, insisting that they wanted to hear both traditional and contemporary Irish music, especially that which is currently available in Ireland. This would seem to suggest that, at least with respect to music, respondents are seeking authenticity rather than some romantic notion of Irishness contrived purely for their benefit. Siobhan believes that one of the attractions of Irish music, whether it be traditional or contemporary, is that it is ageless.

Contact personnel

As previously noted, contact personnel would include the number of service providers, their appearance and the skill level required to perform the retail task. In this study, all of the respondents reported that the service personnel were an important aspect of the Irish theme pub especially in terms of the creation of a positive, friendly atmosphere. This was seen as different to other entertainment venues. As Jonathan noted 'its different – you can chat to the security guys at the door and they're friendly – not like at the clubs'. Robert also advised that the atmosphere is 'mainly due to the staff. The staff there, they're always friendly, always bubbly, always wanting to have a joke and that's just part of the service that I'd go back for …'.

Jack was adamant that 'in an Irish pub you have to have Irish staff or you lose everything you've tried to set up'. Several other respondents shared this view and identified Irish accents as an attractive component of Irish theme pubs. This was linked to the issue of authenticity and led to the question of whether the staff in Irish theme pubs should be Irish. According to the Irish Pub Company (2001:1), 'friendly, efficient, Irish bar staff …' are among the success factors in the creation of an authentic Irish theme pub. This was confirmed in this study. Indeed, many respondents expressed the view that at least some Irish staff ought to be present to complement the theme. For example, Liz reflected, 'I think Bridie O'Reilly's must have some policy where they only appoint people with an Irish accent and that certainly adds to the atmosphere …' Rosemary supported this view asserting that the Irish accent '… is a very highly valued attraction'. Siobhan, who is Irish, felt more strongly, explaining that it is vital to have Irish bar staff:

> '… very often it's the bar staff who set the tone of the pub itself, be they male or female. You know, the welcome that you get from them is crucial and I think that the Irish have a very particular way of welcoming, particularly strangers. They seem to know how much to give and how much to reserve so there's a welcoming but they're not totally "in your face". There's an invitation to friendliness but it's not overpowering …'

Customer

In this study, the behaviour and disposition of customers were linked to a notion of Irishness. Lauren believes, for example, that part of the attraction of Irish theme pubs is the Irish attitude to life. When asked what she perceived this to be she stated that '… it is a "such is life" attitude, "I'm here to have a good time, if I have one beer, I have one beer, if I end up under the table, well that's life"'. Most respondents felt that Irish people know how to have fun and those respondents who had either been to Ireland or had some experience of Irish culture used the Gaelic term *Craic* when describing their reasons for going to, or their experiences at, Irish theme pubs. Siobhan believes that people have fun at Irish theme pubs because:

> '… there is an unwritten code amongst Irish people that when you are in the pub you're there to have a good time. She explained that when you go into a pub … you take everything in with you, you know, you take your problems and everything but there's a certain kind of expectation that you'll have a relaxed sort of jovial time.'

One thing that can quickly transform a fun atmosphere, however, is drunkenness. One of the most significant themes that emerged during the interviews was a perceived lack of drunkenness in Irish theme pubs. Katrina attempted to articulate this stating that 'there wasn't any drunk, I mean they were drunk but they weren't like, do you know what I mean?' This statement seems contradictory, however, Katrina explained that Irish theme pubs didn't seem to have customers who were drunk or sleazy or drowning their sorrows in a drunken depression. 'People were there to have a good time,' she stated. 'I don't like pubs [she continued], the whole pub atmosphere does nothing for me but this is not your typical average corner pub'. Daniella agreed and suggested that security is unnecessary at Irish theme pubs because 'you just never really see anybody getting feisty about anything, everybody's pretty happy-go-lucky'. Like Katrina she felt that people didn't go there to get drunk.

Other customers

Several respondents identified other customers as important especially in the creation of atmosphere. Lawrence noted for example, that 'everybody's up and moving and talking and laughing out loud, so it's got that pub atmosphere where you know people are more likely to mix and move through the room.' Lauren also believes that '… it's the attraction of the clientele – it's drawing a crowd that actually just want to go and have a conversation and a drink'.

This begins with the welcome, which respondents believe creates an atmosphere in which one can relax and have fun. Indeed, every respondent reported that they had fun at Irish theme pubs. Even Katrina, who confided that she is '… not a pub person', had enjoyed her recent visit because she found that the Irish theme pub '… just had something that other pubs don't have …' Jonathon explained that there is a level of inclusiveness about the atmosphere in Irish theme pubs. He reported that the atmosphere at the Dan O'Connell 'is just unreal. Its not like your classy pub crowd where it's "who are you?" [he reported] it's sort of "hey come on", it doesn't matter who you are, if you're 60 or 18 …' Inclusiveness was important to Liz as well. She advised, for example, that 'you don't have to feel like you're a member of a club or that you come from a particular country, to feel comfortable there'. In contrast, she felt that some other pubs and clubs in Melbourne were a bit more exclusive and she feels that this openness and inclusiveness was one of the most attractive aspects of Irish theme pubs.

Pub owners' views

In order to corroborate consumers' perceptions, the owners (or managers) were presented with a number of findings and interviewed using a semi-structured interview format. Most of them were aware that the people and, more importantly, the kinds of people, who frequent Irish theme pubs are in fact an essential ingredient in these pubs.

They also recognised the value of Irish accents in enhancing the authenticity of the venue. When asked if it is important to customers to be served by Irish bar staff, for example, one publican stated that 'in a perfect world we'd have all Irish staff but unfortunately it's not a perfect world'. By this he meant that the current Equal Opportunities Legislation was restrictive because 'you need to get the staff that relate to the country that it's from [the theme pub]'. He asserted that '… if you can't get them it looks a bit silly. If you have 99% Australians in an Irish bar, it might as well be just another bar'. Almost all of the Irish theme pub operators felt that it would be unfair not to employ Australian bar staff as well but that they had difficulty in achieving a balance. One pub manager reported that he was currently employing 80% Australian bar staff because he couldn't advertise for Irish born staff.

An important aspect of Irish theme pubs is the manner in which they are designed. On behalf of Bridie O'Reilly's, Des Healy asserted that creating an authentic, recognisable environment was vital '… so that when they [the customers] come in, it is recognised as an Irish pub'.

Authenticity in the design of the pub was also seen as an important feature. At Finbar's Irish theme pub in Brighton, for example, Paul Morgan explained that:

> 'it's just the way they're done and the owner of this place has done a really good job, I think, in the way that he's actually set it out. Ninety per cent of the Irish pubs that are in Melbourne have got that old feeling, I mean all the old bric-a-brac and stuff, I mean it's got to be put in the right way to have effect and it does.'

He went on to caution that 'you can't just open an Irish pub and put stickers up and flags up and think you've got an Irish pub …'

This issue was also explored with Kevin Webb of the Dan O'Connell, an established Irish pub. Kevin stated that he doesn't need to rely on artefacts because the long and rich history of that establishment resonates within it, creating a vibe that is almost tangible. He reported that he has seen some of the toughest of men who are known in the local community for their violent tendencies, become calm and respectful because the atmosphere in the pub is pervasive. He went on to say that each night is targeted towards a community of people in the city that is diverse in age range and professions. 'In here the "Wharfie" rubs hands with the labourer, the doctor and the lawyer'. Finally, Kevin was asked why the atmosphere in the Dan O'Connell was so spellbinding. Revealing a spiritual dimension he answered 'I just believe that there's been a lot of souls in this place that have been very well respected and very well judged by their creator'.

Implications

There are clear implications for hospitality retailing and the development of themed hospitality venues. The manner, in which customers interact, for example, was found to be an extremely important factor, as was the friendliness of staff. One important dimension of the staffing of Irish theme pubs was the expectation that staff not only needed to be skilled in aspects of bar work but also needed to have a sense of humour, be able to answer customers' questions about Ireland and Irishness and be gregarious.

It is also concluded that security and the screening of patrons is essential to maintaining the special Irish theme pub atmosphere. This may seem incongruous considering most respondents suggested that security was not an issue because they had never witnessed any incidents that required the presence of security at an Irish theme pub. However, it is not just the security of the premises or the customers within the premises that needs to be protected, it is in fact the security of the product.

Another notable aspect of the Irish theme pub experience is the product lifecycle. The visible or tangibles aspects, such as the old-world décor and layout as well as the respondents' desire for traditional Irish music suggests that, unlike nightclubs, Irish theme pubs will not need to be updated or refurbished on a regular basis. Indeed, the older they are the more authentic they are perceived to be, a factor that could have substantial benefits in terms of fit-out costs.

In summary, Hoffman and Turley's framework was a useful guide in identifying the environmental cues that are important to customers of Irish theme pubs. The dimensions and dynamics of these cues have also been uncovered allowing hospitality retailers to customise the atmospheric environment to their specific needs. The study is limited, however, by the local focus (Melbourne) and by the sampling criteria and size. Nevertheless, rich data were presented that provide insights into the nature of environmental cues within Irish theme pubs whilst providing scope for further research. There is an opportunity, for example, to look at issues of security and gender within the Irish theme pub environment and to compare the findings with similar research in non-Irish pubs. The issue of authenticity is also worthy of further study.

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Appendix A
Profile of Respondents

Background information on the respondents that were selected to take part in the study, using their code names, is provided below.

Respondent number 1 Anne Brennan was born in Ireland and migrated to Australia in 1988 with her husband Chris. Anne and Chris are entertainers and tour Australia regularly as a two-person show. Anne visits Irish theme pubs in Melbourne once a month and was selected for interview as a result of her visit to Finbar's Irish theme pub in Brighton. At interview she drew on her experiences in pubs in Melbourne, country Victoria and Ireland.

Respondent number 2 Chris Brennan is a fast-talking Dublin man who migrated to Australia with his wife Anne in 1988. A talented entertainer, he visits Irish theme pubs once a month for business meetings. When he visits Irish theme pubs he is interested in food as well as beverages and feels that some Irish theme pubs in Melbourne are more Irish than others and that they are representative of pubs in Ireland. He was interviewed following a visit to Finbar's Irish theme pub in Brighton but also offered comment on several other Irish theme pubs in the city and suburbs.

Respondent number 3 Katrina Womax is 20 years of age, does not visit pubs very often, and does not have an Irish background. She visits Irish theme pubs for special events such as friends' birthday parties and perceives that there is a difference between Irish theme pubs and pubs where people go to get drunk. She was selected for interview following a visit to Bridie O'Reilly's.

Respondent number 4 Daniella Rhodes is 19 years of age and hails from country Victoria. She is a student at a Melbourne university and has lived in Melbourne for two academic years spending vacations at home. She does not have an Irish background but is a regular patron of Pugg Mahone's. She was interviewed in connection with her visits to this Irish theme pub.

Respondent number 5 Jane Williams is a 19-year-old business studies student living in Geelong on an income of less than $20,000 a year. She is a guitarist in what she describes as an all girl rock band and visits pubs once a week. She does not have an Irish background but visits Irish theme pubs on special occasions, spending $50 per visit on beverages. She was interviewed in connection with her visit to Bridie O'Reilly's.

Respondent number 6 Jonathon Harvey is 20 years of age, of Portuguese background, and migrated to Australia when he was six years old. He currently works as a barman, although not in an Irish theme pub, a perspective that was seen as valuable at this exploratory stage of the study. He visits Irish theme pubs once a month spending between $50 and $60 per visit on both food and beverages. Although not a Guinness drinker himself, he fraternises with members of the 100 Pint Club at The Dan O'Connell.

Respondent number 7 Trevor Ewards is 20 years of age and works in a service station. He does not have an Irish background but is a big fan of Irish rock bands. He visits Irish theme pubs once a month, spending $30 per visit on beverages. He also celebrates special events such as friends' birthdays at Irish theme pubs. He was interviewed following a visit to The Dan O'Connell.

Respondent number 8 Anthea Stuart is 26 years of age and works as an employment consultant. She does not have an Irish background but visits an Irish theme pub about twice a month and for birthdays or get-togethers. She speaks affectionately of Pugg Mahone's and was interviewed in connection with her visits there.

Respondent number 9 Robert Hill is a 20-year-old bar manager who visits Irish theme pubs once a month and spends anywhere in the region of $100–$200 per visit on food and beverages. He has a Scottish background and visited Ireland once as a toddler. Many of his friends are migrants and he believes that Irish theme pubs in Melbourne are representative of pubs in Ireland. He was interviewed in connection with a visit to P. J. O'Brien's.

Respondent number10 David Phillips is a 39-year-old business consultant. He was born in Australia of Irish lineage and visits Irish theme pubs once a month, usually in the company of his wife. He makes a point of celebrating St. Patrick's day and also visits Irish theme pubs on special occasions. He was interviewed in connection with The Dan O'Connell, however, he also offers insights in respect of Bridie O'Reilly's.

Respondent number 11 Kevin Richards is a 37-year-old tour operator and fitness fanatic who is heavily involved in white water rafting. He was born in New Zealand of Irish heritage and visits Irish theme pubs once every three months, mainly to catch up with friends. He has definite expectations in relation to how things ought to be done in Irish theme pubs and has an intense liking for Guinness. He was interviewed in relation to his visit to Bridie O'Reilly's.

Respondent number 12 Lawrence Hopkins is a 34-year-old economist born in Canada. He does not have an Irish background but visits Irish theme pubs about once a year for food and beverages. He has visited Ireland and does not believe that Irish theme pubs in Melbourne are representative of pubs in Ireland. [Others who visited and some from Ireland have said that they are. Perhaps it depends on which part of Ireland you visit. These pubs represent a non-mainstream Ireland]. He was interviewed in relation to his visit to Finbar's Irish theme pub.

Respondent number 13 Liz Steiner is a 41-year-old office administrator who was born in Australia of Irish heritage. Originally from North East Victoria, she has lived in Melbourne all of her working life. She visits Irish theme pubs once a month and on special occasions particularly Irish celebrations. She was interviewed following a visit to P. J. O'Brien's.

Respondent number 14 Stephanie McEvoy is a 34-year-old social worker living in the Western suburbs of Melbourne. She has a Scottish background having migrated to Australia at the age of 16. She visits Irish theme pubs for special occasions and points out that with two children to care for, any night at a pub is a special occasion. She has visited several Irish theme pubs and offers an opinion on the differences between the new Irish theme pubs and the more established, in particular The Dan O'Connell, a regular haunt of hers when she was a student at the University of Melbourne.

Respondent number 15 Lauren Davison is a 33-year-old public servant from Clarkefield. Some years ago she cycled around Ireland with a friend and recounted some of her experiences in Irish theme pubs there during the interview. She rarely goes to pubs to drink but often chooses to dine in pubs and visits Irish theme pubs for special events such as birthdays and reunions. She recently attended a birthday celebration at The Quiet Man and was interviewed following this visit. She does not have an Irish background.

Respondent number 16 Jack Parker is a 55-year-old university lecturer who was born in England and migrated to Australia at the age of four. He enjoys visiting Irish theme pubs for special occasions, to explore Irish culture and to partake in food as well as beverages. He has visited a number of Irish theme pubs and was particularly taken with P. J. O'Brien's. He was interviewed in connection with his visit there.

Respondent number 17 Paul Murphy is a 23-year-old retail manager who was born in Australia of Irish heritage. He visits an Irish theme pub once a month and enjoys draft Guinness. He has cousins in Ireland who he has visited and continues to keep in touch with by email. He believe that Irish theme pubs in Melbourne are representative of pubs in Ireland and was interviewed in connection with a visit to Pugg Mahone's.

Respondent number 18 Rosemary Martens is a 47-year-old teacher from Essendon. She does not have an Irish background but visits Irish theme pubs for special occasions such as celebrations with friends. She reported at interview that she didn't like pubs but was very much taken with the Irish theme pubs that she visited to celebrate special events. She was interviewed following a visit to P. J. O'Brien's.

Respondent number 19 Ben Davison is a 30-year-old plumber who recently returned from a three-year visit to Ireland where he worked as a barman. During his time in Ireland he discovered that he has an Irish background and, since returning, he visits Irish theme pubs once a month, spending $40 per visit on beer. He was somewhat amazed at the number of Irish theme pubs that had opened in Melbourne during his absence and enjoyed visiting The Quiet Man in Flemington. His interview was based on his visits there.

Respondent number 20 Ron McIntosh is a 41-year-old business manager of Scottish heritage. Ron previously owned a restaurant and he visits Irish theme pubs once every three months and for St. Patrick's and Bloom's day celebrations. He has been to a number of Irish theme pubs in Melbourne and offers a view on the differences between the old and the new Irish theme pubs. He also shares insights about Irish theme pubs he frequented while on holiday in Italy and Spain. He was interviewed following a visit to Finbar's Irish theme pub in Brighton.

Respondent number 21 Deirdre O'Sullivan is a 36-year-old Irish woman who emigrated to Australia with her husband in 1986. She is convinced that Irish theme pubs have something special to offer and that Australians could learn a lot about Irish culture by visiting Irish theme pubs. She offers a view on the social role of pubs in Ireland and was interviewed in connection with her recent visit to The Quiet Man.

Respondent number 22 Vincent Flood is a 19-year-old student who is not particularly interested in Irish culture but enjoys the surroundings of Irish theme pubs. Although he hasn't developed a taste for Guinness he enjoys Irish draft beer and was interviewed following a visit to Pugg Mahone's.

Respondent number 23 Richard Ellis is a 28-year-old manager who enjoys visiting Irish theme pubs with his wife. He is interested in food as well as beverages and enjoys sharing in the cultural aspects of Irish theme pubs. He was interviewed following a visit to Bridie O'Reilly's.

Respondent number 24 Patricia Jones is a 24-year-old university student of Welsh heritage. A self professed feminist she believes that Irish theme pubs provide a comfortable environment for women. She enjoys Irish music and the privacy afforded by the design of Irish theme pubs. She was interviewed in relation to her recent visit to The Quiet Man in Flemington.

CREATING TOURISM KNOWLEDGE

A SELECTION OF PAPERS FROM CAUTHE 2004

This book comprises a selection of papers from the 2004 Council for Australian University Tourism and Hospitality Education (CAUTHE) conference. As such it represents a permanent record of the best of the papers submitted to the 2004 CAUTHE conference. The book also is symbolic of the partnership between CAUTHE, the Sustainable Tourism Cooperative Research Centre and the University of Queensland.

The papers in the book closely reflect the theme of the conference - Creating Tourism Knowledge, a theme that reflects the growing interest in knowledge management and tourism. The book is sponsored by the Sustainable Tourism Cooperative Research Centre.

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