

# Contemporary Issues in Tourism and Hospitality Education

## 34<sup>th</sup> Annual ISTTE Conference

### Conference Proceedings



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## **General Information**

The International Society of Travel & Tourism Educators (ISTTE) is an international organization of educators in travel, tourism, and related fields representing all levels of educational institutions. Our membership ranges from professional schools and high schools to four year colleges and graduate degree granting universities. Current membership is represented by travel and tourism educators in the United States, Canada, Mexico, Australia, the Netherlands, New Zealand, Great Britain, Korea, China, Taiwan, and others.

Our 2015 Conference theme was “Contemporary Issues in Tourism and Hospitality Education” and several keynote and breakout sessions were devoted to this and a wide range of topics related to education, research, and management in the field of travel, tourism, and hospitality services.

While the overarching conference theme was Contemporary Issues in Tourism and Hospitality Education, empirical and conceptually based academic research contributions were welcomed in a variety of other areas including the following broad subject themes:

## **Paper Themes**

1. Emerging issues in travel, tourism and hospitality education and training
2. Innovative and creative teaching and learning methodologies
3. International travel and tourism issues and trends
4. Curriculum Design and Development
5. Impacts on the travel and tourism industry

All submitted papers represent original research that had not been presented in other conferences or published in a journal. In addition, each proposal was examined via a blind review process by the Paper Review Committee.

## **Types of Proceedings Papers:**

In these Proceedings, papers are presented in alphabetical order by first author’s last name in the following sections:

- Full Research Papers
- Working Papers

## **Recognition of Review Committee**

The following were selected to serve on the ISTTE 2015 review committee because of their expertise and commitment to excellence in the tourism industry and tourism education.

Their service to this 2015 ISTTE conference is sincerely appreciated.

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# FULL PAPERS

## THREE COUNTRIES, THREE UNIVERSITIES, AND ONE TOURISM CLASS

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### ABSTRACT

*This application of an innovative teaching technique describes a case study of an alternative learning experience that involved students in semester-long intercultural learning opportunities related to tourism without leaving their own universities. Students and instructors from three universities in three different countries (the United States, Mexico, and Kyrgyzstan) collaborated on a semester-long virtual tourism class that included a student group project. Lectures and small group discussions took place via Saba meeting, and further communication occurred outside of class via Saba meeting, email, and social media tools and students and instructors developed intercultural competencies through their experiences.*

KEYWORDS: global, intercultural, learning, virtual,

### STATEMENT OF PURPOSE

The purpose of this teaching innovation was to promote global tourism understanding and intercultural competence through an international education experience via technology without leaving home. Instructors and students from three universities in three different countries collaborated in a virtual tourism class to create projects and learn about tourism together.

### THEORETICAL BACKGROUND

This teaching innovation was based on the premise that management careers often involve travel or virtual international experiences working in teams or attending virtual

meetings with people from diverse cultural backgrounds (Rifkin, 2006), and influential research into intercultural communication recognizes that all communication is exchanged and influenced by culture (Hofstede, 1986; 1991; Hofstede & Hofstede, 2005). In addition, researchers have proposed models of intercultural competence encompassing attitudes, knowledge, skills, internal outcomes, and external outcomes that are useful tools for those working with diverse cultures (Deardorff, 2006; 2009; Spitzberg & Changnon, 2009). According to Deardorff (2014), “Intercultural competence is broadly about communication and behavior that is both *effective* and *appropriate* in intercultural interactions. “ Hospitality and tourism professionals interact with varied cultures on a daily basis and therefore, are in truly in need of intercultural understanding and communication skills (Hearns, Devine, & Baum, 2007).

Historically, international business experiences meant that managers travelled abroad for work, but now with the use of the Internet and ever-evolving technology, business can often be conducted from the comfort of one’s office or home (Friedman & Berthoin Antal, 2005). And although companies may want to send managers abroad to supervise projects or operations, managers do well to start their international assignments by learning to function in virtual teams while still in their nations of origin (Rifkin, 2006). Thus, intercultural understanding and competence are needed now more than ever. Therefore, hospitality and tourism students, the future global leaders of the industry, benefit from gaining intercultural competence during their academic careers (Bedeckovic, Bosnic, & Jakovic, 2014). Arguably study abroad experiences help students cultivate intercultural competence, but the National Association of International Educators (NAFSA) estimates that only 1% of students in the United States (U.S.) traveled abroad during the 2011 -2012 school year for academic reasons (NAFSA, 2013). Hence, fostering intercultural competence to help future managers and leaders communicate effectively on the global stage requires educators to develop alternative methods for students to experience learning opportunities that help them acquire intercultural communication skills. Therefore, this innovation describes a semester-long course in tourism that involved students from three universities in three different countries sharing live virtual classroom experiences and completing significant group projects in small virtual groups to help students develop intercultural competence.

## DESCRIPTION OF THE STRATEGIES USED AND THE RESULTS OF THE PROJECT

This case recounts the adventures of a class of 14 hospitality and tourism students from the U.S. and their experiences working with a class of 7 students in Mexico and 16 students in Kyrgyzstan. This course involved the following elements of instructor and student collaboration:

- Instructors shared the responsibilities of presenting course material to students;
- Instructors collaborated outside of class to develop the project, lectures, slides, and handouts for the students;
- Students listened to the same lectures via live virtual class links and then met in live virtual groups during class time to discuss the lecture topics;

- Students collaborated outside of class via virtual methods to create a slide presentation and presented their group projects to the entire group via a live virtual meeting.

Students were divided into groups composed of one to three students from each school, two students per school if possible, for groups of six or seven. The steps involved in the group project included the following:

1. Select topics, trends, and issues as assigned;
2. Research topics, trends, and issues as assigned during local time;
3. Discuss the topic, trend, or issue during links as directed;
4. Write a short summary about the topic, trend, or issue discussed during each link as directed;
5. Create a final group slide show about the trends, topics, and issues; and
6. Present the group slide show to the class during a live link--every group member should participate in the final presentation in some way.

This project was about specific topics, trends, and issues related to tourism. Students were asked to define trends or issues or problems affecting the tourism and hospitality industry and focus on their implications for management. Figure 1 describes the topics discussed in each of the live connections that comprised the basis of the project. After each live link discussion, the students created a brief summary of the main points of their group’s discussion.

Connection 1	Introductions, outline of the group project, & introduction to tourism
Connection 2	Tourism organizations, travel motivations, marketing, promotion, and technology
Connection 3	Culture and diversity, education, and human resources
Connection 4	Security and safety issues in tourism and hospitality
Connection 5	Sustainable tourism and the environment
Connection 6	Connection 6: Sustainable tourism and hospitality practices and development issues
Connection 7	Connection 7: hospitality and tourism product development trends
Connection 8	The future of tourism and the profession
Connections 9 & 10	Final group slide show presentations

Figure 1: Live Connection Topics for Discussion

This link report summarized the major points of the link and what was learned about the trends, topics, and issues from each other in a page or two. Then for their final group slide show, they presented background facts and recommendations concerning the trends occurring or issues facing the global tourism and hospitality industry today. Students used at least three outside references per topic, ideally including one reference from

students from each school. These could include Internet sources, periodicals, books, and interviews.

## RESULTS AND IMPLICATIONS FOR TEACHING AND LEARNING

Students began the class by writing short essays about what they knew about the three countries—the USA, Mexico, and Kyrgyzstan. Their knowledge and perceptions of other countries were limited. After they completed their projects, they wrote reflections about their learning experiences. Not surprisingly, their post-class reflections were rich with content and understanding. As an example, none of the US students knew anything about Kyrgyzstan prior to the project and after they began the project they became more curious about the country and about Mexico and their own country.

In this rapidly changing, complex, global society as the world's citizens connect more frequently and more effortlessly online via social media and become ever more linked socially and economically, intercultural competence is increasingly indispensable. Thus, this collaborative effort has merit as a tool for teaching that is truly collaborative and that offers students and instructors access to an international experience without leaving home.

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# LIKELIHOOD OF RESTAURANT MAKEOVER REALITY TELEVISION SHOW VIEWERS TO DINE AT THE FEATURED RESTAURANT

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## ABSTRACT

*This pilot study explored whether a viewers' likelihood to dine at a restaurant changes after they have viewed the restaurant on a reality makeover show. The results indicate that even though appearing on these shows may be a very tempting proposition, it might not be the most successful marketing strategy for chefs, restaurateurs and owners. The results indicate that being featured on a restaurant reality makeover show does not concretely prove to be either a successful or unsuccessful tactic. Moreover, since the makeover show requires the celebrity chef star to pick apart management philosophies and practices, this seemingly has a negative impact on viewers' willingness to visit, travel over 30 miles and refer the restaurant to friends, family members and coworkers.*

**KEYWORDS:** restaurant, reality television, marketing, behavioral intentions

## INTRODUCTION

In the United States, one million restaurants collectively generate \$709B per year (NRA, 2015). Restaurant marketers, owners, and managers are constantly generating new products, adjusting prices, maximizing distribution channels and creating promotions in efforts to capture more of the \$700B market share. Marketing efforts range from loyalty cards to marketing campaigns. Savvy restaurant marketers strive for press and public relations that will be seen by thousands (even millions) of people such as a stellar review in *The New York Times* or a cooking demonstration on the morning news.

Lately, a new marketing tactic of the restaurant makeover reality show has enabled restaurants to be seen by millions of people on broadcast television stations. FOX TV and The Food Network air shows titled, respectively, *Restaurant Impossible* and *Kitchen Nightmares*. The concept for both shows is based on an intervention with a struggling restaurant, which is typically failing due to unpalatable food, unsanitary kitchens, outdated décor, poor management and/or untrained staff. The cameras arrive at the restaurant to capture the current and unproductive harsh reality. The host swoops in

to rescue the restaurant through a variety of tactics typically including décor changes, new menu additions, staff training, and marketing efforts.

The Food Network's daily viewership is 1.3 million people and *Restaurant Impossible* is their second highest rated show (Kondoloy, 2012). FOX's prime time show, *Kitchen Nightmares* boasts 6 million viewers (Kondoloy, 2012). The show *60 Minutes* reported the cost for a 30-second commercial during primetime ranges from \$100,000–\$400,000 (Weprin, 2010). However, if you participate in a reality television show, your restaurant will receive 42 minutes of free dedicated airtime and your venue will be exposed to anywhere from 1.3–6 million viewers. Taping the shows generates immediate excitement in the local community and creates brand awareness for little to no marketing dollars from the restaurant. Soup to Nuts, a restaurant in the Orlando, Florida area, was featured in an episode of *Restaurant Impossible* with Robert Irvine. Owners of Soup to Nuts recounted the taping and mentioned groupies and fans quickly gathered outside the restaurant to get a view of the inside makeover and the host, Robert Irvine (Gonzalez, 2012). Soup to Nuts owners estimated 200 people were outside the restaurant eagerly waiting for it to re-open (Gonzalez, 2012).

This type of marketing tactic can be tempting. However, *Kitchen Nightmares* visited 105 restaurants in the first seven seasons and 65 are closed, including the aforementioned Soup to Nuts, which closed in May 2013 (Ramsey, 2014). The track record for *Restaurant Impossible* is equally as dismal as over 50% of the featured restaurants are reporting sales are down (Segal, 2012). The harsh reality of these shows depicts uncleanly venues and inept staff that could be deterrents to diners (Barber, Goodman, & Goh, 2010). Knowing these statistics, there is a need to determine if being featured on one of these shows increases or decreases viewer's likelihood to visit the restaurant and/or refer a friend.

## LITERATURE REVIEW

Consumers' perceptions, attitudes and behavioral intentions have been studied for decades. However, as society evolves, new factors contribute and change consumers' perceptions and opinions. In the past five years, scholarly research has proven that trends such as technology and social media have influenced opinions and perceptions of restaurants. A trend that has yet to be analyzed is the relationship between consumer's perceptions and opinions of restaurants and reality television shows about restaurants. With the ever-increasing popularity of television shows depicting the good and bad of restaurants, it is important for the restaurant marketer to know how reality television could influence the likelihood of the viewer to visit and/or refer a friend to the featured restaurant. Scholars have theorized reality television can influence real behaviors such as criminal activity (Chiou & Lopez, 2010). Literature indicates reality television shows influence real perceptions and opinions (Teffeteller, 2009). In addition, studies show reality television is a factor in a consumer's dining decision (Smith, 2012).

Joniak (2001) defines reality television as an "unscripted drama that is half real – using real people – and half unreal – using contrived situations." Barton (2009) studied

689 participants to understand how respondents find gratification in watching reality television show. His study concluded viewers seek gratification in watching reality television by imagining how they would act if placed in the situation of the reality show participants, i.e., vicarious participation. Additionally, viewers seek gratification because they believe the shows are authentic (Barton, 2009), which suggests that people viewing restaurant reality makeover shows imagine how they would react to the service, food and décor before and after the transformation, just as the show depicts actual diners reacting to these same issues.

The Theory of Social Construct dates back to the mid 20<sup>th</sup> century, however in the late 1900's, Ian Hacking's theory that people develop opinions, beliefs, and perception of the world around them based on their social constructs became widely accepted (Coulter, 2001). This provides the foundation that it could be possible for a viewer to develop opinions, beliefs and perceptions about a restaurant if they believe what they are seeing on television is reality. The research of Oliver, a leading authority on customer satisfaction, supports the concept of social constructs and he asserts that consumers can develop a perception about a provider based on information only; an actual experience is not required (Oliver, 1997). This information can influence consumer behaviors in the same way an actual experience can. In addition, the information can generate word-of-mouth discussions about attitudes towards the provider. The research also suggests it is plausible for a viewer of a reality television show about restaurants to form a perception and attitude about the restaurant without actually experiencing dining at the venue. Furthermore, this can influence their decision to dine at the venue and refer a friend.

Personal narratives by Chvasta and Fassett (2003) concluded that reality television shows misrepresent reality. They also concluded that although it is a misrepresentation of reality, the shows do influence real perceptions and opinions (Teffeteller, 2009). Rose and Wood (2005) studied 15 participants over the course of the 2000–2001 television season. They concluded viewers essentially coproduce a reality television show. They assert reality television viewers bridge the unknown gap between authenticity of real life people/situations and manipulated events scripted for television with their own fantasy and imagination based on personal life experiences (Rose & Wood, 2005). This could indicate that if a restaurant reality show depicts an inept server, the viewer will construct their own perception of the situation based on personal experiences with an inept server to blend a hyper-authentic reality.

Crew's (2004) research answers one important question regarding the authenticity of reality shows in the context of the show *Survivor*: He sought to answer the question, "How real is the content of *Survivor* for the audience?" A focus group determined viewers felt although the content of the program was edited and portions were manipulated, it was still an honest reflection of people and events (Crew, 2004). Viewers felt that even despite the lack of script, honest emotions were displayed, and there were genuine elements of surprise. However, participants of the focus group reported that they did not believe the show was a documentary and thus producers have the artistic license to venture beyond truth, accuracy and fairness (Crew, 2005).

Crew's findings suggests that viewers of restaurant reality makeover shows might believe the actors are real and the makeover is an actual event, however, even though portions of the program are edited and manipulated. Papacharissi and Mendelson (2007) support Crew's discovery and found that although reality television shows are heavily edited and created for entertainment purposes, viewers perceive the actions as portrayed by the characters in the show as real and they believe they are watching real drama unfold before their eyes. For this reason, it can be theorized that people who view restaurants on reality television will believe the content is accurate and will formulate perceptions about the restaurant.

Other research suggests viewers of reality television shows are watching reality shows in efforts to possibly construct reality and form real life perceptions. Ebersole and Woods (2007) conducted a study with 530 participants to determine motivations for viewing a reality-based television program. This study was helpful in determining whether or not people watch reality television shows in hopes of gaining clarity as to whether or not they should dine at a featured restaurant in a reality show. Ebersole and Woods (2007) found the most substantial motivation for viewing a reality based television program is "personal identification with real characters." Other motivations included entertainment, mood change and vicarious participation (Ebersole & Woods, 2007). This supports the suggestion that viewers of restaurant reality television shows identify with the characters as they are also real life restaurant diners and they vicariously participate in the show by mentally thinking about whether they would dine at the featured restaurant. Another research study supports the concept that people develop perceptions and opinions of the world around them based on reality television (Teffeteller, 2009). Teffeteller surveyed 211 people and tested 14 hypotheses. She identified four genres of reality television, including makeover television. Teffeteller's research supports the construct that reality television can affect the perception of the viewer. Her research indicates opinions positively correlate with ideals perpetuated in reality television. For example, the reality show called "The Bachelor" suggests that love at first sight and destiny occurs among contestants. Teffeteller's research concluded that there is a correlation between watching "The Bachelor" and belief in destiny.

Chiou and Lopez (2010) theorized that reality television can influence crime rates. They conducted a study analyzing crime statistics in the town of Laguna Beach, California prior to the debut of the reality show entitled *Laguna Beach: The Real Orange County*, and after the show debuted, with the city of Dana Point, California as a control. The researchers found suggestive evidence that documented crime activities including non-residential burglaries, auto thefts and rapes increased during the period following the debut of *Laguna Beach*. The authors concluded that increasing the profile and awareness of a city through reality television might draw negative consequences, such as higher crime rates (Chiou & Lopez, 2010).

Lenciono (2012) identified four common factors among failing restaurants depicted in the reality television show and real life unhealthy organizations: Distracted leaders, ambiguous staff direction from leaders, too many aimless initiatives, and that the

organization needs to be refreshed. His conclusions offer support to the changes Robert Irvine makes to restaurants during his show.

Many of the restaurants participating in a restaurant makeover show are looking to build brand awareness. Lozito (2004) analyzes how restaurants create brand awareness and image. His discussion is of value as it depicts the importance of having a strong brand at all touch points; a reality television show is considered a touch point. He discusses how every touch point aids in developing the brand for potential guests. This begins with the first time a potential guest sees a logo, advertisement, or restaurant name. Restaurant servers are pivotal touch points for the brand as they are expected to live the brand and portray the brand to their guests in every transaction (Lozito, 2004). The author does not specifically link research of brand image to willingness to dine at a location, but the importance of maintaining a strong brand at all touch points is conveyed. Angelsmith, a digital marketing agency, conducted research to further explore brand awareness and factors that influence consumer's dining decisions. Respondents reported the biggest influence of their dining decision is a referral from a trusted family, friend, or coworker; this topped the list as 49.8% of (Smith, 2012). However, only 1.7% of respondents stated a *Food Network* show influenced their dining decisions (Smith, 2012).

Ryu, Han, and Kim (2008) identified predictors of customers' behavioral intentions in casual restaurants. They concluded the restaurant's image, perceived value, and customer satisfaction are significant predictors of customers' behavioral intentions (Ryu, Han & Kim, 2008). Their study identified managerial, and specifically marketing implications, related to importance of protecting the company's image. Study results suggest restaurateurs should strive to improve customer satisfaction, perceived value, and restaurant image as these factors can determine the intent to revisit the restaurant and willingness to recommend (Ryu, Han & Kim, 2008). This further supports that restaurants need to protect their image and brand when being featured on a restaurant makeover reality television show.

## METHODOLOGY

Quantitative research was conducted using a 5-point Likert-scale questionnaire in which "1" indicated "strongly disagree" and "5" indicates "strongly agree" to the various questions pertaining to cleanliness, staff competence, and likelihood to visit and refer a friend (see Table 1), on both *before* viewing the respective makeover show (coded in the data set with a "b" along with root variable name and *after* viewing (coded in the data set with an "a" along with the root variable name). The survey was designed to ensure validity, reliability and clarity of questions by following Barber et al.'s (2010) research on repeat patronage.

**Table 1: Likert-scale statements and variable names**

The restaurant dining room is clean	Clean
The restaurant staff members are hygienic	Hygienic
There are less than 5 health code violations at the restaurant	Code
The restrooms are clean	Restrooms
The servers are capable of meeting guests' needs	Servers
The management team is capable of addressing guests' concerns	Mgmt
The kitchen staff is capable of preparing a meal according to the recipe	Recipes
I will visit the restaurant in the next 6 months if I am within a 5-mile radius of the venue	Visit
I will travel more than 30 miles to visit this restaurant within the next year	Travel
I will refer a friend, family member or coworker if they will be within a 5-mile radius	Refer

The research focus was eventually narrowed down to specifically analyze if watching a reality makeover television show about a restaurant will change the viewer's likelihood to visit in the restaurant in the next six months if they will be within a 5-mile radius, travel more than 30 miles to visit the restaurant within the next year, and thirdly, to refer a friend, family member or coworker to the restaurant if they will be within a 5-mile radius. The final data analysis used one of the three aforementioned Likert-scale statements as the dependent variable: Likelihood to visit in the restaurant in the next six months if they will be within a 5-mile radius. Seven Likert statements coded as Clean, Hygienic, Code, Restrooms, Servers, Mgmt and Recipes, were used as the independent variables to measure if participant perceptions influenced future likelihood to dine at a restaurant featured on a reality television show.

A convenience sample of volunteers was drawn from the first author's network of culinary students and colleagues. They were asked to participate in the one-hour study. The questionnaire was designed and deployed using SurveyMonkey. A total of 129 participants started the survey, but only 63 completed all questions. Completed surveys include the completion of four stages. In stage one, participants were given a link to a restaurant's website and were allowed to familiarize themselves with the venue via the website as they would in ordinary life (Smith, 2012). In stage two, participants were asked a series of 10 Likert-scale statements adopted and adapted from Ryu, Han and Kim's (2008) study on perceived value, customer satisfaction and behavioral intentions in a restaurant setting. In stage three, participants viewed a video of a reality television show depicting the restaurant in stage one. In stage four, participants answered the same questions from stage two pertaining to the restaurant.

Participants were randomly assigned one of two surveys: Survey 1 featured *Restaurant Impossible's* show featuring Woody's Tupelo Steakhouse Restaurant. Survey 2 featured *Kitchen Nightmares show* featuring Capri Restaurant. Of the 63 completed surveys, 34 volunteers completed Survey 1/ Restaurant Impossible/Woody's Tupelo Steakhouse and 29 volunteers completed Survey 2/Kitchen Nightmares/Capri Restaurant.

## RESULTS

Thirty participants were between the ages of 20–35 years of age, 25 participants were between the ages of 36 -50, and 8 participants were over the age of 50. Forty-two participants were female and 21 were male. The ethnicity of the participants was primarily Caucasian (81%), but did include Hispanic (3.2%), African American (7.9%), Asian (1.6%), Native American (3.2%) respondents. Thirty-eight participants listed themselves as married, while 25 participants listed themselves as single. Education varied from high school to advanced degrees.

### Data Analysis

In order to assess pre- and post-viewing participant willingness to visit, travel to and recommend the restaurants, paired sample t-tests were performed on the *before* and *after* variable pairs (Table 2).

**Table 2: Paired samples t-test based on willing to visit, travel and refer before and after viewing makeover show**

Variable	t-value	df	Sig. (2-tailed)
Visit	0.457	62	0.649
Travel	1	62	0.321
Refer	1.031	62	0.306

These paired samples t-tests revealed no significant differences on pre- and post-viewing in the willingness to visit, travel and recommend the assigned restaurant. Subsequently, to identify the relationship between participant perceptions after viewing the makeover videos and the willingness to refer, regression analysis was conducted using the variable “Refer after” as the dependent variable and the other “after” variables as independent variables.

**Table 3: The effect of participant perceptions of various restaurant features and staff on willingness to refer after viewing makeover show.**

		B	Std. Error	t	Sig.
1	(Constant)	-0.324	0.373	-0.869	0.389
	Clean After	0.211	0.177	1.196	0.237
	Hygenic After	0.08	0.173	0.463	0.645
	Code After	0.124	0.161	0.766	0.447
	Restrooms After	-0.031	0.149	-0.208	0.836
	Servers After	0.019	0.127	0.15	0.882
	Mgmt After	0.478	0.186	2.567	0.013
	Recipes After	0.135	0.137	0.98	0.331
a. Dependent Variable: Refer After					

Table 3 shows the results of regression. Although the overall model was not viable or significant with a  $P > 0.05$ , there was one significant independent variable: Mgmt After, with a significant P-value of 0.013.

## DISCUSSION

The purpose of this study was to research the perceptions, attitudes and behavioral intentions of viewers of restaurant makeover reality television shows. Marketers are constantly determining the best methods to reach target guests. The recent popularity of restaurant rescue shows such as *Restaurant Impossible* and *Kitchen Nightmares* raises the temptation to be featured on one of these shows. Many restaurant operators could assume the instant fame will bring in guests to shore up a failing or struggling enterprise. However, the unfortunate reality of rescue shows is the makeover depicts a harsh reality of the restaurants in the beginning of the show. As the literature review suggested, consumers base their dining decisions on a number of factors that include referrals, prior experiences, and online research, as well as perceptions of restaurant cleanliness and perceptions of staff capabilities.

However, as revealed through the paired sample t-tests, there was no statistical difference between pre- and post-viewing scores. Specifically, watching a reality makeover television show about a restaurant did not statistically influence the viewer's likelihood to visit in the restaurant in the next six months if they will be within a 5-mile radius. Watching the reality makeover show did not statistically influence their willingness to travel more than 30 miles to visit the restaurant within the next year. Finally, viewing the show did not statistically influence viewers to refer a friend, family member or coworker to the restaurant if they will be within a 5-mile radius. This suggests restaurants are not guaranteed either an increase or decrease in diners after the show has aired. In other words, being featured on a restaurant reality makeover show does not prove to be either a successful or unsuccessful tactic.

Although the overall results of regression were not significant (Table 3), the results show that the perception of restaurant management after viewing the video does have an impact on viewers. It is often the case that failed management philosophies and practices are highlighted and picked apart by the makeover hosts in the process of helping the restaurant. Drama sells, so on-screen criticism is inevitable, but savvy customers may understand that the ultimate responsibility of whether a restaurant is successful or not lies with management. In the end, the attitudes and actions of the chefs, restaurateurs and owners may be more important than other factors such as cleanliness and service quality.

These results may give restaurant stakeholders pause when weighing the pros and cons of deciding whether to go on a makeover show. Firstly, appearing on a makeover show may have little or no impact on influencing a viewer's willingness to visit, travel and recommend the restaurant, and secondly, it may negatively influence the viewer by letting them see management flaws and failures. However, the impact of reality shows on viewers warrants further investigation.

## LIMITATIONS

Limitations to this pilot study include the use of a convenience sample. A larger purposive sample of participants could strengthen or produced different results. Also, the

majority of the 66 volunteers who did not complete the survey did not make it past stage three which required them to watch a 42-minute long video. This suggests that the total length of the survey was too much of a time commitment, so future research should seek to improve the research design by shortening the overall time commitment. Additionally, to strengthen the results, a 7-point Likert scale might better define and refine responses. Finally, the questions used to operationalize Travel and Refer were improperly set up as double-barreled questions, so those two variables were not used for regression analysis. This error would need to be corrected in future surveys.

## CONCLUSIONS

As indicated by the literature review, there are a number of proven tactics that impact a consumer's decision to dine at a restaurant. The results of this study indicate being featured on a restaurant reality makeover show will not significantly influence consumers' dining decisions. The results have practical and theoretical applications that can be considered as chefs and restaurateurs create their marketing strategies. If a restaurant is presented with the opportunity to be featured on a reality makeover television show, they should consider their goals. If a goal is to increase business, the chef or restaurateur should not assume being featured on the show will increase business as the research suggests restaurants are not guaranteed either an increase or decrease in diners after the show has aired. The results bring to light possibilities for new theories which consider the impact of guests witnessing management team members' flaws and failures. Results show that the perception of restaurant management does have an impact on viewers. It is often the case that management philosophies and practices (oftentimes failed) are highlighted and picked apart by the makeover stars in the process of "helping" the restaurant. Future research could explore the impact that perceived management flaws and failures have on the willingness to dine at the restaurant.

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# CONNECTING AMERICAN AND EUROPEAN TOURISM STUDENTS VIA VIDEOCONFERENCING AND SOCIAL MEDIA FOR INTERCULTURAL LEARNING

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## ABSTRACT

*American students in a global tourism seminar course participated in live class discussions with a group of European students via videoconferencing technology and social media. This presentation will include a) how global and intercultural learning were implemented with virtual connection technology; b) methodology of intercultural competence assessment; and c) results of the measurement regarding specific intercultural learning outcomes produced as a result of this global experience.*

**KEYWORDS:** Global Learning; Virtual Connection; Intercultural Competence.

## INTRODUCTION

In an era of global interconnections and interdependencies, intercultural competence has become more imperative for students to develop (Musil, 2007). An increasing number of educational institutions are seeking ways to cultivate “global-ready students” so that they are able to relate to and interact with people from different cultural and ethnic backgrounds both domestically and overseas (Deardorff, 2008; Spitzberg & Changnon, 2009). A Global Tourism Seminar course was offered at a university in the U.S. which recently added a new international experience for students through virtual global connections. Students in this course participated in live class discussions twice a week with a group of tourism students and faculty in Slovenia via videoconferencing and social media technology. The teaching goal for this international experience was for students from both countries to further develop their intercultural competence.

Researchers suggested that acquisition of intercultural competence requires a developmental process that involves actual intercultural experience and reflection that need to be embedded in intercultural learning activities. The international experience in Global Tourism Seminar involved two videoconferences weekly by which students from both countries discussed topics related to global tourism. In order to extend interactions beyond classroom time, a course management website called CourseNetworking was adopted which included a social networking platform. Students were encouraged to interact on this website, and their discussions were not limited to tourism issues. This venue provided students a more casual environment to share and learn about each other’s culture. In addition, American and Slovenian students were paired in order to interview each other with questions related to tourism and cultural issues. All of these activities

were designed to provide students with a variety of formal and informal ways to connect and engage in intercultural learning.

Given the advanced technology, more and more educators are adopting e-collaboration or virtual connections that provide students with opportunities to gain global learning experience without leaving home. Hence, in recent years, researchers have just begun to assess how this pedagogy helps to improve students' intercultural competence. So far most published research on this topic has been conducted for foreign language learners. More research needs to be done in different disciplines.

Both American and Slovenian students' development of intercultural competence in the Global Tourism Seminar course was measured based on a theoretical framework developed by Deardorff (2008). A list of 15 knowledge, skills, and attitudes (KSAs) that represent intercultural competence were identified by Deardorff (2008) through her research that involved experts in the field of global learning. These 15 KSAs include respect, openness, tolerance for ambiguity, flexibility, curiosity and discovery, withholding judgment, cultural self-awareness/understanding, understanding others' worldviews, culture-specific knowledge, sociolinguistic awareness, skills to listen, observe and interpret, skills to analyze, evaluate and relate, empathy, adaptability, and communication skills.

## LITERATURE REVIEW

For some time, the term "intercultural competence" has been loosely defined in the literature. It has been used interchangeably with intercultural adaptation and intercultural effectiveness (Spitzberg & Changnon, 2009). At times, it was adopted as a subjective evaluative notion, and at other times, researchers discussed it with different sets of components that constitute the concept (Deardorff, 2006; Spitzberg & Changnon, 2009).

Since the 1970s, scholars have begun to develop conceptual models for measuring intercultural competence. Many of these early studies recognized that intercultural competence is a multidimensional concept and requires a comprehensive assessment that includes various elements that constitute the competence. Additional sophisticated theoretical models have been developed since the 1990s. Besides exploring various elements of intercultural competence, these newer models also started to investigate the developmental process of the competence across different contexts (Spitzberg & Changnon, 2009).

In search of a consensus on what comprises intercultural competence, Deardorff (2006) conducted a survey and a Delphi study that included national and international intercultural experts. Deardorff's (2006) study revealed that among a list of proposed definitions, the top rated one defines intercultural competence as "the ability to communicate effectively and appropriately in intercultural situations based on one's intercultural knowledge, skills, and attitudes" (p. 247).

Furthermore, Deardorff's (2006) study produced a list of 15 components that constitute intercultural competence. These 15 components were classified into four

broader categories which are interconnected. Based on these research findings, she developed the Deardorff Process Model of Intercultural Competence that is shown in Figure 1.

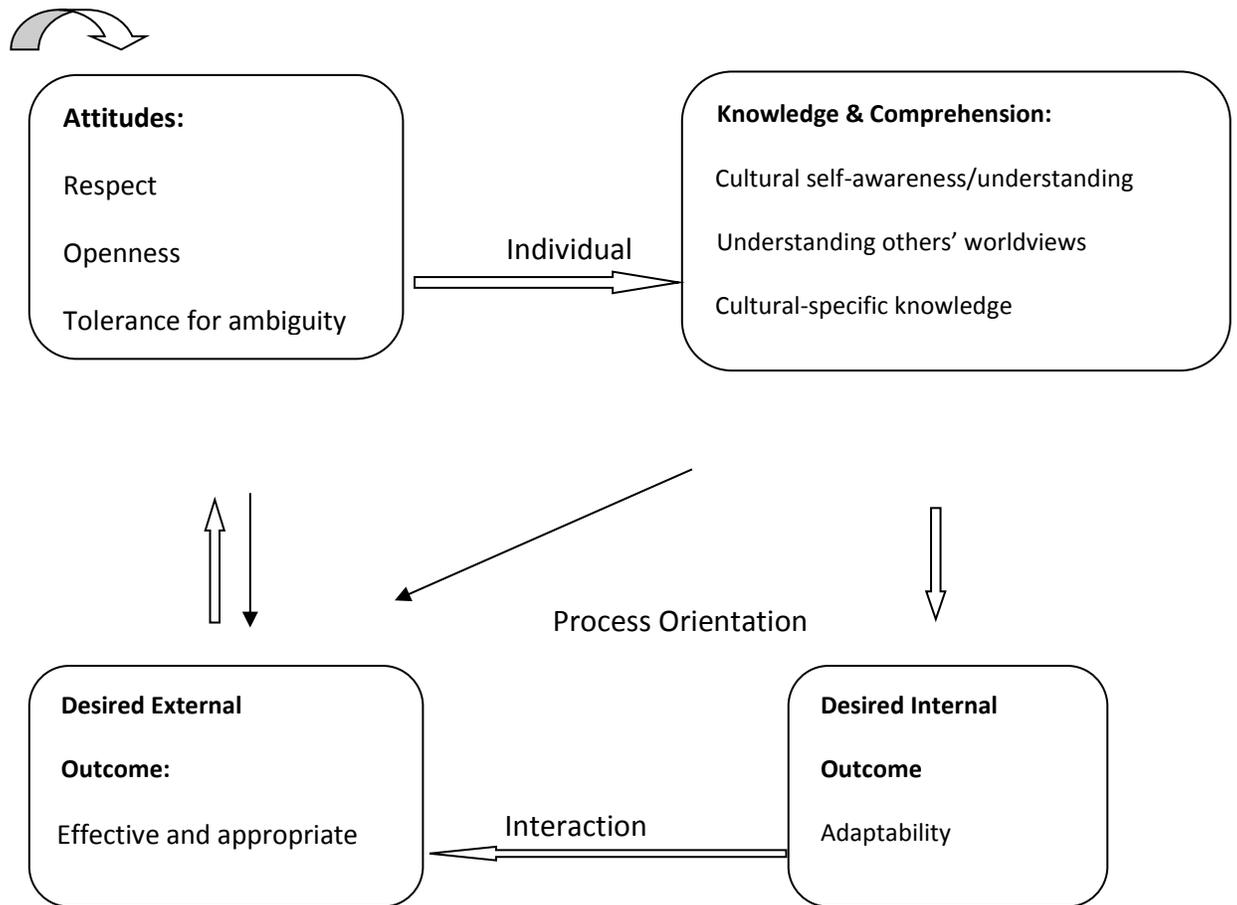


Figure 1. Deardorff Process Model of Intercultural Competence

Source: Deardorff, D. K. (2008). Intercultural competence: A definition, model, and implications for study abroad. In V. Savicki (Ed.), *Developing intercultural competence and transformation: Theory, research, and application in international education* (pp. 297-312). Sterling, VA: Stylus.

The first category in the model is attitudes, which includes five components: respect, openness, tolerance for ambiguity, withholding judgment, and curiosity. Deardorff (2008) suggested that attitudes are fundamental starting points for developing intercultural competence. These attitudes will lead to development of a set of knowledge and skills which falls into the second category in the model. Specific components included in this category are: cultural self-awareness/understanding; understanding others' worldviews; culture-specific knowledge; sociolinguistic awareness; skills to listen, observe and interpret; and, skills to analyze, evaluate, and relate. Deardorff (2008)

stated that these skills and knowledge require critical and analytical thinking in order to process information about different cultures at a deeper level. For instance, students need to go beyond the basic knowledge of foods, customs, and greetings and try to analyze the intricacies of these elements of a culture (Deardorff, 2009). Next, those skills and knowledge in the second category, as well as the prerequisite attitudes, will result in several internal outcomes, which are adaptability, flexibility, and empathy. Subsequently, all the components from the three categories will manifest themselves in observable, external outcomes of effective and appropriate communication and behavior in an intercultural situation (Deardorff, 2008).

These 15 components in the model are necessary for developing intercultural competence. Deardorff's (2006, 2008, & 2009) model suggests that one moves from an individual level of personal attitudes, knowledge, and skills to an interpersonal level of cultural interactions. Deardorff (2006) emphasized that this framework demonstrates the continuing process of intercultural competence development. An individual's attitudes might be altered after gaining more knowledge and skills and interacting with other cultures. Development of intercultural competence can be a life-long journey on which one may never reach the peak.

Deardorff (2006) also indicated that the development of intercultural competence is a dynamic process. It is possible for an individual to go from attitudes directly to the external outcome although the degree of effectiveness and appropriateness of the outcome may be constrained. Any component in the model can be linked to other components directly. Based on the model, Deardorff (2006, 2008, & 2009) provided suggestions for cultivating these components, as well as, methods for assessing intercultural competence. Furthermore, Deardorff and Clayton (2010) developed a self-evaluation instrument for measuring these 15 intercultural competencies. The components are measured on a five-point scale (1= poor; 2 = below average; 3 = average; 4 = high; 5 = very high).

## METHODOLOGY

In the beginning of the global dialogue experience, all students were asked to self-evaluate their intercultural competence with the instrument developed by Deardorff and Clayton (2010). Deardorff and Clayton's (2010) instrument was kept entirely as is. The 15 elements of intercultural competence were measured on a five-point scale (1 = poor; 2 = below average; 3 = average; 4 = high; 5 = very high). Students were asked to rate themselves on the 15 components of intercultural competence.

The second intercultural competence measurement was conducted at the end of the semester. In order to gauge the impact of the global experience on students' development of intercultural competence, Deardorff and Clayton's (2010) measurement scale was altered slightly for the second and third evaluations in order to fit the needs of this study. All 15 constructs were kept the same but were measured with a different scale. The students were asked to rate the improvement in their competence on a different five-point scale (1 = very low; 2 = somewhat low; 3 = moderate; 4 = somewhat high; 5 = very

high). Additionally, for each intercultural competence element, the students were asked to explain their rating by providing specific rationales and/or examples. The methodology used in this study heled to collect quantitative and qualitative data. A total of 33 American and 17 Slovenian students participated in the measurements. After data collection, mean scores of the 15 KSAs were calculated. T-tests were performed to measure if there is a significance between the first and second measurements for both groups of students. In addition, students' written comments on the 15 KSAs were reviewed.

## RESULTS AND DISCUSSION

These 15 KSAs of intercultural competence were measured both quantitatively and qualitatively in this seminar course by collecting data from students' learning reflections. Table 1 shows the mean scores of the 15 KSAs for both measurements. The mean scores of the two measurements were quite high for both American and Slovenian students. For several items, the second measurement was significantly lower than the first one. One explanation is that students may overrated their intercultural competence for the first measurement given that they did not have to explain their ratings. After involving in intercultural exchange through the global connection in the class, students may have more understanding and personal experience about the 15 KSAs and were able to provide more accurate ratings.

Table 1. Results of Intercultural Competence Measurements

	American Students			Slovenia Students		
	1 <sup>st</sup> measurement	2 <sup>nd</sup> measurement	Significance	1 <sup>st</sup> measurement	2 <sup>nd</sup> measurement	Significance
Respect	4.81	4.19	0.000*	4.60	3.91	0.088*
Openness	4.56	4.42	0.104	4.37	3.82	0.871
Tolerance for ambiguity	4.13	3.87	0.007*	3.80	3.64	0.211
Flexibility	4.16	4.29	0.034*	4.19	3.45	0.413
Curiosity and discover	4.53	4.35	0.127	4.44	3.90	0.640
Withholding judgment	4.25	4.13	0.278	4.13	3.00	0.923
Cultural self-awareness/understanding	4.22	4.19	0.527	3.88	3.55	0.225
Understanding others' worldviews	3.94	4.00	0.377	4.00	3.82	0.054*
Culture-specific knowledge	3.47	3.97	0.884	3.19	3.64	0.785
Sociolinguistic awareness	3.22	3.55	0.221	3.81	3.91	0.149
Skills to listen, observe and interpret	4.37	4.29	0.494	4.06	3.64	0.303
Skills to analyze, evaluate, and relate	4.25	4.19	0.559	3.87	3.09	0.897
Empathy	4.62	3.94	0.000*	4.25	3.45	0.001*
Adaptability	4.25	4.33	0.591	4.06	3.64	0.129
Communication skills	4.22	4.26	0.606	3.94	3.91	0.285

Note: Items were measured on a 5-point, Likert-type scale ranging from 1 (strongly disagree) to 5 (strongly agree).

\*Level of significance using t-test

The qualitative part of data shows that the virtual global connection offered them a chance to see what others think about their culture. It increase their curiosity which made them want to learn more about each other's culture. In addition, the experience also helped them to reflect on their own culture and nation.

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## BALANCING INTERNATIONAL TOURISM AND DISEASE SPREADING

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### ABSTRACT

*This paper aims at formulating an answer to the question of what moral demand the UNWTO World Tourism Organization places on governments, and what the ensuing moral responsibilities are, based on the Global Code of Ethics for Tourism. This question focuses specifically on the case of preventive health protection inherent in tourism and travel. In this case, I explore how the moral responsibilities to prevent spreading of infectious diseases by travel and tourism can be balanced with the facilitation of maximum freedom of travel. Does the moral demand that governments ought to protect the health of their citizens, in order to minimise the burden of the disease on society, outweigh the facilitation of maximum freedom of travel?*

**KEYWORDS.** Disease spreading; Freedom of travel; Health Protection; Moral demand; Responsibility; UNWTO Global Code of Ethics for Tourism.

### INTRODUCTION

*"When we think of the major threats to our national security, the first to come to mind are nuclear proliferation, rogue states and global terrorism. But another kind of threat lurks beyond our shores, one from nature, not humans – an avian flu pandemic."  
(Barack Obama, 2008)*

In the past two decades, international travel and tourism have grown tremendously to a widespread social and global phenomenon that plays an unprecedented role in the economies of many countries.<sup>1</sup> Despite recent events and challenges that have complicated its operating environment, the industry continues to grow. Induced by globalisation, a growing number of countries – large or small, rich or poor – opt for the development and promotion of their cultural and natural resources, in order to benefit from travel and tourism. They consider tourism as a quick and easy solution to generate income. However, the development of tourism has also presented several moral dilemmas, for instance, with regard to health related issues inherent to tourism and travel.

Instigated by the observation that the immense growth of tourism required a fundamental frame of reference for the responsible and sustainable development of tourism, the UN World Tourism Organization (UNWTO) has formulated and accepted the Global Code of Ethics for Tourism (GCET). The following endorsement of the

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<sup>1</sup> In 2014, international tourist arrivals reached 1,138 million, a 4,7% increase over the previous year. (UNWTO World Tourism Barometer, January, 2015).

General Assembly of the United Nations for the implementation of the Code of Ethics has given the initiative important momentum and a high-level profile, appealing to governments as their first addressee. It expects them not only to acknowledge and accept the code, but consequently to implement and uphold the code, to encourage “morally good tourism” and to prevent immoral tourist behaviour and activities.

This paper will be an exploration of the question of what moral responsibilities flow from the UNWTO Global Code of Ethics for Tourism to governments to prevent spreading of infectious diseases by travel and tourism. The case of preventing infectious disease spreading by travel and tourism is not a clear-cut and evident case, but rather a diffuse dilemma. On the one hand, the Code of Ethics implies that individual travellers ought to act in a responsible manner and protect themselves and others (at home and in the destinations) from health risks. Additionally, tourism professionals and public authorities have similar responsibilities to safeguard the health of travellers and to prevent spreading of infectious diseases. On the other hand, the UNWTO World Tourism Organization fosters facilitation of maximum freedom of travel, which would be conflicting with certain measures to limit travel by imposing travel restrictions. This places public authorities in a dilemma of how to balance the moral responsibilities to prevent spreading of infectious diseases by travel and tourism with the facilitation of maximum freedom of travel.

Several reasons struck me in particular to decide this dilemma is important: (1) infectious diseases still account for 33 percent of the mortality throughout the world; (2) the emergence of old and new infectious diseases are placing international travellers, their homeland and host populations at risk within and outside national borders; (3) the pandemic influenza H1N1 2009 has had a large impact on tourism and travel and occasionally, it seems to have led to overreaction; (4) the **2014 West Africa outbreak of Ebola Virus Disease has** claimed thousands of lives, **and it has caused a disproportionate decline in international tourism to Africa.**

In order to clarify the issue at hand, I will first discuss the role of travel and tourism as a vector in transmitting infectious diseases. Secondly, I will shortly describe several aspects of infectious diseases (in particular H1N1 and Ebola), the risk of epidemics or pandemics, and the issue of health protection (preventive measures to avoid spreading of infectious diseases). Finally, I will ascertain what moral demands in this context are placed by the UNWTO on governments, based on relevant moral considerations concerning preventive measures with regard to health protection, and what the ensuing moral responsibilities based on the GCET are.

## TOURISM AS A VECTOR FOR DISEASE SPREADING

In a globalised world, travel, mobility and migration are increasingly part of the lives of millions of people, as well as a vital aspect in the viability of many economies. The explosive growth of international travel for reasons of business and pleasure presents us with great economic and social benefits, but also potentially dangerous consequences regarding the inevitable spread of infectious diseases across international frontiers. After

all, infectious diseases do not stop at borders. Population movements appear to be instrumental in the global domino-type spread of old, new and re-emerging infectious diseases.<sup>2</sup> Nearly any place in the world can be reached within 36 hours, which is less than the incubation period for most infectious diseases. Infectious micro-organisms can spread from person to person directly or to vectors at the traveller's destination.<sup>3</sup> Nowadays, medical emergencies in travel are a far greater threat than crime or terrorism, and most of these medical problems are experienced when visiting developing nations.<sup>4</sup>

An example is the 2008 San Diego outbreak of measles that was caused by a California family after their trip to Switzerland.<sup>5</sup> The 7-year-old boy, who was not vaccinated, was infected with measles in Switzerland and upon return in San Diego, he thereby exposed people in his community and caused an outbreak of measles. Obviously, the unvaccinated boy was instrumental in the outbreak and thus responsible for causing harm to others. In this context, several facts can be distinguished: (1) individuals that are not vaccinated may become infected while travelling, and introduce non-endemic diseases back into the communities in their homeland; (2) their infection will cause harm to vulnerable individuals in their communities if they become infected. The question arises of whether this harm could be avoided and what preventive measures are justifiable.

As cross-frontier travel is instrumental in the spread of infectious diseases, and the increasing ease and speed of travel has led to a parallel ease and speed of transmission of diseases, international travellers have a responsibility to be aware of the health and security risks inherent in any travel outside their usual environment and to take appropriate health precautions, as laid down in the Global Code of Ethics for Tourism Art. 1.6.<sup>6</sup> In practice, this implies that, well before departure, travellers and tourists should obtain information about the occurrence of any infectious diseases or any recent disease outbreaks in their destination countries. Additionally, they ought to take appropriate health precautions (i.e. recommended vaccinations) to minimise the risks of catching or transmitting an infectious disease. Obviously, not every country poses an equal health risk for travellers, but especially in tropical countries in Africa, the Middle East, Asia, and Latin America, diseases exist that are not (or no longer) found in most Western countries, for example cholera, dengue fever, malaria, rabies, typhoid fever, and yellow fever. Furthermore, unforeseen natural or manmade disasters may occur;

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<sup>2</sup> Travel is a catalyst the spread of new diseases. Moreover, old diseases are carried from one area of the world to another.

<sup>3</sup> www.cdc.gov

<sup>4</sup> Richter (1999): 1-4.

<sup>5</sup> D.W. Steele (2009) *Obligations to Limit Travel for Individuals with Personal Belief Exemptions and an Extended Discourse on Arguments Related to the Mandatory Immunization Debate*. Master thesis Applied Ethics, Utrecht University. The boy was not vaccinated because of a personal belief exemption (PBE), but this does not alter the fact that he was instrumental and thus responsible for the outbreak.

<sup>6</sup> GCET, Art. 1.6 (1999): "Tourists and visitors have the responsibility to acquaint themselves, even before their departure, with the characteristics of the countries they are preparing to visit; they must be aware of the health and security risks inherent in any travel outside their usual environment and behave in such a way as to minimize those risks."

outbreaks of known or newly emerging infectious diseases, such as Ebola, SARS, MERS, are often unpredictable.

To avoid a possible pandemic, personal responsibility is an important step that travellers can make to protect their own well-being, as well as the well-being of those around them. It should be noted that travel vaccination policies usually depart from particular hazards to personal health, recommending health precautions because they protect the individual traveller from developing an infectious disease in a foreign environment. These recommended vaccinations do not specifically take into account the role travellers play as vectors in transmitting an infectious disease and putting people at risk that surround him (in a destination country as well as their homeland). Only when a vaccination is mandatory (e.g. yellow fever), this obligation stretches to a traveller's responsibility as a possible carrier.

In addition to travellers, tourism professionals (i.e. travel agents, tour operators, and airline and shipping companies) and public authorities have an important responsibility regarding health protection of travellers, as follows from the UNWTO Global Code of Ethics in Tourism Art. 6.2.<sup>7</sup> In order to safeguard the health of travellers, they should give relevant health advice, for example if a destination presents any particular hazards to personal health and what the appropriate precautions are.

The demands the aforementioned GCET-articles place on governments to prevent spreading of infectious diseases, especially when they limit travel (e.g. imposing travel restrictions), confront these governments with a dilemma, because these demands would be conflicting with the liberty to move and the maximum freedom of travel that is fostered both by the United Nations and the World Tourism Organization UNWTO, as stated in the Global Code of Ethics in Tourism Art. 8.1<sup>8</sup> and 8.4.<sup>9</sup>

The question arises of how measures to prevent disease spreading or global outbreaks of infectious diseases can be balanced with the liberty to move and the freedom of travel. I will get to this after giving some background information on infectious diseases, epidemics and pandemics, and preventive measures to avoid spreading of infectious diseases.

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<sup>7</sup> GCET, Art. 6.2 (1999): "Tourism professionals, insofar as it depends on them, should show concern, in co-operation with the public authorities, for the security and safety, accident prevention, health protection and food safety of those who seek their services."

<sup>8</sup> GCET, Art. 8.1 (1999): "Tourists and visitors should benefit, in compliance with international law and national legislation, from the liberty to move within their countries and from one State to another, in accordance with Article 13 of the Universal Declaration of Human Rights."

<sup>9</sup> GCET, Art. 8.4 (1999): "Administrative procedures relating to border crossings whether they fall within the competence of States or result from international agreements, such as visas or health and customs formalities, should be adapted, so far as possible, so as to facilitate to the maximum freedom of travel and widespread access to international tourism."

## INFECTIOUS DISEASES

An infectious disease, or so-called ‘germ disease’, can be defined as an illness that is caused by the invasion of the body by microorganisms (e.g. viruses, bacteria, fungi) which grow and multiply there, and can be transmitted only by a specific kind of contact. A contagious or communicable disease is an illness that can be communicated directly from one person to another. A disease may be infectious, but not all infectious diseases are necessarily contagious (though a contagious disease is always infectious). The distinction depends on the transmission of the living germs (for example direct contact with a patient suffering from the disease, or with some secretion of, or object touched by, such a patient).<sup>10</sup>

An epidemic can be described as the occurrence in a community or a region of cases of an illness, specific health-related behaviour or other health-related events clearly in excess of normal expectancy. An epidemic disease is any infectious disease that develops and spreads rapidly to many people.

A pandemic is an epidemic of an infectious disease, occurring worldwide or over a wide area crossing international boundaries, and affecting a large number of people.<sup>11</sup> In general, pandemics are associated with high morbidity, excess mortality, and social and economic disruption.<sup>12</sup> It is not a new phenomenon, as in the past few centuries, the world has experienced many pandemics, with an average of three pandemics per century, occurring at intervals of one to five decennia. Well-known examples are the Plague Pandemic of the fourteenth century known as the Black Death, the Cholera Pandemics in the nineteenth century, and the Great Influenza Pandemic which coincided with the end of World War I.<sup>13</sup> Generally, these pandemics were announced with a sudden explosion of cases, and took the world by surprise. In the twentieth century, such pandemics occurred in 1918 (Spanish Flu), 1957 (Asian Flu), and 1968 (Hong Kong Flu).

At the dawn of the third millennium, the threat of a pandemic is more imminent than ever since 1968. First of all, specialists in infectious diseases have observed that various contemporary factors may stimulate the increase of new pandemics, for example the evolution of the pathogen (e.g. antibiotic resistance, increased virulence), international travel, international trade, and global warming. In the past few decades, a variety of infectious diseases with pandemic potential has occurred at an increased frequency,

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<sup>10</sup> Examples of non-contagious infectious diseases are diseases that may be transferred by vectors (usually insects or other animals), for example mosquitoes that transmit malaria, ticks that can carry Lyme disease, bats or dogs that can carry rabies [www.britannica.com].

<sup>11</sup> WHO (2007): v-vii (glossary).

<sup>12</sup> In the context of the mild pandemic H1N1 2009, tourism professionals have raised a concern that the simple use of the term ‘pandemic’ is not to be recommended as it is often associated with a scenario different to the current mild H1N1 virus [UNWTO (2009)].

<sup>13</sup> The 1917-1918 influenza epidemic served as a cautionary tale of how the movement of travellers (in this case primarily soldiers) could unleash deadly terror on civilian populations and their unprepared governments. Between 20 and 30 million people died, far more than from World War I fighting [Richter (1999)].

mainly caused by the growth of air travel.<sup>14</sup> These pandemics include the emergence of the human immunodeficiency virus (HIV) in the 1980s, the outbreak of the severe acute respiratory syndrome virus (SARS) in 2002, and the outbreak of measles in Switzerland, Austria and Germany (2006-2008).<sup>15</sup> Recent examples of infectious diseases with an epidemic potential are: (1) pandemic influenza H1N1 2009 (an acute and highly contagious viral infection); (2) Ebola Virus Disease 2014 (a viral infection that is extremely infectious but moderately contagious, because the virus is not transmitted through the air). I will shortly describe the main characteristics of these diseases, because they present a good example of an extremely infectious disease and the way the world dealt with it.

**(A) Pandemic influenza H1N1 2009 – in retrospect**

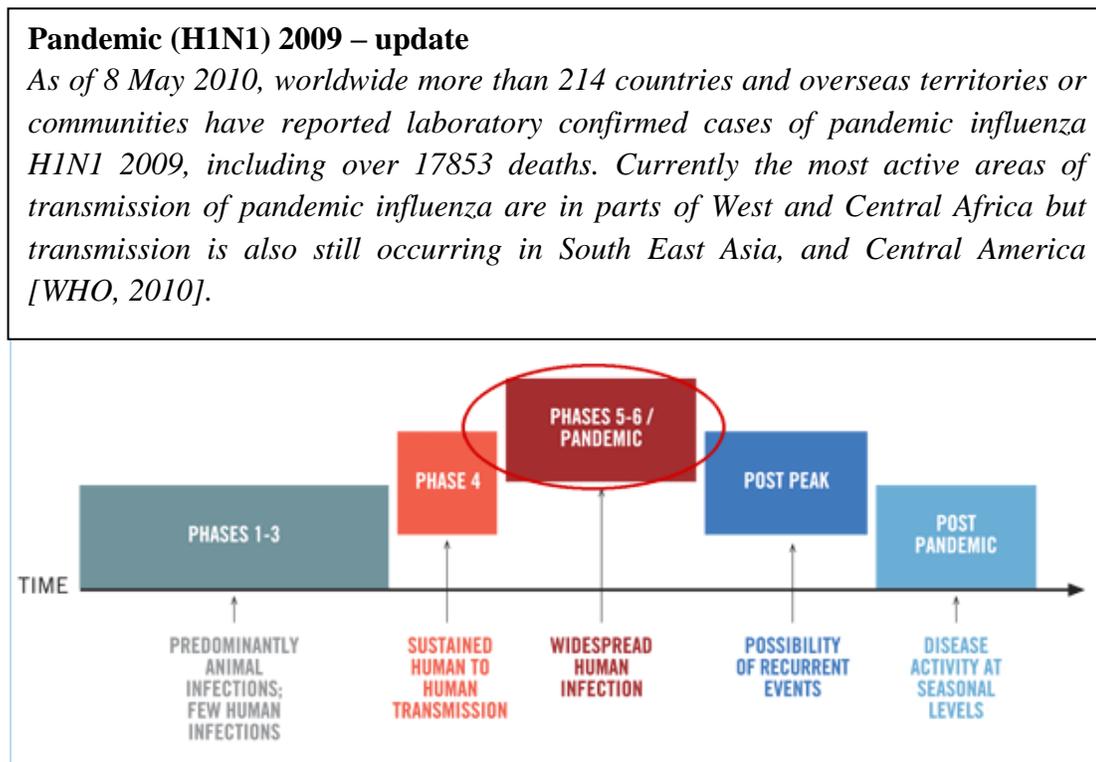


Figure 1. Pandemic Influenza Phases.

In 2009, the world was confronted with an outbreak of a new strain of influenza that could not be contained. On 11 June 2009, World Health Organization WHO officially proclaimed H1N1 a pandemic. This influenza virus appeared to be a new version of the H1N1 ‘swine flu’ sub-strain, a respiratory disease infectious for pigs, but only sporadically to humans – until the new strain showed direct human-to-human transmission. Because the outbreak originated in Mexico, media soon called it ‘Mexican flu’, which stigmatised Mexico and a number of neighbouring Latin American countries.

<sup>14</sup> The pandemics of the previous century encircled the globe in 6 to 9 months, even when most international travel was by ship. Given the speed and volume of international air travel today, the virus could spread more rapidly, possibly reaching all continents in less than 3 months [www.sos.travel].

<sup>15</sup> Gras-Dijkstra (2009): 150-154.

The global panic that broke out sometimes resulted in extreme measures, for example in China, where dozens of Mexican citizens were quarantined by force and deported, even though none of them showed any sign of flu. Flights between Mexico and China were cancelled. Countries closed their borders for Latin American citizens. Airports installed special security gates and used thermal scanners to check the body temperature of incoming travellers. Many countries pursued a policy of determent and issued emergency travel warnings advising citizens not to travel at all, or to travel at their own risk. In Egypt, the government ordered to kill all pigs, because they were suspected of infecting people with swine flu. These examples illustrate the drastic, sometimes even racist measures that may result from a frantic reaction to a pandemic.

**(B) 2014 West Africa Epidemic of Ebola – ongoing**

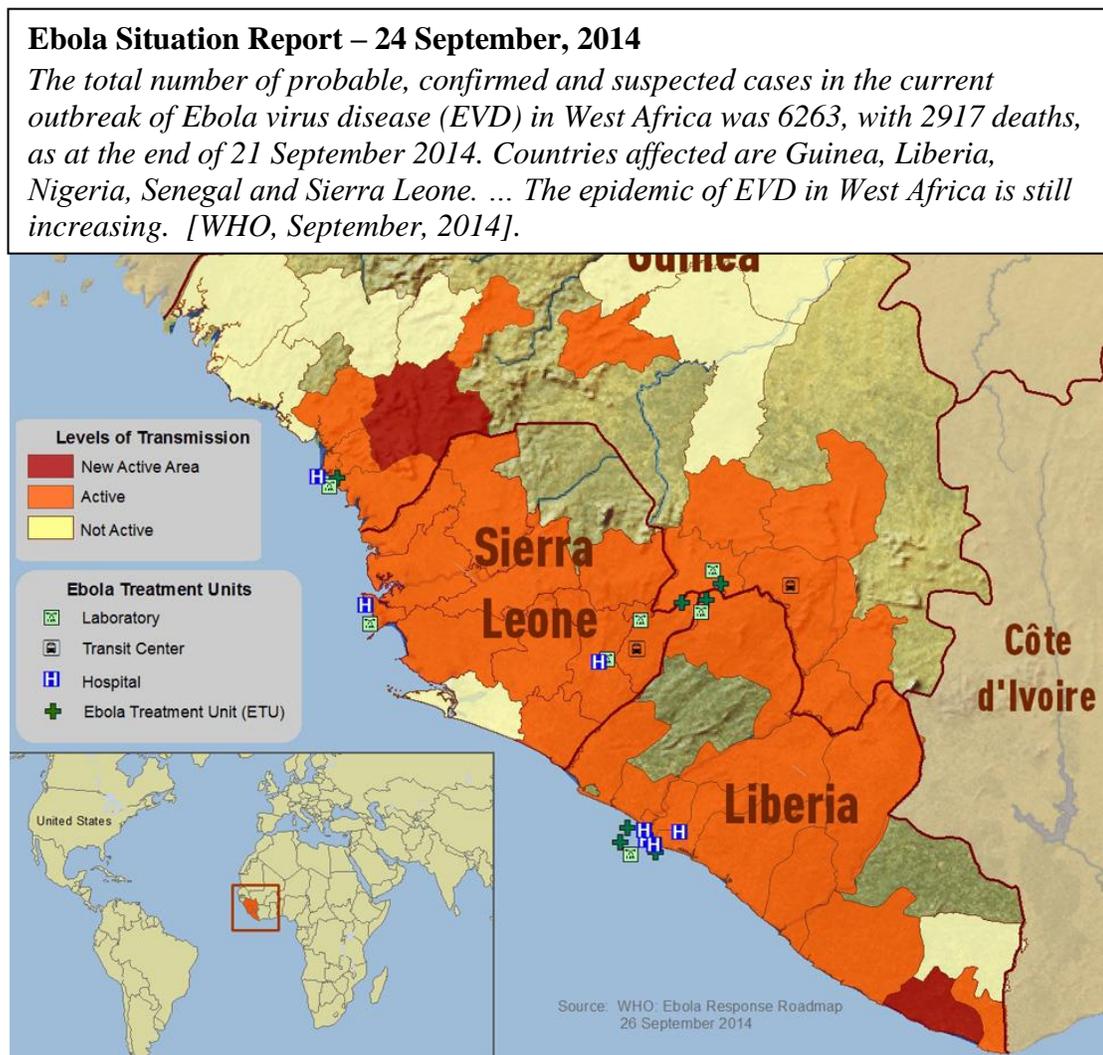


Figure 2. Ebola Response Roadmap (WHO, 26 September, 2014).

**Ebola Virus Disease (EVD)**, formerly known as Ebola haemorrhagic fever, first appeared in 1976 (in Congo and Sudan), but the 2014 outbreak is “the largest, most

complex and most severe outbreak”<sup>16</sup> in history, reaching epidemic proportions and claiming thousands of lives.<sup>17</sup> In March 2014, the first cases were reported in Guinea (West Africa), and soon the disease spread across land borders to the neighbouring countries Sierra Leone and Liberia. It was not until 8 August 2014, though, that the World Health Organization WHO officially declared the West Africa outbreak a Public Health Emergency of International Concern. This declaration sent an international alert so that countries could prepare for any possible cases. WHO recommended exit screening of all persons departing affected countries, but no general bans on travel, or general quarantine of travellers arriving from Ebola-affected countries.<sup>18</sup> The WHO has been widely criticized for its delay in taking action to address the epidemic. This delay in adequately responding to the outbreak has contributed to the failure to control the epidemic. Much time was wasted before the international community started to help containing and preventing further spread of Ebola, and to mobilize foreign aid and action to fight Ebola in affected countries.

## PREVENTIVE MEASURES TO AVOID INFECTIOUS DISEASE SPREADING

Infectious diseases are caused by ‘germs’ and can be transmitted only by a specific kind of contact. This means that protective measures need to be taken to mitigate infectious disease transmission, for example: (1) avoiding contact (e.g. travel restrictions, quarantine, isolation), or by (2) a form of protection of the person that is at risk (immunisation). It should be noted that countries rarely impose measures to limit travel, except in unusual circumstances.<sup>19</sup> Such an exceptional case was, for instance, the outbreak of pandemic influenza H1N1 2009, which mainly resulted in a policy of determent (travel warnings or travel advisories) and occasional travel restrictions, such as closing of borders, quarantine and isolation measures. In general, however, governments seldom impose travel restrictions to avoid spreading of an infectious disease.<sup>20</sup> In this context, it should be noted that the UNWTO Global Code of Ethics for Tourism urges countries to facilitate freedom of travel instead of imposing travel restrictions.<sup>21</sup> This is

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<sup>16</sup> WHO Director-General Margaret Chan, September 2014. [www.who.org]

<sup>17</sup> On 28 June 2015, the Ebola outbreak includes 27,443 cases and 11,220 reported deaths, according to the WHO, though the WHO believes that this substantially understates the magnitude of the outbreak. [www.who.org]

<sup>18</sup> Yet, the Ebola outbreak has had an impact on travel to Africa in general, due to the hysteria covered by media coverage of the outbreak, misperceptions about the transmission of the virus, a misconception that Ebola affects all of Africa, and lack of basic knowledge about geography in Africa.

<sup>19</sup> It may be remarkable that in case of cross-frontier travel of pets (or other animals), health requirements are much more severe than for humans. For animals, vaccination is always mandatory and has to be proved by an International Health Certificate to be completed by a licensed veterinarian. Besides, several countries demand that animals undergo mandatory quarantine for a set period [www.petfriendlytravel.com].

<sup>20</sup> An exceptional case is HIV/AIDS: more than 50 countries have imposed travel restrictions that restrain or ban the entry, stay and residence to persons living with the HIV virus, based on the HIV-positive status alone. Moreover, an increasing number of countries require HIV-screening of foreigners, especially long-term visitors, as part of their medical exam prior to entry [UNAIDS (2010)].

<sup>21</sup> GCET, art. 10.2 (1999): “The stakeholders in tourism development should recognize the role of international institutions, among which the World Tourism Organization ranks first, and non-governmental organizations with competence in the field of tourism promotion and development, the protection of human rights, the environment or health, with due respect for the general principles of international law.”

conflicting with measures to avoid contact, which leaves immunisation as the best alternative.

Fortunately, people are often already protected by their own immune systems that safeguards them against a multitude of infectious agents. Otherwise, immunisation is one of the best lines of defence for vaccine-preventable infectious diseases. Immunisation is the process whereby a person is made immune or resistant to an infectious disease, typically by the administration of a vaccine. Vaccines stimulate the body's own immune system to protect the person against subsequent infection or disease. In general, established vaccines are quite safe, serious adverse reactions are uncommon. Routine immunisation programmes protect most of the world's children from a number of infectious diseases that previously claimed millions of lives each year. Nowadays, the combined vaccines against diphtheria/tetanus/pertussis (DTP) and measles/mumps/rubella (MMR) are in widespread use in children.

With regard to travel and tourism, the WHO booklet *International travel and health 2010* provides useful information on vaccine-preventable diseases, vaccines and immunisation. Vaccines for travellers include: (1) those that are used routinely, particularly but not only in children; (2) others that may be advised before travel to disease-endemic countries; (3) those that, in some situations, are mandatory.<sup>22</sup> The booklet recommends:

*“Any traveller intending to visit a destination in a developing country should consult a travel medicine clinic or medical practitioner before the journey. This consultation should take place at least 4–8 weeks before the journey and preferably earlier if long-term travel or overseas work is envisaged. The consultation will determine the need for any vaccinations and/or anti-malarial medication and identify any other medical items that the traveller may require.”<sup>23</sup>*

As indicated, immunisation constitutes an important means of protecting people from severe infectious diseases. Many infectious diseases that the more developed countries have eliminated are still prevalent in other parts of the world. Therefore, travellers to tropical countries as well as to certain other regions are recommended or compelled to get vaccinated against those infectious diseases that exist in their travel destination.<sup>24</sup> Sometimes, travel companies and embassies will inform travellers that "nothing is needed" (no vaccination certificates are required for entry into that country), but this could still mean that immunisation is recommended. There are very few mandatory immunisation requirements for travellers. The main example of a disease that requires obligatory immunisation is yellow fever, but this is only required for parts of Africa, South America and Asia. Usually, a certificate of vaccination is only required when entering a country from another country where yellow fever is endemic. Another example is the necessary immunisation for Poliomyelitis for travel outside most Western

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<sup>22</sup> Advised vaccines include: cholera, hepatitis A, Japanese encephalitis, meningococcal disease, rabies, tick-borne encephalitis, typhoid fever, and yellow fever. Mandatory vaccination, as authorized by the International Health Regulations, nowadays concerns only yellow fever.

<sup>23</sup> WHO (2010): 1-3.

<sup>24</sup> Examples include: yellow fever, hepatitis, typhoid fever, polio, diphtheria and many others.

countries. This disease may have been eliminated in these countries, but in the rest of the world, it is still a common disease and therefore a serious risk for people who have never been vaccinated against the disease.<sup>25</sup>

Usually, responsibilities of international travellers are mentioned in terms of benefits of health precautions that protect the individual traveller from developing an infectious disease in a foreign environment. A caution should be included, however, that immunisation is not only essential for the traveller himself, but also for the community that surrounds him (herd protection). The recognition of the important role of international travel in the transmission dynamics of epidemics and pandemics, demonstrates a whole different responsibility. The moral arguments concerning these responsibilities will be discussed in the next section.

## MORAL CONSIDERATIONS

With regard to the implementation of public health measures, governments have a responsibility towards their citizens to inform and protect them, in order to minimise the burden of the disease on society. In order to delay the spread of a serious infectious disease or mitigate the impact of a pandemic, government intervention with regard to (mandatory) health precautions for travellers would be justified. Such precautionary measures can consist of immunisation, social distancing and/or restriction of individuals' movements, including limitation of social gatherings, border control, travel restrictions, quarantine of contacts, isolation of cases, and even border closures. However, given the burden such measures may place on individual liberties and the need to balance potentially conflicting individual and community interests, the use of precautionary measures should be carefully outlined and limited to circumstances where they are reasonably expected to provide an important public health benefit.

In the context of immunisation, a moral dilemma often arises in the balancing of beneficence (doing good) and non-maleficence (avoiding harm), which plays a role in nearly every medical decision. From the principle of beneficence, governments have a collective duty to care for their citizens (ensure the supply of effective measures to prevent serious illnesses), doctors have an obligation to help patients, and individuals must follow the rule of rescue.<sup>26</sup> The principle of non-maleficence means that no experimental or ineffective treatments should be administered to patients, as these might harm them. Only vaccines that have proved effective and safe (with minimal known side-effects) should be considered for immunisation purposes.<sup>27</sup>

From a human rights perspective, vaccination equitably promotes and protects public health, and has thus come to be viewed as an obligation to ensure that the rights of affected individuals and populations are respected and promoted. Governments have the responsibility to guarantee the right to assistance and protection of individuals and

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<sup>25</sup> [www.who.org](http://www.who.org)

<sup>26</sup> Rule of rescue: the imperative people feel to rescue identifiable individuals facing avoidable death.

<sup>27</sup> The principle of non-maleficence would justify the delay in mass immunisation in the case of H1N1 and Ebola.

populations.<sup>28</sup> This would include preventive measures to avoid infectious disease spreading.

With regard to the liberty of tourist movement as outlined in article 8 of the GCET and fostered by the United Nations and the UNWTO, imposing mandatory precautionary measures would be conflicting with this article that states that administrative procedures, such as health formalities, should facilitate “the maximum freedom of travel and widespread access to international tourism.”<sup>29</sup> Richter et al. argue that in general, public authorities seem to be very reluctant to acknowledge that the immense growth of international tourism may require restrictive measures because of the negative problems they may cause, for example health-related issues exacerbated by tourism.<sup>30</sup> They claim that international tourism is confronted with increasingly lax policy standards and reduced vigilance by the public and private sector, under the pretext of the need to “facilitate tourism to boost it”: the visiting or returning tourist must not be harassed or delayed. In order to facilitate tourism in the name of economic development, political pressure tends to simplify ‘red tape’ that may include health protection of both tourists and non-tourists. Cost-benefit analysis seems to favour tourism over the general citizenry, and to discount a future health threat over the present advantage of economic benefits from tourism. Thus, public authorities in tourist-receiving countries generally do not discourage tourists from coming, even when a major health hazard exists. They may seldom if ever warn inbound tourists of health or safety issues, because they would rather not kill the goose that lays the golden eggs.<sup>31</sup>

The question arises of whether the government’s first responsibility, which is to protect its citizens, is not often overshadowed by political convenience and economic profit. In this context, Richter et al. argue that it seems as if health requirements are globally reduced in the name of facilitating tourism, although at the same time vulnerability to infectious diseases is increasing due to these tourism movements.<sup>32</sup> Facilitating tourism would be consistent with article 8 of the GCET, but yet, the public would expect the government to fulfil its core responsibility of protecting them and keeping them safe. When it comes to weighing freedom of travel and economic benefits against public health – which is a long-term factor of well-being – public health and prevention of diseases and pandemics are more weighing arguments. Besides, if a pandemic strikes and paralyses not only tourism, but economy as a whole (as it is

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<sup>28</sup> Universal Declaration of Human Rights, Art. 25: “Everyone has the right to a standard of living adequate for the health and well-being of himself and his family, including food, clothing, and medical care ...”

<sup>29</sup> GCET, Art. 8.4 (1999): “Administrative procedures relating to border crossings whether they fall within the competence of States or result from international agreements, such as visas or health and customs formalities, should be adapted, so far as possible, so as to facilitate to the maximum freedom of travel and widespread access to international tourism.”

<sup>30</sup> The global booming senior market in tourism – including the particular health-needs of this group – is a major concern as well. Discussion of this issue goes beyond the scope of this paper [Richter et al. (1999): 1-4].

<sup>31</sup> Richter et al. (1999): 1-7.

<sup>32</sup> At present, WHO guidelines require less and less scrutiny of incoming tourists [Richter et al. (1999): 1-4].

happening in the case of the Ebola outbreak in Western Africa), the burden will be insurmountable.

What does this mean in practice for the government of a tourist-exporting country? First, it would require the government to give proper information and increase public awareness about disease-related risks in travel and tourism in order to increase public commitment and comprehension for health precautions. Furthermore, the government is responsible with regard to facilitating immunisation for international travellers. With regard to the costs of travel vaccinations, health insurance companies ought to include a (partial) compensation in their (supplementary) insurances. As prevention is better and more cost-effective than cure, the government ought to include compensation of travel vaccinations in the standard insurance package to encourage travellers to get vaccinated.

Under guidance of the WHO, international health regulations, including vaccination requirements, have been implemented by the 194 States Parties to enhance national, regional and global public health security. Most Western governments follow WHO global rules on vaccination requirements. For example, in the USA the Centers for Disease Control and Prevention (CDC) recommend that all persons be up-to-date on routine immunisations, and that they consult with a travel health specialist concerning specific immunisations that may be recommended for their destination. The keyword here is recommend, which makes immunisation voluntary, not obligatory. As the main ground for immunisation is mentioned the fact that “when a traveler goes to a country that is not similarly protected, a person can be at dangerous risk of contracting a disease.” The risk of transmitting an infectious disease and putting other people at risk is not taken into consideration. In this context, it strikes me that many countries do not require inbound travellers arriving from high-risk countries to show relevant vaccination certificates, although the government has a responsibility to protect its citizens from severe infectious diseases.<sup>33</sup> Similarly, immigration authorities ought to check vaccination certificates of their own citizens travelling to high-risk countries before departure (especially if certain vaccinations are mandatory, e.g. yellow fever). In view of an increasing ease and speed of cross-frontier travel that contributes to the spread of infectious diseases, responsibilities of travellers, as well as national governments, ought to be reviewed, because travellers and government both have a moral responsibility to protect the health of the people. The recent pandemic influenza H1N1 2009 and fears for new pandemics (e.g. avian flu, or Ebola) require authorities to be aware, alert and prepared.

## CONCLUSION

The aim of this paper was to explore what moral responsibilities flow from the Global Code of Ethics for Tourism to governments to prevent spreading of infectious diseases by travel and tourism. The Code appeared to confront us with a dilemma of how the moral responsibilities to prevent spreading of infectious diseases by travel and tourism are conflicting with the facilitation of maximum freedom of travel

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<sup>33</sup> It should be noted that health policies for pets and other animals are much more strict.

In the first section, I have outlined the role that tourism and travel play in spreading infectious diseases and the content of the GCET with regard to health protection and freedom of travel. The Code describes the responsibilities of individual travellers and other stakeholders to safeguard tourists and others from health risks related to travel and tourism, and on the other hand the demand to simplify administrative procedures, such as health formalities, to facilitate freedom of travel movements.

In the second section, I have sketched the main features of certain infectious diseases (in particular pandemic influenza H1N1 2009 and Ebola) and the occurrence of epidemics and pandemics. In the next section, I have outlined the matter of preventive measures to avoid this spreading of infectious diseases, with a special focus on immunisation. In this context, the responsibilities of the international traveller towards his own health protection was linked to his responsibility towards the people that surround him (in the travel destination, as well as his homeland).

In the third section, I have clarified some moral considerations that can be useful to explore practical moral duties with regard to preventive health protection inherent in travel (e.g. mandatory immunisation and/or travel restrictions). In particular, I have explained the balancing of beneficence and non-maleficence, and the human rights perspective. Furthermore, I have explored the moral dilemma that confronts the governments with regard to the seemingly inconsistent responsibilities that flow from the provisions in the Global Code of Ethics for Tourism. On the one hand, there is the demand to impose preventive measures with regard to health protection inherent in travel, on the other the government should facilitate freedom of travel movement. The latter can be outweighed, however, by the moral demand that governments ought to protect the health of their citizens, in order to minimise the burden of the disease on society.

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# UNDERGRADUATE STUDENTS' LEARNING CHARACTERISTICS: PERSPECTIVES FROM LECTURERS AND STUDENTS

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## ABSTRACT

*The study examined hospitality undergraduate management students' learning preferences and issues faced by lecturers when interacting with these students. One focus group with lecturers and three with students were conducted. Content analysis of the transcripts indicated that students are result-/short-term oriented and vulnerable to failure. They exhibit both dependent and independent characteristics and have a sense of entitlement. Ways to motivate student learning and effective instructional techniques were identified. Students' use of mobile devices and their communication patterns with faculty members were also profiled. Based on findings, learning/teaching strategies were suggested to promote active learning.*

**KEYWORDS:** Student preferences; Learning characteristics; Teaching strategies; Gen Y.

## INTRODUCTION

The current cohort of students entering higher education is identified as Generation Y (Gen Y), which is also known as Millennial Generation and/or Net Generation (LaBan, 2013). As with all generations, Gen Y possesses a distinctive peer personality and several characteristics that make it distinguishable and immediately recognizable at interactions with other generations (Coomes & DeBard, 2004). As this generation becomes economically active, implications brought with it have been studied extensively in areas of workplace (e.g., Lowe, Levitt, & Wilson, 2011), consumption behavior (e.g., Pokrywczynski & Wolburg, 2001), and education (e.g., Eisner, 2011).

Roughly between the ages of 13 and 33 by Howe and Strauss' (2000) definition, born from 1982-2002, this generation is believed to be more educationally ambitious than any of its predecessors (Sax, 2003). On average, the percentage of school-age students enrolled in tertiary education programs grew by 75% from 18.26% in 1999, the year when Gen Yers started to enter university campuses, to 32.15% in 2012. In OECD countries and Hong Kong, the ratio even reached 60% (UNESCO Institute for Statistics, 2014). The large influx of Gen Yers to university campuses filled with Baby Boomer and Generation X faculty has intensified potential intergenerational divergences and the incompatibility between established instructional strategies and the unique learning preferences of these students (Weiler, 2005). Anecdotal evidence suggests that educators frequently feel perplexed and frustrated as students today seem particularly difficult to teach and motivate. Researchers believe that these educational challenges can be better addressed with generational analysis and that the cultivation of awareness of both

generational differences in learning styles and the generational prejudice held against each other will be the first step in solving potential/existent conflicts (Pardue & Morgan, 2008).

To advance hospitality education for current students and narrow communication gaps between different generations on campus, it is of paramount importance for administrators, faculty, and student service providers to understand students' learning preferences and what motivate student engagement. Therefore, the objectives of this study are to:

1. understand hospitality management students' learning preferences and behaviors;
2. investigate issues faced by teaching staff when interacting with undergraduate hospitality students; and
3. recommend learning/teaching strategies to promote active learning.

## LITERATURE REVIEW

Each generation is described with label(s) pertaining to the distinctive characteristics shared among its society-wide peer group. Howe and Strauss (2000) asserted that the common persona is formed by historical trends and events occurred during the generation's formative years. For Gen Yers, the most influential force shaping their characters is probably the evolution of information technology (Oblinger, 2003), followed by the self-esteem movement (LaPorta, 2009) and the "helicopter parents".

### Information Technology

While the advent of information technology has tremendous impacts on all living generations, Gen Yers were the first among them to have led a digital lifestyle since childhood (Nimon, 2007). They feel the urge to stay connected with friends, family, and even strangers on the Internet at all times. This generation is seen to put more emphasis on "we" instead of "me" and tends to be more interactive than the earlier generations (McMahon & Pospisil, 2005). Another characteristic of Gen Y induced by the notion of connectivity is stronger peer bonds. With their visual senses trained by televisions and movies, and their writing skills practiced through emails and instant messaging, Gen Yers are considered mainly visual and kinesthetic learners (Junglas, Johnson, Steel, Abraham, and Loughlin, 2007;). Gen Y students are often bored with reading textbooks and listening to lectures, and feel challenged in processing information conveyed in copious class materials (Papp & Matulich, 2011).

Information technology presents both opportunities and challenges for higher education. It remains debatable whether Gen Y students have difficulties concentrating due to their constant switching among activities, or that multitasking is a highly developed and undisruptive skill common to this generation (Johnson & Romanello, 2005). A recent study suggests that students are increasingly receptive to the idea of using mobile devices for academic purposes, but at the same time they need

encouragement from educators and guidance on how best to use them as facilitating tools (Dahlstrom, Walker, & Dziuban, 2012).

Gen Y students have been criticized for being impatient and sometimes overly result-oriented for educators to achieve the teaching goal of engendering deep understanding (Roehl, Reddy, & Shannon, 2013). Exam results reveal that students perform better on objective questions where they can score by memorizing answers, than on the subjective questions where comprehensive and analytical essays are involved and thus require critical thinking skills (Eisner, 2011). Born and raised in a 24/7 service culture, Gen Yers have high expectations of instant gratification and expect immediacy in obtaining responses from instructors to email inquiries and receiving graded works and feedback. More profoundly, students only pay selective attention to information that is relevant to their lives and develop skills that are marketable once they graduate from college (McGlynn, 2008).

### *Self-esteem Movement*

The seminal work, *The Psychology of Self-Esteem*, of psychologist Nathaniel Brandon (1969) marked the onset of the self-esteem movement in which parents were told that the feelings of self-esteem play a crucial role in their children's success. The two most often cited side effects associated with this parenting practice are narcissism and entitlement (Stein, 2013). Raised by parents who strive to instill self-esteem in them and tell them that they are "special", Gen Yers appear to be more confident in overcoming challenges (Raines, 2003). However, children who grow up with participation trophies tend to put less effort into their endeavors but still expect to fulfill their ambitions.

In the academic arena, Gen Y students seem reluctant to engage in deep learning and they expect to get a "pass" for any work handed in, regardless of the actual quality (Eisner, 2011). As Gen Yers who have not been subjected to much failure in life do not typically possess the necessary frustration tolerance to deal with it, students are more than likely to give up when their accomplishments fall short of their expectations (LaPorta, 2009).

### *"Helicopter Parents"*

Growing up with burgeoning child protection systems in their communities, Gen Yers are by far the most protected generation (Howe & Strauss, 2000). The society-wide child safety movement coincided with the trend towards smaller families. With fewer children to attend to and greater support and resources available from the society, many parents of Gen Yers have resorted to a new child-rearing style named "helicopter parents". These parents incline to hover around, attempt to get involved in every aspect of their children's lives, and come to their children's rescue at the first sign of any hostility from schoolmates, teachers, or any other perceived threats (Glass, 2007). When parents strive to create a perfect, competition- and threat-free environment for the children, they overlook the chance to prepare this generation for the real life imperfections (Cline & Fay, 2006). Accustomed to the attention and dedication from parents, Gen Yers expect

the same level of attention and support at school whenever they encounter difficulties (McGlynn, 2008).

Howe and Strauss (2000) also noted that students who have been living highly-structured lives and under tight oversight from parents attach less importance to creativity and imagination; rather, they have been well adapted to the structures imposed and are comfortable with the way their parents organize their time and activities (McGlynn, 2008). Consequently, Gen Y students may appear to have time management issues and lack self-planning capabilities. Indeed, universities have witnessed their students' struggle with the overwhelming transition from high school to a lifestyle with suddenly enlarged personal freedom (Pardue & Morgan, 2008).

## METHODOLOGY

Due to the lack of empirical research on hospitality Gen Y students' learning preferences, the current study used a qualitative approach to explore this subject among both teachers and students. To accomplish the research objectives, primary data were gathered from focus group discussions. Kreuger (2000) and several other scholars (e.g., Nyamathi & Shuler, 1990) proposed that three or four focus groups should be sufficient for simple research questions. Following the principle of theoretical saturation and the general rule-of-thumb, four focus groups were conducted: one group with faculty and three groups with students. After a preliminary review of literature, two focus group discussion guides (one for the faculty and one for the student groups) were formulated to keep the discussion on track, each centering on three lines of enquiry: a) learning behaviors/preferences, b) communication with students/teaching staff, and c) teaching strategies/time management.

A focus group with faculty members at a public university in Hong Kong was conducted to examine their experience of interacting with undergraduate hospitality management students inside and outside of classrooms. Their frustrations and ways to solve any challenges faced are solicited. All faculty members who taught at least one subject in the undergraduate hospitality management program at the time of the data collection were invited to participate. Of the 12 invited faculty members, only eight were available at the scheduled time. The eight-member focus group was conducted in English by a professor who is a colleague of the participants. The discussion was audio-recorded and lasted about 90 minutes.

Three student focus groups were conducted to understand their learning preferences and behaviors and explore ways to motivate them to engage in active learning. Relevant issues identified in the focus group with teaching staff were also discussed to seek insight from students as to their reasons for certain behaviors or requests. A convenience sampling was used to identify potential participants. Attempts were made to invite students of various characteristics based on their academic performance (accumulative Grade Point Average [GPA]), year of study, place of origin, and gender. The goal is to have a participant profile that is as close to the general student

population profile as possible and to explore the topics from different perspectives (Litosseliti, 2003).

The focus groups were moderated by a research assistant who is also a Gen Yer and observed how the focus group with faculty members was conducted. Each of the focus group sessions consisted of five to seven student participants and was conducted in Cantonese and Mandarin, the native languages spoken by the vast majority of the student population at the university. The focus groups were audio-recorded with discussion periods ranged from 60 to 90 minutes.

The discussion recordings were transcribed into English text for data analysis. All transcripts were independently analyzed by two researchers using NVivo 10.0. Regular discussions were held between the two coders to resolve disagreements on code assignment and categorization. Associations among categories were analyzed and consensus was reached on a final coding structure. In the end, the main categories were condensed into three broader themes: 1) general learning characteristics, 2) in-class behavior and participation, and 3) faculty-student communication.

## RESULTS AND DISCUSSION

### General Learning Characteristics

#### *Result- and short-term oriented*

The most prominent learning characteristic agreed by all faculty participants was that students are becoming increasingly practical and result-oriented, and they care less about the process that leads to the desired outcomes. The same was reported by students themselves. For them, education is merely a means to an end. As a result, their attitudes towards learning are largely determined by the specific outcomes they want to achieve, which range from good grades, scholarships, to decent jobs after graduation. The students' result orientation seems to be closely associated with another trait of theirs—short-term orientation. Upon closer examination, the desired outcomes are mostly short-term and can vary from semester to semester.

Students' pursuit of instant gratification is also reflected in several notable educational requests. According to faculty participants, students demand detailed guidelines on assignments and feedback on their draft work before final submission to save time and ensure good grades. Not all faculty believed that these traits are necessarily problematic, as stated in the following:

*“... they have learned from experience that there is a model answer... so [they ask us] “tell me... how to get to those answers”... we respond by... giving them all the hints, the guidelines... I'm not blaming them. I think they are much smarter.” (T7)*

However, faculty representatives were concerned that students “lack real motivation” to study as they are primarily driven by short-term benefits. For example, some students

skip classes that do not take attendance and review lecture notes only before exams. Student participants pointed out that they prefer course contents that are “practical and close to the world (S1-3)”. For students who see no immediate merits of college education, attending university is not a means of acquiring knowledge but a responsibility imposed on them by their parents, as one student articulated:

*“... grades are not that important. Sometimes, interview performance is more important ... Therefore, I think it’s meaningless and useless. All I want is to graduate soon.” (S1-3)*

Furthermore, as students learn to be more practical and resort to shortcuts to achieve their goals, they spend less time reading and developing critical thinking skills, as illustrated by the comment of a faculty member:

*“...they tend to do surface learning and skip part of this and part of that... still they think they will be able to get the whole story.” (T1)*

Students were found to be good at memorizing theories but less so at applying knowledge to analyze and interpret real-world data. Academic writing is another area of weakness. Having access to an overwhelming amount of information online, students demonstrate difficulty in evaluating potential reference sources for their reliability and suitability. Some of them would use whatever comes out “at top of the Google search (T5)”. Apart from locating and selecting reference sources, students seem to also have a hard time paraphrasing and integrating materials into their own arguments.

### *In/dependent*

One of the faculty members believed that today’s students are more independent and more comfortable doing assignments on their own than students in the past. Others felt the contrary, as students constantly demand detailed guidelines and sometimes even templates and sample works to help them complete the assignments. As indicated by both students and teaching staff, this tendency could be accounted for by the result orientation and shortcut culture.

*“We come to classes expecting them [teachers] to explain everything we need to learn clearly so that we don’t have to refer to textbooks later.” (S1-2)*

*“... so they [students] understand everything and they don’t waste time too much and get lost in what the teacher want from them.” (T4)*

Rather than not having the capability to complete assignments by themselves, students require “additional help” to ensure that they do not waste time and effort that do not entail immediate tangible benefits. In fact, technology has enabled students to be much more independent. When encountered academic problems, the majority of students try to solve the problems by searching for information online. Others would turn to their classmates, who speak the same language in both literal and metaphorical sense. As

instantaneity really matters to them, response time was another reason why all student participants placed “consulting lecturers” as their last resort.

Students also explained that poor academic performances are more the result of a personal choice than an inability to manage time effectively:

*“... it has something to do with priorities... just want to get a “pass”, you will allocate more time to do part-time jobs and go out with friends.” (S1-4)*

*“... The assignments are just not as important as the other things in their lives...” (S3-6)*

### *Entitled*

Several faculty members described the students as more challenging to satisfy than previous generations. Students are reluctant to accept what they are told at face value but determined to know the reasons behind every decision and requirement. The student accounts below also support what McGlynn (2008) coined as students’ “consumerism” attitude towards education:

*“The school should print out lecture notes for us... If we are required to read textbooks, why didn’t the school buy more copies?” (S1-3)*

*“... they should think about the end users when designing PowerPoint slides.” (S3-2)*

*“... you have to show us the value, the reasons why we should attend your lectures.” (S3-5)*

### *Vulnerable to failure*

The discussions revealed that students suffered from low frustration tolerance and exhibited a tendency to give up when disappointed by unmet expectations (LaPorla, 2009). A faculty member noted that students get frustrated if they give incorrect answers to her questions, even if she tried to encourage them with positive reinforcement. The vulnerability to failure is also noticeable in students’ comments:

*“I feel quite depressed when I get unsatisfactory results after all the hard work... It surely demotivates me if the results I get do not reflect the amount of effort I put into studying.” (S3-7)*

*“...if I know I can get higher than a 3.2 [GPA required for 2<sup>nd</sup> Class (Division 1) Honours] but can never make it to 3.7 [minimum for 1<sup>st</sup> Class Honours], then why should I make the effort to try?” (S3-2)*

### *In-class Behavior*

#### *Motivators and demotivators*

Lecturers were concerned about their ever-growing struggle to retain students' attention and enthusiasm in class. They felt that they had to constantly compete for students' attention as mobile devices became commonplace in the classroom.

*"... if they lose their attention, then they have absolutely no difficulty reverting to their tablets or laptops, their smart phone, and then dragging all the people into it as well."* (T5)

The single most frequently mentioned motivating factor by students was "interest", which could refer to both the way the lecture is delivered and the subject itself, with much discussion focused on the former. Presentation skills of the lecturer include whether he/she can articulate the concepts and theories in simple and understandable terms, and serve as a facilitator of student learning. Other factors related to instructional style, including classroom atmosphere, English language skill of the lecturer, intonation of voice, personality of the lecturer, and the amount of effort put into the preparation, were also suggested by students as motivators to learn:

*"Some lecturers can create a great classroom atmosphere."* (S2-1)

*"... if the lecturer is a nice person, I will answer his/her question."* (S3-3)

*"Whether I go to class or not really depends on whether I feel the lecturer puts an effort in teaching."* (S2-4)

Some faculty members opined that interactive teaching, such as posing questions and creating opportunities for discussions, is the solution to students' ever shorter attention spans. However, according to the students, the type of questions and the way they are asked can make a difference. Students conveyed a preference for nonfactual questions so that they could express their ideas freely without worrying about getting the correct answer, and for lecturers not directing follow-up questions to the same student as this resembles too much of an interrogation.

To take advantage of the result orientation of students, lecturers can effectively motivate students to come to class and take a more active role in learning by using the right type of positive reinforcement. Both faculty and students reported that candies, stickers, and bonus points are effective incentives. In addition, since students perform their best with the presence of immediate tangible results, exams and grades could also motivate learning, as suggested by some students:

*"If there're no exams, we won't be motivated to review course materials... If you really want us to study hard, you should adjust the degree classification and divide it into smaller ranges, like Second Low, Second Middle, Second Upper, etc."* (S3-4)

*Effective instructional techniques*

The majority of the student participants preferred lecturers who use examples, personal experience, case studies, videos, and simulation programs, in addition to PowerPoint presentations. Students also made extensive suggestions on PowerPoint presentation. Instead of copious text; they hope that lecturers can extract the essence from textbooks and show only what needs to be memorized:

*“The lecturers may think that the more they put into the presentation, the more students will learn. This is not true. The reality is that nobody will read the extra information...” (S1-3)*

Although some lecturers deliberately leave out detailed information hoping that students will pay attention in class, students indicated that they could not pay attention while worrying about whether they jotted down everything.

Faculty participants in general assumed that students prefer group assignments because collaborative learning received much discussion in the literature (Borges et al., 2010). However, for most group projects, students reported the need to spend extra time getting to know team members assigned, and they have to do extra work if they have free riders or poor performers in the group. Thus, the risks involved in group projects outweigh the benefits of making new friends. That said, a few students did recognize the values of group assignments and made some suggestions to make group assignments more enjoyable:

*“I suggest that the lecturers arrange more group projects for Year One students to help them know more people and also because the workload is not so heavy in Year One.” (S1-6)*

*“Group projects are acceptable and beneficial to you if you can choose your own team members... Now I’d rather they divide a group project to two or three individual parts which will be graded individually.” (S3-6)*

### *Use of mobile devices*

With mobile devices becoming commonplace in practically every aspect of modern life, students are more and more comfortable using their mobile devices for personal and entertainment purposes in class, as some faculty participants reported. With the “if you cannot beat them, you join them (T7)” spirit, the faculty has also become more open-minded about this phenomenon over the years and some members shared their experience of successfully incorporating mobile technology into teaching. Nonetheless, much debate has been centered on whether or what kind of mobile devices should be allowed in class.

When students were asked about their use of mobile devices in class, some claimed that they used their mobile devices mainly for academic purposes. For instance, they would check online dictionaries or other informative sites when they felt that the lecturers did not explain a concept well enough. However, students admitted that they would use these devices for entertainment especially when they found the lectures boring.

They would browse social media sites, do online shopping, reply emails, or do anything that does not require their full attention.

Faculty members in general were concerned that students had great difficulty staying focused on one thing and this concern is evidently not unwarranted. Only one of the students (S2-2) was very confident that he could manage the “switch” from one activity to another quite well, the rest all agreed that mobile devices could be both a facilitating tool and a distraction. Due to the need for instantaneity, whenever one student sends out a message to a group, all members in the group will feel compelled to reach out for their phones and are distracted at least during the few minutes when they check and reply the message.

### Faculty-Student Communication

All participants agreed that faculty-student interactions outside of classroom had been minimal. Faculty participants assumed that students now are much busier with their social calendars and not interested in sparing time for faculty-student communication. They also found not only the communication with students less frequent than before, but also that the topics of such communication were largely confined to the subjects they were teaching:

*“A lot of that closeness is just not present any more.” (T5)*

*“Now the students will only come to my office for the subject.” (T6)*

Students in all focus groups reported the need for instantaneity as the main underlying reason for not communicating with faculty members. Compared to finding a quick answer online, consulting a faculty member obviously entails additional work, such as researching the topic beforehand just in case they got challenged, and is therefore avoided to the greatest extent possible. However, four students expressed their willingness to develop closer relationships with the faculty, saying that they would be more motivated to learn if they have close relationships with teachers.

In terms of communication channels, most students still preferred face-to-face interactions which provide instant feedback for their questions. However, students often encountered problems during evening study time. Instant messaging apps may be used if the two parties knew each other on a more personal level. For students, how quickly the faculty members respond to their enquiries seems to be more critical than the type of communication channel used. On the other hand, faculty participants reported frustration in students’ lack of response:

*“They’re very selective [about technology]. I will send students reminders or guidelines through [school] email and Blackboard email. But I doubt whether they really read my emails. (T3)*

## CONCLUSIONS AND IMPLICATIONS

This research sought to provide insights into hospitality students' learning behaviors from the perspectives of both the students themselves and university faculty. Through a series of focus group discussions with faculty representatives from a hospitality management program in Hong Kong and students in the same program, the study discussed issues encountered by the teaching staff when dealing with students and preferences of these students in their learning process.

By and large, the findings reveal a strong emphasis by students on relevance and immediacy. Students lose their interest in learning as soon as they find the lecture content unrelated to or different from what they aim to achieve at the moment. They seek instant gratification for the effort put into learning and avoid spending time in deep learning which does not guarantee any immediate, tangible benefits. From the teachers' perspective, these students appear to be unmotivated and oftentimes resort to shortcuts (e.g., asking for sample work and model answers) that prevent them from developing critical thinking skills.

The findings that students wish to know what is expected of them and what they have to do to achieve their goal support the use of outcome-based education. Educators are more likely to achieve their desired teaching goals by articulating intended learning outcomes in writing (in subject syllabus) as well as verbally at the beginning of each course (Borges et al., 2010). It will also be useful to indicate clearly the criteria against which students' work will be evaluated. For instance, when critical thinking is a key area that teachers look for, it should be stated in the assessment marking rubrics as an evaluation criterion so that students will know what are expected of the work submitted. More importantly, how the learning outcomes relate to real life issues needs to be communicated to attract and retain students' attention (Nimon, 2007).

Many students expressed discontent towards common arrangements of group learning projects, maintaining that the cons could outweigh the pros. Students felt that the current peer evaluation mechanism does not deter free riders or non-cooperators in a teamwork assignment. Instructors are suggested to use peer evaluation, clearly articulate the importance of honest peer assessment, and implement the mechanism as planned so that students will see the consequences of not contributing to group projects.

The myth that today's young people can effectively multitask was also debunked in the student focus groups. Mobile devices could not only distract students, but also reach a large number of students in the same class instantly and simultaneously. As suggested by Dahlstrom et al. (2012), students need encouragement and guidelines from lecturers on how to use these devices for learning purposes and prevent them from dividing students' attention in class. For example, guiding principles on the use of mobile devices in class can be formulated at the institutional or departmental level specifying the types of devices and activities allowed in the classroom.

The students rejected the assumption that missing deadlines and course failure reflect a lack of self-planning skills on their part (Pardue & Morgan, 2008). They argued that these academic risk-taking behaviors were personal choices that indicate a lack of interest in studying. To motivate students to engage in active learning, it makes all the difference if lecturers can make the effort to remember students' names, encourage/initiate exchanges between teachers and students, and provide timely feedback to students' inquiries. Both positive (e.g., bonus points) and negative (e.g., point deductions) reinforcements can be useful when applied properly. Students appeared to be more participatory when the classroom atmosphere is friendly and they don't feel intimidated to speak up. The lecturers may need to praise the students from time to time to increase their confidence level, and encourage them when they fail to reduce their level of frustration. At the institutional level, it helps if administrators and program leaders can involve students in making class-related decisions (Carlson, 2005) and welcome continuous inputs from students to improve teaching and learning.

## LIMITATIONS AND FUTURE RESEARCH

The main limitation of the study is associated with the small sample size and potential sampling bias as it included eight faculty members and 18 students from a single hospitality program in Hong Kong. Findings of this research would not be conclusive or generalizable to all hospitality institutions. Demographic variables such as gender and country of origin or other study related variables such as academic performance (measured by GPA in the study) and year of study may also have an impact on learning behaviors of students. However, to achieve the objectives of this study, the students were treated as a homogeneous group and the potential differences were not examined. Future research on this topic could address these limitations by including a larger sample from different institutions and examine differences in opinions across different participant characteristics. Furthermore, the next generation (Gen Z) of students will enter college campuses in a few years' time. Their learning preferences may be different from those of Gen Yers' and require additional investigation.

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# ROLE OF SOCIAL MEDIA IN INFLUENCING TRAVEL DECISION MAKING AMONG FOREIGN TOURISTS VISITING KERALA

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## ABSTRACT

*Being one of the fastest growing industries of the world today tourism has emerged as a major sphere of influence of the economy, society and environment of many nations. Its potential for generating income and employment is known to be significant. The revolution that has occurred in information technology sector has also resulted in great impact for this industry. Today, tourists worldwide depend on social networking media and online sites for their travel decision. Travel choices today involve extensive web based research as well as analysis of reviews and opinions of other travelers. Moreover significant use of technology is applied by tourists from trip planning to trip. Kerala, having carved its own niche in tourism sector has received close to 900,000 foreign tourists during 2014. This paper is an attempt to analyze the use of social media among foreign tourists visiting Kerala as well as the interpretation of its various dimensions.*

Key words: social media, travel decision making, trip reviews, online research

## INNOVATION OF IT IN TOURISM INDUSTRY

The tourism industry has certainly been one of the earliest to make large-scale use of new information technologies. Technological progress over the past thirty years has allowed the most innovative tourism enterprises to redefine not only their own organizational structure but their relationships with partner organizations, thus achieving

the twin goals of optimizing operating costs and increasing the ability to generate value for their customers. There have been three main innovation waves impacting the tourism scenario in recent decades:

- The development of the Computer Reservation System (CRS) in the 70s;
- The development of the Global Distribution System (GDS) in the 80s;
- The Internet in the 90s;
- The social media and smart phone revolution of today

Buhalis defines E – Tourism as the application of ICTs on the tourism industry (Buhalis, 2003). Buhalis (2003) suggests that e-tourism reflects the digitization of all processes and value chains in the tourism, travel, hospitality and catering industries.

## INTERNET AND BIRTH OF E – INTERMEDIARIES AND INFO-MEDIARIES

Internet has redefined the business system and the notion of the channel of tourism products, in that it gives access of technologies to large masses of potential consumers and tourism enterprises. Another relevant effect of the advent of the internet is the birth of new players called e - intermediaries in sectors like Travel portals that have been established with the specific mission of offering tourist products via the web. As a result of the introduction of new tourism e-intermediaries, customers' choices for searching for product information and to book autonomously have increased significantly. Notable examples include expedia.com, yatra.com, makemytrip.com, travelguru.com, Travelocity.com etc. in India.

The electronic intermediary that provides and controls information flow in cyberspace, often aggregating information and selling it to others are popularly nicknamed 'infomediaries' (Turban et al., 2008) whose most well-known examples are TripAdvisor and HolidayCheck (Egger & Buhalis, 2008). 'Metamediaries' like travel meta-search engines (TSEs) appear between suppliers and consumers to aggregate and filter out relevant and pertinent information from the wealth of material (Egger & Buhalis, 2008). TSEs like Wayn, Sidestep, Mobissimo, Kayak and Travel Triangle enable customers to compare offers and prices by carrying out live queries to suppliers, consolidators and online agencies and presenting the results transparently.

## SOCIAL MEDIA AND SOCIAL NETWORKING IN TRAVEL AND TOURISM

Social media is the online platform and tools that people use to share opinions and experiences, including photos, videos, music, insights, and perceptions with each other (Turban et al., 2008). As a powerful democratization force, social media enables people, rather than organizations, to control and use various media with ease at little or no cost; consequently, it enables communication and collaboration on a massive scale (Turban et al., 2008).

Social network is a place where people create their own space, or home page, on which they write blogs or web logs; post pictures, videos or music; share ideas; and link

to other web locations they find interesting (Turban et al., 2008). They provide a user with a collection of various interaction possibilities, ranging from a simple chat, to multiple video conferences, and from the exchange of plain email messages to the participation in blogs and discussion groups. Since social media enable tourists to share their experiences almost instantly, it is considered as a significant mediator agent of the tourism experience (O'Dell, 2005). The use of social media can influence tourists' perception and reinterpretation of the places, activities and other people (Darmer & Sundbo, 2008; Jansson, 2007; Kang & Gretzel, 2012; Tussyadiah & Fesenmaier, 2009). In the tourism industry, websites and social media provide a wealth of information with regards to experiences and review of the destination, property, facilities and restaurants (Litvin & Hoffman, 2012). What was recorded in traditional form is now digitalized and shared globally (Munar, 2012). Trusov et al. (2009) define social media as a medium that can provide sites for consumers to share their experiences and opinions with others who own the specific social media. Most travelers nowadays often use the Internet for destination information for decision-making (Jeng & Fesenmaier, 2002). D. Buhalis (1998) pointed out that tourism is one of the sectors that have a very close relationship with new information and communication technologies.

Many researchers refer to social media as a new type of word of mouth or the eWOM. Gretzel et al. (2008) argue that consumer generated media can be understood as a new form of word of mouth that happens beyond the traditional social circles of consumers. Examples for thousands of these sites include blogs (Wordpress, Blogger, Typepad); content sharing sites (YouTube, Flickr, Photobucket); social networking sites (face book, my space); professional networks (Linked in); Micro blogs (twitter); branded online purchasing sites (Amazon, eBay) etc. and so on. The proliferation of mobile phone technology has seen the mobile version of all these applications apart from new communication apps (like whatsapp, we chat, line, viber etc). The traveler today is actively participating in five primary sites: Trip Advisor, Face book, Twitter, YouTube, and Flickr.

## OBJECTIVES OF THE STUDY

The following are the major objectives of the study:

- To find out the extent to which social media is used to collect information for planning visits to Kerala.
- To identify the important social media sources used along with their magnitude in decision making of the traveler.
- To verify whether multiple sources are used to get varied information by tourists.
- To understand the actual experience of tourists with information generated through social media.

## METHODS / METHODOLOGY

The data collection involved development of a well structured questionnaire for surveying the foreign tourists. The questionnaire was prepared keeping in view the objectives of the study and to find out all information relating to the study. The primary

data was collected through structured questionnaire survey being conducted in three major tourist destinations in Kerala, India – Alappuzha, Fort Kochi and Kumarakom. The destinations were selected as they were among the top five destinations visited by international tourists in Kerala (with Fort Kochi getting the maximum number of foreign tourists to Kerala) and it was also relatively easy to get the survey conducted due to the geographic proximity of the destinations. One hundred and forty four tourists participated in the questionnaire surveys that were conducted in these destinations. The survey was conducted on three different days during the month of January / February 2015 that happens to be the later stage of the peak tourism season of Kerala.

Table 1. Number of Foreign tourists that participated, per city

Destination	Number of tourists participated
Alappuzha	30
Fort Kochi	92
Kumarakom	22
TOTAL	144

## MAJOR FINDINGS FROM THE SURVEY

Tourists from twenty countries participated in the survey. Of the total tourists who filled in the questionnaire survey, the majority were from UK followed by France. This was followed by Germany, Australia and Italy. Another point to be noted is that female tourists outnumbered their male counterparts with a total number of 81 females and 63 males participating in the survey. The major findings obtained have been summarized below under the respective heads of terms of reference.

Table 2. Nationality and Sex of participants

No.	Country	Number of tourists		
1	UK	39		
2	France	27		
3	Germany	20		
4	Australia	15		
5	Italy	6		
6	USA	5		
7	Belgium	5		
8	Israel	5		
9	Austria	4		
10	Canada	3		
11	Denmark	3		
12	Russia	2		
13	Sweden	2		
14	Spain	2		
15	Japan	1		
16	South Korea	1		
17	Switzerland	1		
18	Netherlands	1		
19	Belarus	1		
20	Chile	1		
	Total	144		
	TOTAL (Male + Female)	63	81	144

#### THE EXTENT TO WHICH SOCIAL MEDIA IS USED TO COLLECT INFORMATION FOR PLANNING VISITS TO INDIA

82 % of the foreign tourists who participated in the survey use social media for searching travel related information. While planning their trip to India, all the tourists surveyed affirmatively stated that they used social media for gathering information about destinations – attractions, access and accommodation facilities there. All of them also analyzed reviews provided by other travelers who have visited Kerala, notably on trip advisor.

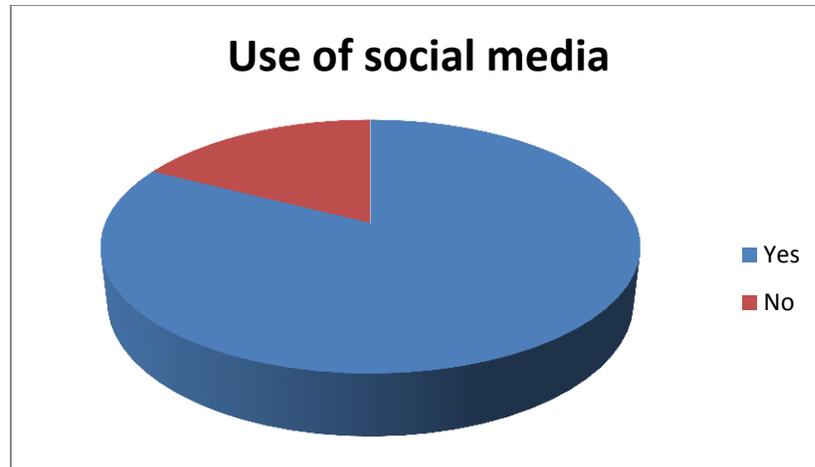


Figure 1. Use of social media for travel related information

The major reasons for using social media while planning their trip can be summarized as:

- Checking reviews by other travelers
- Gathering information about destinations
- Planning their trip
- Making reservations
- Enquiring and posting their own queries

The first two reasons were the top priority by tourists. It is interesting to note that though almost all tourists check reviews, very few of them take pains to post their own reviews.

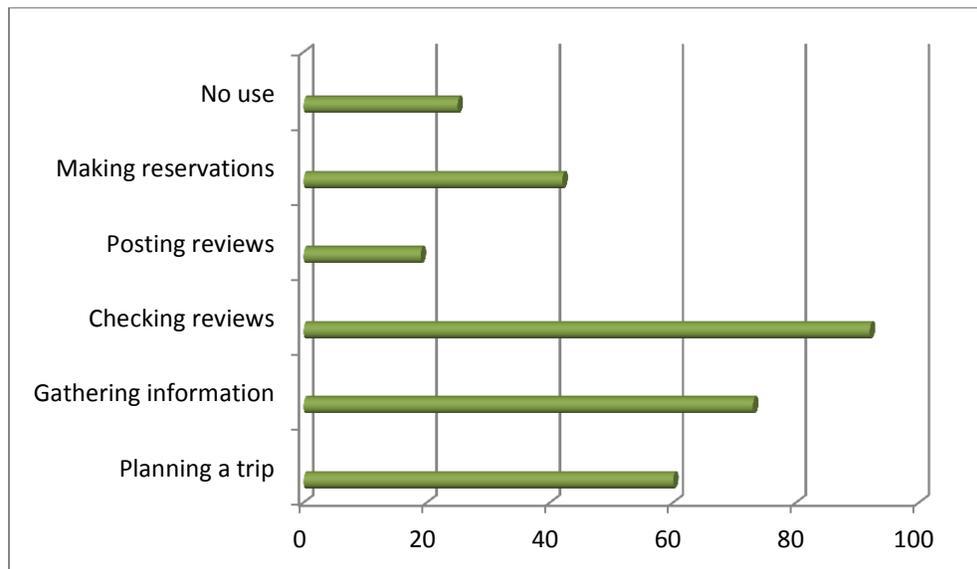


Figure 2. Reasons for using travel related social media

## WHAT ARE THE IMPORTANT SOCIAL MEDIA SOURCES USED ALONG WITH THEIR MAGNITUDE IN DECISION MAKING OF THE TRAVELER?

The major social media sources used by tourists who participated in the survey can be summed up according to their magnitude as – facebook, youtube, whatsapp, blogs, twitter, instagram, pinterest, flickr and others. But, the most important travel related media used is of course Trip advisor. 60% tourists who responded have used Trip advisor as a ready online source in the selection, study and decision making process of their trip to Kerala. Upon the frequency of their usage of social media, facebook and twitter is used almost daily by the tourists. Other social media is used occasionally – weekly, biweekly or even monthly. Trip advisor was widely used before the planning of a trip.

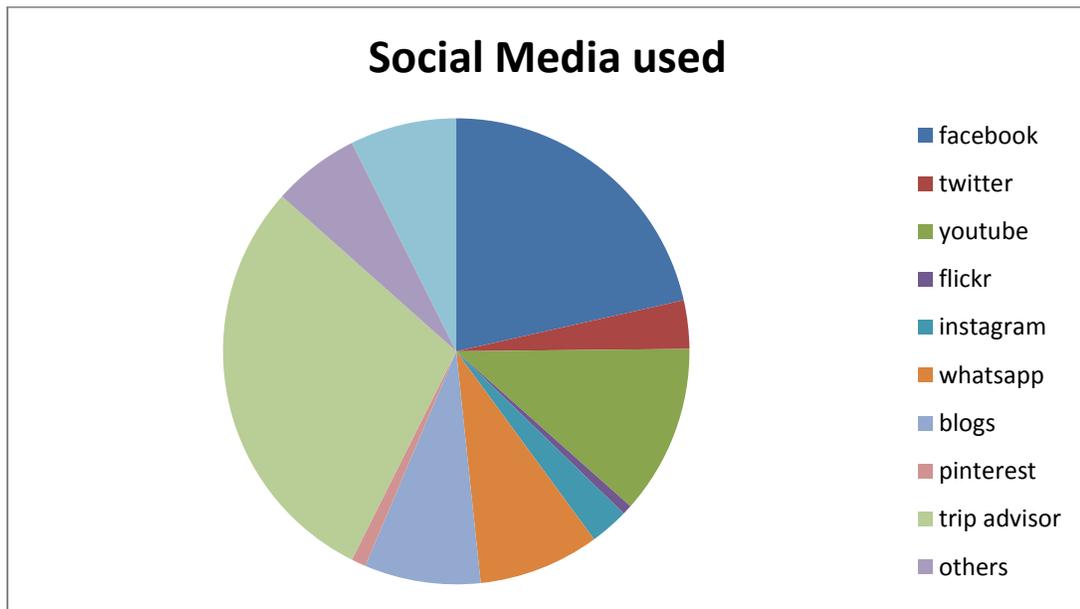


Figure 3. Various social media used by foreign tourists

## WHAT HAS BEEN THE EXPERIENCE WITH INFORMATION GENERATED THROUGH SOCIAL MEDIA?

The most important point of concern in planning and confirming a trip through information from web and social media and reservations online is whether the tourist will receive all the promised services at good quality standards once at the destination. 73% of the tourists who attended the survey in Kerala were happy that they received the promised standard of services; 8% responded they were not satisfied while the rest had no opinion. More than half of them had overall “good” actual experience (53%) while others responded it as “average” and “excellent” after rating the overall services they received. Some of them had no opinion and 5% rated the services as “poor” in Kerala.

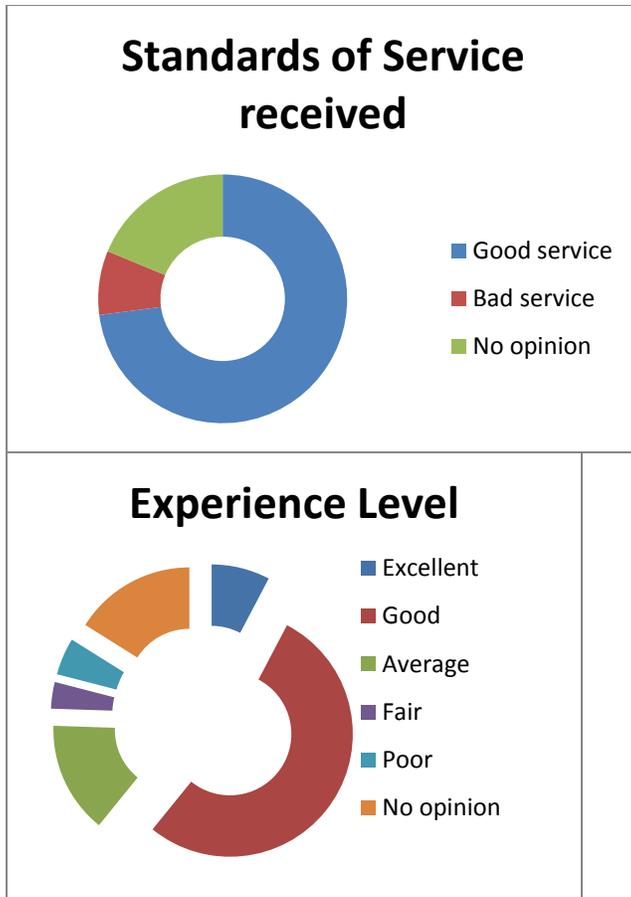


Figure 4. Standards of service and experience received by tourists

#### ARE MULTIPLE SOURCES USED TO GET VARIED INFORMATION?

All tourists interviewed used multiple sources to get information before prioritizing their visit, as listed below:

- Information from friends and relatives who have visited the destination
- Information obtained from websites related to the destination and service providers
- Information from own sources
- Information from print media
- Information from social media especially Trip Advisor
- Information from visual media
- Information obtained from advertisements

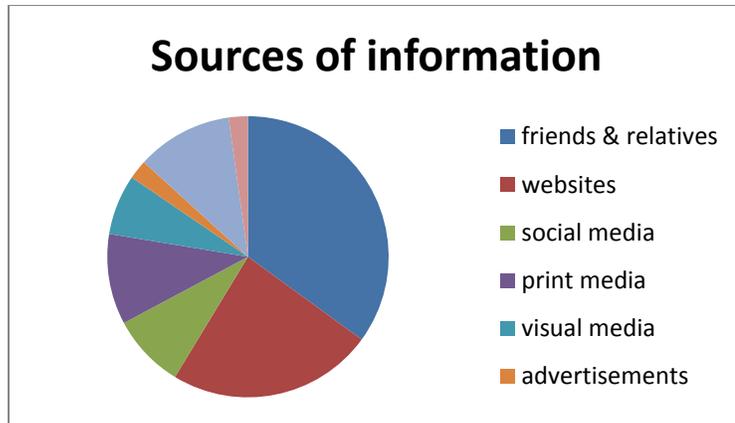


Figure 5. Sources of information on Kerala

Those who undertook pre research prior to confirming the trip utilized the following options in descending order of preference: Google search, Trip Advisor, information from their travel agents or tour operators, websites on destinations and service providers and other information sources. Very few referred to the Kerala Tourism official website. Preferences for choice of destination were the following: attractions, accommodation, transport, packages and others.

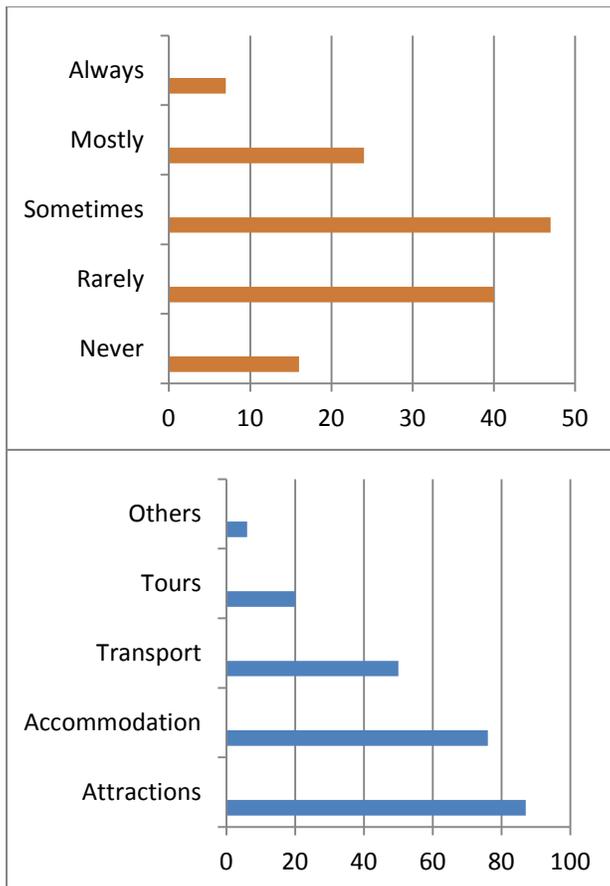


Figure 6. Frequency of use of social media / Details of pre trip research and study

## WHAT IS THE LEVEL OF CONFIDENCE IN OFFICIAL PLATFORMS PROVIDED FOR INTERACTION?

It is to be noted that nearly 60 % of the tourists actually confirmed their trip through direct reservation, mostly through online sites and payment gateways. Booking a trip directly to a foreign country that they are going for the first time is on the rise as shown by this impressive percent. Though direct payment gateways are there to facilitate reservations among service providers as well as there is an array of e – intermediaries, tourists still prefer it as safe and free from risk to confirm or buy a whole package from a travel agent or tour operator which is shown by 37% who used this method.



Figure 7. Confirming the trip

## ANALYZE THE INFLUENCE OF SOCIAL MEDIA ON TOURIST BY ASSESSING THE EFFECT ON “INDIVIDUAL” AS WELL AS “OVERALL LEVELS”.

Once on the trip, the tourists continue to use social media. They use it to check information on destinations they are visiting as well as weather, local transport etc. More than half of the tourists responded (58%) that they will post reviews or make updates on social media about their experience after the trip. Almost all tourists who replied they will post reviews also confirmed that facebook and Trip Advisor will be their first priority followed by whatasapp, blogs, twitter, youtube, instagram, pinterest and others. Exactly half of the respondents noted that they would acknowledge their service providers while the other half didn't think of the necessity to do so. 49% of the tourists in the survey replied they are happy to help other prospective travelers and share their experience with them. 32% had the opinion that it was not necessary to help others. Table below shows the media where travelers posted updates on their trip.

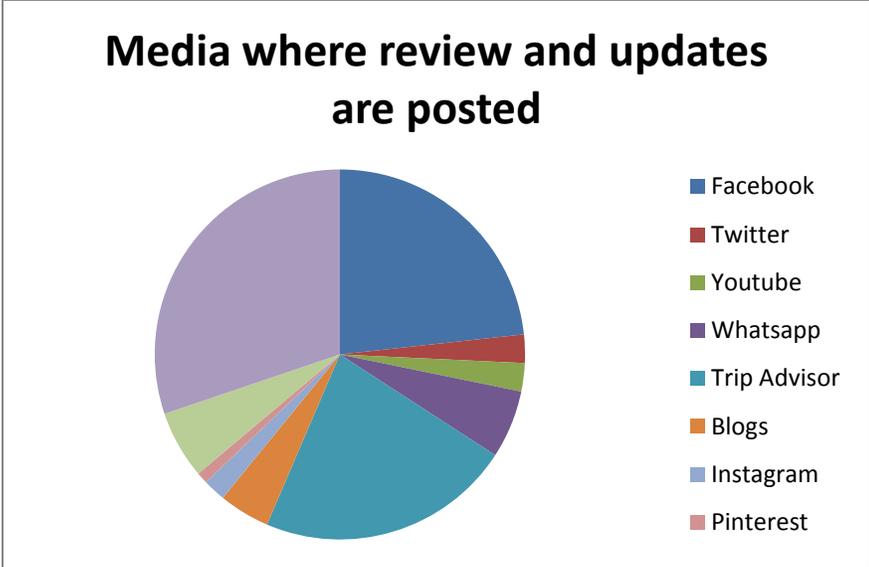


Figure 8. Social Media where tourists will post updates and review

**CONCLUSION**

Today we are all living in a fast moving world influenced by ever changing communication technology. Internet is playing its role in all spheres of human activities. There is no industry that is being not touched by information, communication and technology (ICT). And it is doing wonders for a highly competitive service sector industry like tourism. This study has given some fruitful data regarding the use of internet and social networking sites as an influencer among travel decision making, using Kerala as a case study. Kerala has been a pioneer in sustainable tourism development and has utilized modern technologies effectively for firmly affixing its brand image as ‘God’s own country’.

The study has provided important information on the role of social media in the decision making process of a tourist in choosing a destination. The changing taste and preferences of tourists can provide valuable inputs for market research and marketing and promotion of Kerala by the state tourism department. The actual experience of the tourists on the destination will help to make necessary corrective measures where there have been flaws in the service to tourists. The most important information obtained from the study is that more and more tourists have started reserving their tours directly and through internet based travel agencies. This will have an impact on the travel and tour intermediaries and they may have to reorganize and diversify their services.

The study has shown that more and more travel agents and tour operators are embracing modern technology for their marketing and promotion. But, it is still in the nascent stage in Kerala and there is scope for a quantum leap in this sector in the years to come. More research is required to study its implications and impact in future and to carve channels of communication to promote tourism in Kerala.

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THE SYNERGISTIC EFFECTS OF STRATEGIC ORIENTATIONS ON MARKET AND INNOVATION PERFORMANCE OF SOLE PROPRIETOR MICRO-SIZED TOURISM ENTERPRISES IN RURAL AREAS: REVIEWING MEDIATING ROLE OF MARKET CAPABILITY AND MARKETING CAPABILITY

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ABSTRACT

*The purpose of this research paper is to propose a conceptual research model that explores how micro-sized tourism enterprises' adoption of strategic orientations—entrepreneurial orientation, market orientation and learning orientation—influences market performance and product-innovation performance through the mediating constructs of market and marketing capabilities. This study emphasizes the critical roles of market capabilities and marketing capabilities in increasing the positive synergetic effect of the three strategic orientations on market and innovation performance that in turn lead to overall business performance. Rural tourism enterprises, given their background origins, have differentiating characteristics that set them apart from other businesses in which the strategic orientations and marketing have been applied. It is expected to suggest that there is the potential for micro-sized tourism enterprises to optimize their business performance by mirroring and adapting the strategic orientations to their specific needs and circumstances, which will influence increasing market capability and marketing capability to lead their market and product-innovation performance.*

**KEY WORDS:** Market capability; Marketing capability; Micro-sized tourism enterprises; Strategic orientations.

INTRODUCTION

A number of scholars and practitioners have investigated strategic orientations and marketing capabilities that lead to business success focusing on small-sized tourism entrepreneurs. While research on small-sized tourism enterprises is well developed, the understanding about micro-sized tourism enterprises (MTEs)—defined as less than 25 employees (U.S. International Trade Commission, 2010)—is very limited. It appears that one of the challenges faced by MTEs should be to increase their market position and share through strategic marketing because most of them have limited tangible business resources which they may not quickly expand. Resource-based (R-B) theory focuses on distinctive organizations' resources for a better understanding of a firm's strategy and performance, emphasizing the importance of possession of resources for entrepreneurship as a condition for success (Aloulou & Fayolle, 2005). However, there is evidence that small-sized enterprises have limitations to increase business resources. On the other hand, in dynamic marketing environments that require aggressive product development,

customer support systems, and highly adaptable product processes, the evolving debate has focused on explaining how resources are deployed to achieve superior firm performance by linking the value of a resource and its application in markets to satisfying customer needs and wants instead of resource possession (Baker & Sinkula, 2009). Although valuable resources contribute to the production of something that customers want (Collis & Montgomery, 1995), resource deployment processes and capabilities that focus on customers and markets would be necessary for MTEs a a priority to implement available business resources to market and innovation performance that influences overall business achievement. In the sense, how MTE resources are deployed to achieve superior firm performance may be essential to anchor the resources and strategic orientations of MTEs to those opportunities. Increased competition, ceaseless economic turbulence, and uncertainty have forced firms to keep on securing business resources and embrace certain strategic orientations as the core business cultures to be implemented for business success. However, it would be more important for small-sized firms to know how enterprises deploy strategic orientations and resources to superior performance, interacting with its external environments and customers (Lee, Choi, & Kwak, 2014).

On the basis of two theories of R-B theory and dynamic capability, this study proposes a comprehensive conceptual model that shows the synergistic effect of the strategic orientations on business performance as mediated by market capabilities and marketing capabilities. More specifically, the study aims to (a) explore entrepreneurial orientation (EO), market orientation (MO), and learning orientation (LO), and market capabilities and marketing capabilities; and (b) test the structural relationship among EO, MO and LO, and market performance and innovation performance examining the mediating role of market capability and marketing capability. This paper adopts the position that firms' strategic orientations may not contribute to business performance in isolation, and the significant benefits and potential synergic effect of strategic orientations—EO, MO and LO—on business performance is positively stronger by the mediating role of market capabilities and marketing capabilities.

## THEORETICAL FOUNDATION

### Micro-sized Tourism Enterprises (MTEs)

MTEs, defined as less than 25 employees (U.S. International Trade Commission, 2010), account for a significant portion of tourism business in rural and peripheral areas (Bertbhon, Ewing, & Napoli, 2008). Research evidence and practices have shown that MTEs are increasingly important with respect to the rural economy in many communities. While the research of small-sized tourism enterprises to job creation and rural economic rejuvenation has been well recognized among community development planners, policy decision makers, and scholars, few studies have been done on MTEs separately in tourism sectors. Micro-sized enterprises have presented similar business characteristics with general small-sized enterprises with additional differentiating characteristics from small-sized enterprises due to its size (Jaouen & Lasch, 2015). Business environment and resources, and management styles and functions in rural locations are different from large-sized corporations (Knight, 2000). Owner-managers are

often the key decision-makers and are responsible for all necessary functions within their management (Bertbhon et al., 2008). A sole proprietor owner-manager is the most dominant management structure of the micro-sized enterprises (Brigham, De Castro, & Shepherd, 2007). There is typically one person in control managing the organization and shaping its business future (Wennekers & Thurik, 1999). Research results show that micro-sized firm owner-managers tend to have no desires and motives for business growth (Jaouen & Lasch, 2015). Micro-sized enterprises usually have business and management resource constraints, both tangible and intangible resources (Bertbhon et al., 2008 ; Cánoves, Villarino, Priestley, & Blanco, 2004). From the perspective of marketing, it is known that micro-sized enterprises' marketing tends to be more reactive, in terms of responding to customer needs and market changes, rather than proactive (Carson & Gilmore, 2000). Due to their business characteristics and constraints, some of the conventional marketing concepts and principles cannot always be fully applied to the micro-sized enterprise context (Carson & Gilmore, 2000). Furthermore, when combined with a lack of marketing expertise and training, more difficulties arise in selecting and implementing marketing mix activities such as selecting target market, conducting market research, finding suitable promotional media, designing content, and interpreting marketing information (Raymond, Brisoux, & Azami, 2001; Huang & Brown, 1999).

Therefore, a number of MTEs seem to have faced a variety of business barriers and constraints to keep on diversifying their business and expanding their tourism products, and establishing a sustainable marketplace position with limited business resources to achieve successful business results. Brown and Kirchhoff (1997) argued that lack of resources does not only limit entrepreneurial activity, but also business growth. Accordingly, considerable effort is necessary to find theoretical and practical perspectives to understand how marketing activities tend to be more effectively adapted to suit the unique needs, circumstances, and abilities of MTEs with business resource constraints (Carson & Gilmore, 2000). To date, little research has been conducted to understand the roles of market and marketing capabilities that appear to be influenced by strategic orientations such as EO, MO, and LO. Since it is not easy to expand their tangible resources quickly and larger without huge financial investment, the specific challenges faced by MTEs should be to increase more proactive strategic marketing behaviors directed towards innovation and quality focusing on market and customers.

## RESOURCE-BASED (R-B) THEORY

Resources are any tangible or intangible entity available to the organization, including all assets, capabilities, organizational processes, firm attributes, information, knowledge, etc. controlled by an organization (Hunt & Morgan, 1995). In the field of strategic management and marketing, R-B theory has been widely accepted as a prominent reference in explaining sustainable advantages and performance differentials among firms (Barney, 1991). According to R-B theory, business resources enable an organization to conceive, choose, and implement strategies to efficiently and effectively produce a market offering that has value for some market segments (Barney, 1991). However, R-B theory has been criticized for its inability to explain how resources are developed and deployed to achieve competitive advantage and its failure to consider the

impact of dynamic market environments (Morgan, Vorhies, & Mason, 2009). As a result, R-B theory has come to include not only a firm's resources, but also its capabilities (Helfat & Peteraf, 2003), emphasizing that organizations should rely on a combination of resources and capabilities in the pursuit of a sustainable competitive advantage (Makadok, 2001). Theorists have made a number of recent developments—collectively labeled “capabilities”—addressing the limitations in traditional R-B theory (Newbert, 2007; Zott, 2003).

Capabilities—referred to as an organization's capacity to deploy and coordinate different resources, usually in strategically combined ways to achieve a desired achievement—have been a special type of resource that enhances the productivity of an organization's other resources (Makadok, 2001). Capabilities are regarded as stable patterns of collective, yet distinct routines, knowledge, and processes that enable firms to transform a variety of inputs into superior value (Amit & Schoemaker, 1993; Ngo & O'Cass, 2012; Zollo & Winter, 2002). Dynamic capability is defined as the firm's processes to integrate, reconfigure, gain and release resources—to match and even create market change (Eisenhardt & Martin, 2000). A number of scholars have argued that while possessing valuable, rare, inimitable, and non-substitutable resources (e.g., strategic orientations) may be beneficial, firms also require complementary capabilities to be able to deploy available resources in ways that match the market conditions faced in order to drive firm performance (Teece, 2007; Helfat, 1997). Srivastava, Shervani, and Fahey (1999) support that the capability based on market may be the most important capability among all the resources and capabilities of an enterprise. Building on this theoretical perspective, this study explores MTEs' market capability and marketing capability that be likely to increase the synergic effect of EO, MO, and LO on greater business performance. In the following section, theoretical foundations and hypotheses are discussed.

## MARKETING CAPABILITIES

Marketing capability is referred to as organizational routines and skills for performing marketing functions related to product, pricing, channel management, marketing communications, marketing planning, and marketing implementation (e.g., marketing mix) (Carson & Gilmore, 2000; Daneels, 2007 ). Marketing capability is an organization's dynamic resource, characterized as core competence that influences its marketing activities and benefits for the enterprise's financial and operational performance (Liu & Wang, 2007). The capability is considered one of the important strategic elements because the market functions bring market advantages and ultimately increase market performance and product-innovation performance (Fang, Chang, Ou, & Chou, 2014; Morgan, et al., 2009). Market performance indicates the relative strength of customer retention, market share, and marketing leading position compared to competitors. Product-related innovation is referred to as new products or services introduced to meet external user market needs (Damanpour, 1991). All market functions help firms create and provide value for customers, keep a strong customer relationship that captures value from the customers, and increase marketing share and secure market position (Kotler, Bowen, & Makens, 2013). Therefore, marketing capability influences

increasing market performance and product-innovation performance, both of which would lead to business performance. Based on the discussion, this study tests the following hypotheses:

H1a: Marketing capability positively influences market performance.

H1b: Marketing capability positively influences product-innovation performance.

## MARKET CAPABILITIES

As a different concept from marketing capability discussed above, market capability represents the combined capacity of sensing the external environment in the target market, and tracking and analyzing current and prospective customers' attitudes and behaviors to know their needs and wants to keep relationships with customers (Day, 1994b; Kropp, Lindsay, & Shoham, 2006). The concept of market capability is conceptualized and operationalized by two subdimensions—market-sensing and customer-linking capability (Day, 1994b). Market-sensing capability is an organization's capability of learning market knowledge and utilizing this knowledge in forecasting the future market development (Day, 1994b; Foley & Fahy, 2004). The information and knowledge of the markets, customers, and competitors serve as an important organizational intelligence for organizations to identify potential markets, customers' needs and wants, and design a series of marketing functions (marketing mix) to attract and keep customers, and hence keep customer relationships in the long term. Market-sensing capability fosters organizations continuously monitoring market changes, then accurately spotting strengths and weaknesses internally, and analyzing opportunities and threats in the external market (Fang et al., 2014). As a result, market-sensing capability appears to positively influence marketing capability referred to as the organizational routine and skill for implementing marketing mix functions and activities. The greater market-sensing capability would lead to the greater marketing capability.

Customer-linking capability is defined as an organization's capability of effectively establishing and maintaining appropriate customer relationships after the organization identifies and understands its target customers' needs (Day, 1994b). An organization's customer-linking capability comes from the organization's efforts to develop interpersonal relationships and tacit knowledge of connecting with customers (e.g., understanding their characteristics and preferences) (Hooley, Greenley, Cadogan, & Fahy, 2005). Customer-linking capability emphasizes an organization's ability to gather sufficient customer information (Homburg & Pflesser, 2000), understand customers' needs and preferences, and provide differentiated offerings (Armario et al., 2008). More important, customer-linking capability stresses establishing, developing, and enhancing relationships with their customers (Gronroos, 1996). In sum, market capability assesses an organization's market position, customer and competitor, and focuses on the firm's relationship with customers, competitors, suppliers, and distributors (Fang et al., 2014). Market-driven organizations that are superior in customer-linking capability can anticipate and respond to changing market requirements and customer needs and wants ahead of their competitors (Day, 1994a). Therefore, the greater customer-linking

capability positively leads to greater market capabilities to achieve a customer-related advantage with respect to customer attraction, customer satisfaction, customer relationship building, and customer retention. Therefore, the following two hypotheses are suggested:

H2a: Market-sensing capability positively influences marketing capabilities.

H2b: Customer-linking capability positively influences marketing capabilities.

## STRATEGIC ORIENTATIONS: DETERMINANTS OF MARKET CAPABILITIES

In this section, the determinants of market capability are discussed focusing on strategic orientations, one of the types of business resources. Strategic orientation is referred to as an overall strategic culture or tendency that influences, as well as directs, the activities and behaviors of a firm in its effort to achieve better performance (Noble, Sinha, & Kumar, 2002; Okumus, 2001). Strategic orientations create proper behavior, capabilities, and processes to interact with and adapt to its external environment (Miles & Snow, 1978) and achieve organizations' prosperity and performance (Avci, Madanoglu, & Okumus, 2011; Lee et al., 2014). Three strategic orientations—EO, MO, and LO—have been gaining more attention since those have been recognized as the core cultures that influence success for many organizations (Dess, Newport, & Rasheed, 1993; Lee et al., 2014). The orientations are guiding principles that influence a firm's culture and marketing and strategy-making activity that then guides interactions with the marketplace, both with customers and competitors (Noble et al., 2002). Therefore, it is likely that those orientations increase market capabilities representing two concepts—market-sensing capability and customer-linking capability.

### *Entrepreneurial Orientation:*

EO refers to a firm's strategic orientation that represents the extent to which the individuals or an organization are inclined to support change to obtain competitive advantage for the firm, take business-related risks, and compete aggressively with other firms. (Covin & Slevin, 1989). It is a multidimensional concept encompassing the organization's actions for processing three-dimensional functional orientations—innovativeness, proactiveness, and risk-taking propensity (Miller, 1983; Miller & Friesen, 1984; Wiklund, 1999). Innovativeness is a general willingness to depart from proven practice or a tendency to engage in new ideas, novelties, and creative processes that may result in new product developments and internal processes (Mengue & Auh, 2006; Miller, 1983). It reflects a basic willingness to diverge from the status quo and embrace new ideas (Baker & Sincula, 2009). Risk-taking is referred to as the degree to which individuals or an organization are willing to make risky resource commitments in which the expected benefits are highly uncertain (Venkatraman, 1989) and there is a chance of costly failure (Miller & Friesen, 1978). Proactiveness is a propensity of anticipating changes happening in the marketplace in the future, thereby taking a first-mover advantage in the pursuit of marketplace opportunities (Lumpkin & Dess, 1996). "With such a forward-looking perspective, proactive organizations capitalize on emerging

opportunities” (Wiklund & Shepherd, 2003, p. 1309). Previous empirical studies are conclusive that EO improves firm performance and growth by enabling a firm’s capacity to identify innovative chances with potential business returns, target premium markets, and first-mover advantages (Lumpkin & Dess, 1996; Wiklund & Shepherd, 2005). However, there are few studies about the EO of micro-sized enterprises, particularly in tourism sectors. EO reflects a firm’s propensity to engage in “the pursuit of new market opportunities and the renewal of existing areas of operation” (Miller, 1983, p. 771). In particular, the emphasis on being proactive towards new opportunities cultivates capacities that enable the firm to create products not only ahead of competitors, but also ahead of the recognition of existing customers (Slater & Narver, 1995). Therefore, the essential outcome of EO is that organizations can increase their capability to increase the information and knowledge of their markets, customers, and competitors, and keep strong relationships with consumers, facing their dynamic competitive market environment. Therefore, the following hypotheses are tested:

H3a: Greater EO leads to greater market-sensing capability.

H3b: Greater EO leads to greater customer-linking capability.

#### *Market Orientation:*

MO is defined as an organizational culture or tendency to engage in the organization-wide generation of market intelligence pertaining to current and future customer needs, competitor strategies and actions, channel requirements and abilities, the broader business environment, dissemination of the intelligence across departments, and organization-wide responsiveness to it (Kohli & Jaworski, 1990). MO, as a business strategy, has been adopted and investigated in the tourism industry in the past decade (Chen & Myagmarsuren, 2013). A number of previous research studies have presented that a firm with superior MO achieves superior business performance because MO directs an organization to make an effort for a greater understanding of customers’ expressed wants and latent needs, competitor capabilities and strategies, channel requirements and development, and broader market environment than their rival (Bansal, Mendelson, & Sharma, 2001; Diamantopoulos & Hart, 1993; Greenly, 1995b; Narver & Slater, 1990; Oczkowski & Farrell, 1998a). MO emphasizes a “know-what” advantage by allowing managers to select the most productive resource combinations to match market conditions (Slater & Narver, 1995). The emerging body of tourism literature has studied the MO as an organizational effort to respond efficiently and effectively to customers knowing their markets, competitors, and changing external environment as a strategic orientation that influences business performance (Altinay, 2010; Bigné, Andreu, Küster, & Blesa, 2005; Chen & Myagmarsuren, 2013; Jakada & Gambo, 2014; Peña, Olmo, Jamilena, & Molina, 2015; Qu, Ennew, & Sinclair, 2005; Sin, Tse, Heung, & Yim, 2005; Wang, Chen, & Chen, 2012). This study presents that the indirect effect of MO on business performance is mediated by market MO which produces sustainable competitive advantage and ultimately superior long-run business performance (Hunt & Morgan, 1995; Homburg & Pflesser, 2000; Kohli & Jaworski, 1990; Slater & Narver, 1995). Therefore, MO as a strategic propensity would foster an organization’s market-sensing and customer-linking capability. The following hypotheses are examined:

- H4a: Greater MO leads to greater market-sensing capability.  
H4b: Greater MO leads to greater customer-linking capability.

*Learning Orientation:*

LO is defined as the organizational culture that emphasizes the process of improving insights, knowledge, and understanding to enhance competitiveness and to improve organizational performance and customer value. LO was conceptualized in three dimensions—commitment to learning, shared vision, and open-mindedness (Sinkula, Baker, & Noordewei, 1997). LO was conceptualized and operationalized as consisting of commitment to learning, shared vision, and open-mindedness as one of the organizational strategic orientations that affects the organization's propensity to value generative and double-loop learning and encourage its members to think outside the box (Sinkula et al., 1997). LO is reflected in increased efforts by the employee to actively expand his or her existing repertoire of technical and social skills, thus learning new and better ways of interaction with customers, basically reflecting the process of learning within the organization which starts at the individual level and extends to the organizational level (Nasution, Mavondo, Matanda, & Ndubisi, 2011). Past empirical studies presented the positive effects of LO on market performance, firm innovation, and performance (Lee et al., 2014). Despite its economic significance, LO relatively has been examined in the travel and tourism sector and understanding of the factors that drive MO is, at best, limited. This study posits that LO influences market capability because an entire organization is in the organizational learning culture where people try to learn marketplaces and hence increase market-sensing capability and customer-linking capability. The following hypotheses are tested:

- H5a: Greater LO leads to greater market-sensing capability.  
H6b: Greater LO leads to greater customer-linking capability.

The findings of previous research have reinforced that an entrepreneurial-oriented, market-oriented, learning-oriented culture enhances organizational performance. However, there are few studies that reveal how EO, MO, and LO is deployed into superior market and innovation performance (Langerak, Hultink, & Robben, 2004). To determine how critical market and marketing capabilities is for MTEs, this study investigates the structural linkages among MO, EO, LO, market capability and marketing capability, and market performance and innovation performance (Figure 1). In particular, as shown in Figure 1, the focus in this study is on the mediating role of market capability and marketing capability between three strategic orientations, and market performance and product-innovation performance as a business performance indicator.

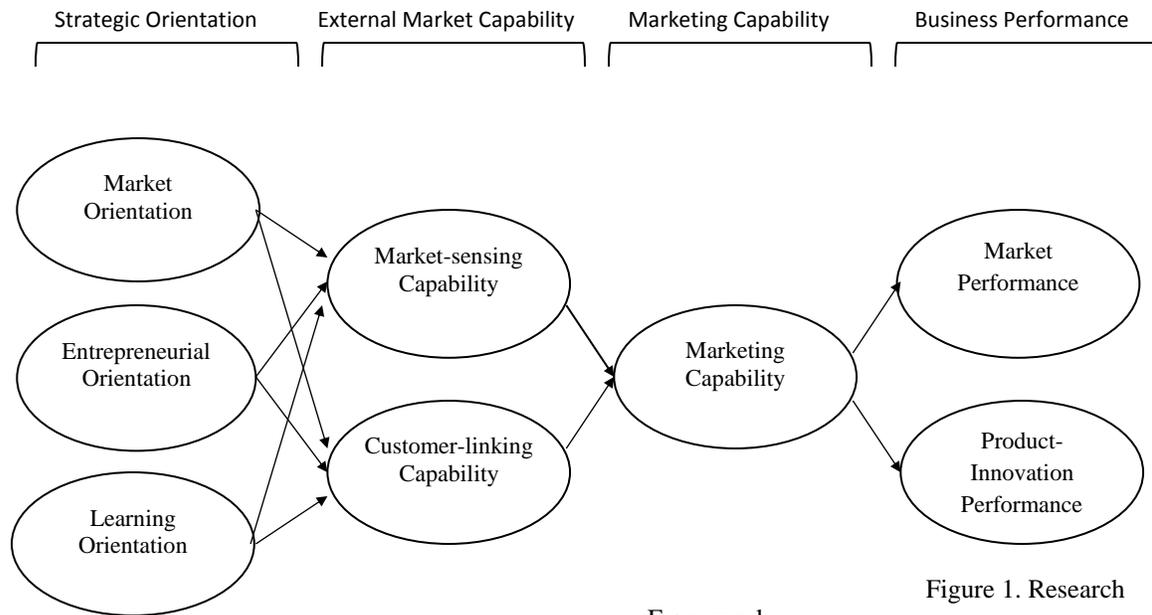


Figure 1. Research Framework.

## RESEARCH METHODOLOGY

### Data Collection and Sample

The sample frame of this study will be a directory of tourism businesses ( $n = 2,128$ ) in a Midwest state. After data collection through an online survey, the sample list will be filtered by the definition of MTEs (less than 25 employees) in rural areas to further test the research model and hypotheses. Online surveys will be undertaken following the procedure recommended by Dillman (2007). First, the online questionnaire will be emailed to the tourism businesses with a cover letter, the web links of the online consent form, and questionnaire. Second, after a week, a first online reminder will be emailed out to all in the sample frame with a cover letter. Finally, the reminder of the online survey is sent out again at 3 weeks and 4 weeks, respectively. The online questionnaire reminder will be sent out only to all nonrespondents to the first and second questionnaire survey.

### Operationalization and Measurement

The survey questionnaire is designed based on construct items from existing literature. All items of the variables in the research model (Figure 1) are measured using a 7-point Likert scale anchored with 1 = *strongly disagree* and 5 = *strongly agree*. Modifications are made to take into account both the specific characteristics of the tourism domain as well as micro-size businesses in rural areas. The present study uses existing measurement scales of EO developed by Eggers, Kraus, Hughes, and Laraway (2013), Covin and Slevin (1989), and Miller and Friesen (1984). A multidimensional EO scale is operationalized into three dimensions—innovativeness (five items), risk-taking (four items), and proactiveness (five items). MO is measured by 32 items based on the

work of Jaworski and Kohli (1993). Of the items, ten pertain to market intelligence generation, eight to intelligence dissemination, and fourteen to responsiveness. LO is measured by the scale developed by Sinkula et al. (1997). The scale of LO is composed of three dimensions—commitment to learning (five items), shared vision (six items) and open-mindedness (four items). Market capability is measured by the scales developed by Day (1994b), and Day and van den Bulte (2000). Marketing capability is measured by two subdimensions—market-sensing capability (three items) and customer-linking capability (four items). Organizational performance is scaled by two organizational achievements—market performance and product-innovation performance. Market performance is scaled by three items used by Margan and Turnell (2003) and product-innovation performance by four items by the study of Damanpour and Gopaladrishnan (2001) and Oke (2007). To account for the effects of extraneous variables, business- and operation-related variables such as business types and size, operation year, and product category, and owner-manager socio-demographic information such as age and education are included.

## ANALYTIC APPROACH

First, the sample profile is analyzed based on descriptive analysis using SPSS 22. Frequency and mean analysis is undertaken. Second, in order to test the research model and hypotheses, structural equation modeling (SEM) analysis is undertaken (Jöreskog & Sörborm, 2002). Based on a two-step approach (Anderson & Gerbing, 1988), it is a first step to assess the validity of the measurement scales through a confirmatory factor analysis (CFA) that specifies the structure between a set of observed variables measured by multiple items and a predetermined number of latent constructs. To get a parsimoniously represented measurement model, this study uses an aggregation approach to group multi-items into subdimensions (Bagozzi & Heatherton, 1994). To assess adequate internal consistency and unidimensionality, loading values, composite reliability, convergent validity, and discriminant validity are statistically tested (Anderson & Gerbing, 1988; Fornell & Larcker, 1981). Second, the conceptual research model is tested and then the relationship between constructs based on the suggested hypotheses. To do so, the study assesses goodness-of-fit indexes to assess model fit: Chi-square ( $\chi^2$ ), normalized Chi-square ( $\chi^2/df$ ), normed fit index (NFI), nonnormed fit index (NNFI), and comparative fit index (CFI) based on the recommendation of Raykov, Tomer, and Nesslerode (1991). In addition, a widely used misfit index, the root mean square error of approximation (RMSEA), is used. NFI, NNFI, and CFI greater than 0.90 indicate an acceptable fit (Hu & Bentler, 1999) and RMSEA less than 0.05 indicates a good fit.

## EXPECTED RESULTS

The purpose of this research paper is to propose a conceptual model that shows how MTEs' adoption of strategic orientations of EO, MO, and LO influence market performance and product-innovation performance through the mediating constructs of market and marketing capabilities. It is expected to present the following theoretical and practical contributions to the existing literature on MTEs. First, this study will show the adoption of strategic orientations—EO, MO, and LO of MTEs—and the critical roles of

market capabilities and marketing capabilities in increasing the positive synergetic effect of the three strategic orientations on market and innovation performance that in turn lead to overall business performance. Second, this study will bring practical implication for rural MTEs that require economic drivers other than farming or agricultural businesses. Rural tourism enterprises, given their background origins, have differentiating characteristics that set them apart from other businesses in which the strategic orientations have been applied. MTEs account for significant employment, innovation, and social and economic growth in both rural and peripheral areas. Managers of large corporations, with significant business resources and marketing budgets, have an abundance of information (albeit not all empirical) to guide their marketing and business efforts. However, MTEs in rural and peripheral areas have limited resources and business training opportunities. In this sense, it is imperative for both academicians and practitioners to enhance MTE theory, practice, and methodology in strategic management and marketing. This study emphasizes the importance of external market and marketing capabilities that likely mediate the relationship between three strategic orientations of MTEs—EO, MO, and LO—and MTEs' market and product-innovation performance. This suggests that there is the potential for MTEs to optimize their business performance by mirroring and adapting the strategic orientations to their specific needs and circumstances, which will influence increasing market capability and marketing capability to increase their market and product-innovation performance.

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# FARMERS' MARKETS AS A NEXT DESTINATION: IMPLICATIONS FOR MILLENNIALS

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## ABSTRACT

*Researchers in diverse disciplines have investigated farmers' markets, exploring benefits (such as local economic development benefits and health benefits associated with eating fresh food) as well as investigating factors related to the success of farmers' markets as local destinations. In particular, studies in consumer behavior have tried to understand consumers' motivation and decision-making processes in the context of farmers' markets. While it has been well documented that farmers' markets are critical components of many local economies, relatively few studies have investigated young consumers such as the millennial generation or Generation Z and their connection to farmers' markets. As such, this study is designed to examine the relationship between personal values, attitude, and intention to purchase at farmers' markets by millennial generation consumers. In particular, this study investigates personal values based on Kahle's (1983) List of Values (LOV), which examines internal and external consumer values. Among various consumer values, this research places emphasis on two aspects of personal values: (1) internal values such as self-respect, which are proposed to have a positive effect on one's awareness of positive health benefits, increasing intention to purchase local products from farmers' markets; and (2) external values which focus on the importance of interpersonal relationships. The findings of this study are expected to help local farmers and researchers by depicting the importance of future consumers such as the millennial generation and their connection to farmers' markets as local destinations.*

**KEYWORDS:** Farmers' markets; Millennial generation; Consumer behavior; Personal values

## INTRODUCTION

The desire for a stronger connection to wholesome, fresh foods within the US can be seen through numerous movements and initiatives focused on changing America's food system. These movements include: the organic movement, Michele Obama's obesity campaign, sustainable agriculture schools and classes, local foods campaigns and

advocacy groups, community supported agriculture programs (CSAs), farmers' markets, local foods co-ops, and agritourism (i.e., farm tourism) events and venues offering on-farm experiences for visitors. Bestselling books such as *The Omnivore's Dilemma* (2006) by Michael Pollan, *Fast Food Nation* (2001) by Eric Schlosser, and *Animal, Vegetable, Miracle* (2007) by Barbara Kingsolver address current trends in the American food system. The status of these books as bestsellers implies market interest. Communities of "locavores," or people opting to eat only locally grown foods (Delind, 2011; Martinez, et al., 2010), and popular new diets such as "The 100 Mile Diet," which encourages consumption of foods produced within a 100 mile radius of one's home, are on the rise (Smith & MacKinnon, 2007).

Additionally, the number of farmer's markets in America increased by 71% in the last decade (Mishkovsky, 2009). According to the U.S. Department of Agriculture (USDA), the number of farmers' markets in the US has increased from 1,775 to 8,284 over the last 7 years (USDA, 2014). The number of CSA programs in the U.S. rose from two in 1986 to more than 1,400 in 2010 (Martinez, et al., 2010). Additionally, approximately three million consumers purchase food at local farmers' markets weekly (Egan, 2002). The increased popularity of farmers' markets has also provided positive benefits on food consumption, local economies, the environment, and society. (Guthrie, et al., 2006; Conner, et al., 2009). In 2007, 56% of sales on U.S. produce farms were direct-to-consumer sales. Further, "direct-to-consumer sales are higher for farms engaged in other entrepreneurial activities, such as . . . tourism" (Martinez, et al., 2010, p. iv). These trends indicate consumers' increasing desires to reconnect and/or more intimately connect with their food source (i.e., farmers).

Existing studies on farmers' markets have investigated reasons for visiting the markets and visitors' characteristics. Consumers visit farmers' markets for various reasons including quality, variety, freshness, interests in locally grown produce, and atmosphere of the market (Onianwa et al., 2005). Additionally, consumers who frequently buy fresh produce directly from farmers' markets indicate the importance of high product quality, freshness and safety, as well as organic production process, and positive atmosphere. (Bond et al., 2006; Andreatta et al., 2002; Govindasamy, 2002). Lyon et al. (2009) also stated that consumers respect the high quality of products and shared emotions around the farmers' market. Several studies reported that price is another critical factor in their decision to shop at the market. (Gallons et al., 1997; Eastwood, 1996).

Previous research has examined why consumers visit farmers' markets and the factors that encouraged visitation or non-visitation. Studies have examined the benefits of farmers' markets, including personal benefits such as promoting healthy eating behaviors (e.g., providing fresh food for consumers) as well as broader benefits such as economic impacts on local businesses (Conner, et al., 2006). Other studies have demonstrated positive environmental impacts such as soil preservation through farming techniques and the organic production process (Byron Shire Council, 2007). From a consumer standpoint, Hunt (2007) suggested farmers' markets provide consumers with additional values such as relationship building with local farmers as well as fun and

excitement for the consumer. Adams (2003) found consumers enjoyed helping the local economy by patronizing farmers' markets and appreciated the influence farmers' markets have on reviving public places in towns as well as generating community spirit, all of which can help to strengthen rural and urban connections.

Although previous studies demonstrate the economic impact of farmers market on rural economy and agriculture, a few studies have investigated the relationship between farmers market and its impact on tourism industry. It is known that rural tourism is based on resources available in town, and generally farms or farm-related events (Fleischer & Tchetchik, 2005). Although farm-based tourism and its impact have been addressed in European countries, limited research has been undertaken in the US due to a gap among consumers, farmers, and policy makers (Sharpley & Vass, 2007). Due to the lack of understanding regarding marketing perspectives including consumer promotion from the farmers' point of view as well as the long-term benefits of farm-based tourism, farmers have been somewhat reluctant to participate or promote farm-related tourism. However, understanding farmers' market consumers can provide farmers with an opportunity to learn more about these customers as well as their interests in further farm-related tourism. Additionally, selling fresh products directly to consumers and other activities such as cooking demonstration can be a great promotion for farm-related tourism.

Through personal interactions with producers and sellers, consumers are able to communicate directly with their farmer and with each other, and also gain improved knowledge and appreciation of the agricultural processes used to grow their foods. This results in increased consumer confidence, awareness of food production systems, and more efficient purchases (Guthrie, et al. 2006). Others studies have focused the farmer's perspective. Farmers have experienced 40-80% increased profits by selling at farmers' markets, as they do not need to rely on formal marketing channels (Andreatta & Wickliffe, 2002).

Given the numerous benefits of farmers' markets as evidenced in the literature, it is critical to understand consumer demographic characteristics, their behaviors, motivations, and preferences for farmers' markets on these attributes. However, existing studies tend to focus on discussing the typical farmers' market visitor who is likely to have a higher education, is a married female, aged 45 years old or older, with above average income, living in urban areas (Eastwood et al., 1999; Onianwa, Mojica, M., & Wheelock, 2005; Wolf, 1997; Kezis et al.). However, recent consumer behavior research demonstrates the importance of the millennial consumer since this generation is considered be a promising market with disposal income and buying power (Horovitz, 2012; Williams & Page, 2011). Few studies have investigated the impact of the millennial generation on farmers' markets or local food consumption. Compared to previous generations, millennial consumers are information/technology rich and concerned about social and global issues (Bhaduri & Ha-Brookshire, 2011). This generation is likely to exhibit different lifestyle characteristics, engagement behavior with brands, and food consumption patterns related their lifestyle (Jang, Kim, & Bonn, 2011; Maheshwari, 2013). Thus, it is crucial to understand what influences millennial consumers to patronize farmers' markets.

According to the 2010 US Census, more than 93.4 million people are considered as millennials. Previous research on the millennial generation as indicated a generational difference as well unique consumer purchase patterns (Young & Hinesly, 2012). According to Kaylene and Robert (2010), the values and attitudes of Generation X consumers are different from Millennials. While millennial consumers tend to value balanced family, life, and work (Lager, 2006), millennial consumers are likely to have different shopping styles and motivations (Tuomela, 2010). Traditional shopping factors such as price and quality are important for millennials. According to Williams and Page (2010), values and attitudes of generation X consumers are different from millennials. Millennials have been described as individualistic, well-educated, technologically savvy, sophisticated, mature, and structured (Krotz, 2005). Hymowitz and Carol (2007) also indicate that millennials are less cynical, more optimistic, more idealistic and unique. Additionally, this generation is supportive of social causes and socially responsible companies (Hill & Lee, 2012). Millennials demonstrate low levels of brand loyalty and they are described as self-centered, environmentally conscious individuals, who will spend more money on ethically produced products than previous generations (Brand Amplitude, 2009; Greenberg, 2011).

Additionally, millennials consider value and seek brands that resonate with their peers. Their peers often guide product and brand choice. Kim and Jang (2014) found that millennials have a greater need for peer acceptance. In particular, female consumers are likely to purchase luxurious products or organic foods when they recognize the existence of peers. In consumer behavior research, consumer values are widely employed to understand consumers' preference or judgment towards products (Rokeach, 1968). Personal values reflect people's desired "ultimate end-states of existence." Thus, values are often adopted to explain consumers' attitudes, preferences, and behavioral intentions. McCrindle (2003) indicated that millennials live in a culture that encourages them to embrace values.

So far, the millennial generation has not been a major high spending group of consumers. However, as this generation transitions into jobs and start families, they will become major players in consumption (Detre, Mark, & Clark, 2010). This consumer group has received little attention from researchers in the context of farmers' markets or rural tourism (Noble, Haytko, & Phillips, 2009). Thus, this research particularly aims to investigate millennial generation in the context of farmers' markets.

Based on the literature, this study proposes that the uniqueness and community-centric values, especially peer acceptance and community involvement will act as independent variables in purchasing at farmers' market for millennials. Given it is important for millennials to be involved in certain communities and have connections with peers or friends, they rely on their community's or peers' opinions and experiences when purchasing food. Also, they prefer unique rather than ordinary purchases. This suggests that millennials will prefer farmers' markets over supermarkets or grocery stores and utilize farmers markets as a destination to feel a sense of community.

## HYPOTHESIS DEVELOPMENT

### Personal Values and Attitude Toward Farmers' Markets

Homer and Kahle (1988) suggested a relationship between personal values and attitude. They assessed personal values with nine value dimensions including (1) fun and enjoyment in life, (2) self-fulfillment, (3) excitement, (4) a sense of accomplishment, (5) sense of belonging, (6) security, (7) being well respected, (8) self-respect, and (9) warm relationships with others. Previous studies have demonstrated that personal values can have a positive or negative relationship with attitude regarding food. For example, Homer and Kahle (1988) reported that personal values have a positive effect on attitudes to purchase nutritious products. Rotter (1996) found that individuals who tend to control and manage their lives are likely to care about the food they eat. Arnold and Reynolds (2003) reported that individuals who enjoy socializing with others tend to shop with others to increase a sense of belonging. Similarly, Conner, Campbell, and Hamm (2008) reported that customers who go to farmers' markets hope to establish relationships with farmers and other customers. Thus, familiarity with the farmers' market, as well as other consumers, will provide socialization opportunities (Hunt, 2007). As such, the following is hypothesized:

*H1: Personal values are positively related to attitude towards farmers' markets.*

### External Values and Attitude Toward Farmers' Markets

According to Homer and Kahle (1998), external values consist of sense of belonging, being well respected, and security. Arnold and Reynolds (2003) found that individuals who enjoy socializing with others while shopping seek opportunities to shop with others in order to increase bonds with other shoppers. Conner, Campbell-Varvai, and Hamm (2008) examined relationship building as one of the key values for customers at farmers' markets. This relationship value can include a range of familiarity, including extended friendships between growers and consumers, and conversations at farmers' markets. Additionally, consumers who shop at farmers' markets consider this experience as a socialization opportunity with family and friends, as well as farmers by communicating with them about seasonal produce at the farmers market (Hunt, 2007). Thus, it is expected that individuals who possess external values enjoy socializing with others at farmers' markets, developing favorable attitudes toward farmers' markets. Therefore, the following is hypothesized:

*H2: External values such as is positively related to attitude toward farmers' market.*

### Attitude Toward Farmers' Markets And the Intention To Purchase At Farmers' Markets

The theory of planned behavior states that a consumer's attitude towards a certain behavior predicts an individual's intention to engage in that behavior (Ajzen & Fishbein, 1977). Thus, the more favorable a person's attitude is toward some considered behavior, the more likely that person will want to engage in the behavior (Hansen 2008). Research

has addressed the value-attitude-behavior hierarchy model to examine how values (external and internal values) influence attitude, and in turn influence behaviors (Homer & Kahle, 1988). Kahle (1980) examined the relationship between personal values and attitude, and found personal values have an indirect effect on shopping behavior through attitudes. Therefore, it is plausible that consumers' favorable attitudes toward farmers' markets will positively influence their intention to purchase and spend time at farmers' markets for their needs. Thus:

*H3: Attitude towards farmers' markets is positively related to intention to purchase at farmers' markets.*

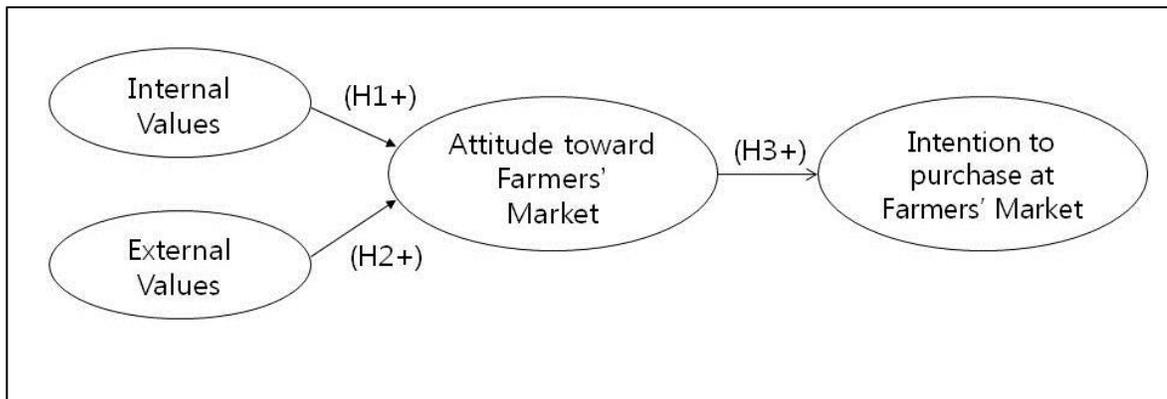


Figure 1. Conceptual Model

## METHODS

Measurement items were developed from previous work examining consumer behavior and personal values (e.g., Kahle, 1983), and the theory of planned behavior (Ajzen & Fishbein, 1977). The questionnaire consisted of several multi-item constructs including the List Of Values scale, attitudes, and behavioral intention towards farmers' markets. All items were measured with a 7-point Likert- scale (1 = strongly disagree and 7 = strongly agree) except attitude and behavioral intentions.

Personal values were adopted from the List of Values (LOV) scale, which consists of nine items (sense of belonging, excitement, fun and enjoyment of life, warm relationships with others, self-fulfillment, being well-respected, sense of accomplishment, security, and self-respect) (Kahle, 1983). These nine values were measured using a seven-point Likert-type scale (1 = not important at all, 7 = extremely important). The LOV scale (Kahle, 1983) has been widely used to address personal values given the scale's simplicity of application and high reliability. It has also established its utility in cross-cultural administrations (Beatty, Kahle, & Homer, 1991; Goldsmith, Freiden, & Kilsheimer, 1993). The attitude and intention variables were developed to assess the degree to which a person had a favorable or unfavorable evaluation of the purchasing food at farmers' market. Attitude and behavioral intention were measured based on a seven-point semantic differential scale including six bipolar adjectives: attitude (positive

vs. negative, wise vs. unwise, positive vs. negative) and behavioral intentions (little vs. high chance, unlikely vs. likely, uncertain versus certain) about future purchase (Smith & Robinson, 2002; Vermeir & Verbeke, 2006). Examples of measure items for each construct are presented in Table 1.

Table 1. Examples of measurement items

Constructs	A Example of Measurement Items	Source
Internal values	<ul style="list-style-type: none"> <li>• Fun and enjoyment in life</li> <li>• Self-fulfillment</li> </ul>	Homer, P. M., & Kahle, L. R. (1988).
External values	<ul style="list-style-type: none"> <li>• Sense of belonging</li> <li>• Warm relationship with others</li> </ul>	Bissonnette, M. M., & Contento, I. R. (2001).
Attitude to purchase at farmers market	<ul style="list-style-type: none"> <li>• Purchasing foods at farmers market is: (1=extremely negative, 7=extremely positive)</li> <li>• Purchasing foods at farmers market is (1= not useful, 7= useful)</li> </ul>	Robinson, R., & Smith, C. (2002).
Intention to purchase	<ul style="list-style-type: none"> <li>• The likelihood that I will buy foods at farmers market in the future is (1=highly unlikely, 7=highly likely)</li> </ul>	

Due to preliminary nature of this study, the questionnaire was distributed to college students in a southeastern US university (n = 222). The questionnaire was distributed in several classes, and students who participated in the survey were received extra credit for compensation. A total of 222 completed surveys were collected. After excluding 20 incomplete and 3 ineligible surveys, 199 responses were usable, yielding a response rate of 90%. Given the focus of this study regarded the millennial generation (28 years old or younger), participants who exceeded this age were excluded.

## RESULTS

### Sample Characteristics

The sample was comprised of both males (32.2%) and females (67.8%). Respondent ages ranged from 18 to 28 with a mean age of 22.5. Among them, 90.1% of participants had never been married and 92.1% were Caucasian. Out of 4 income categories, the largest group (98.5%) had an annual income of below \$20,000. As expected, 94.1% of participants were full-time students. When respondents were asked about their most often-shopped grocery store, respondents indicated Wal-Mart (50.0%), Kroger (37.1%), Food Lion (4.0%), and Other, including Sam's Club and Aldi (10%). Almost 51% of respondents had purchased the food at a local farmers' market and 49% had never purchased anything from the farmers' market. Cronbach's alphas for all constructs demonstrated strong internal consistencies, with .94 (personal values), .86 (health consciousness), .93 (attitude toward farmers' market), and .97 (intention to purchase at farmers' market).

### Data analysis and Testing of Hypotheses

Confirmatory Factor Analysis (CFA) was conducted to test the validity of the measurement model. The model included all four latent variables: internal values, external values, attitude, and intention to purchase at farmers' market. Five items were removed from the model because of cross-loading with other constructs and low factor loading. The final measurement model demonstrated a good fit:  $\chi^2 (111) = 170.98$ ,  $p < .001$ ,  $\chi^2/df = 1.54$ , CFI = .98; TLI = .97; GFI = .91; RMSEA = .05. Convergent validity was investigated and verified based on three criteria: (1) factor loadings were highly significant ( $p < .001$ ), (2) internal consistency of reliabilities was investigated based on factor loadings: all variables ranged from .73 to .96, which were above the threshold of .70 (Nunnally & Berstein, 1994), and (3) Average Variance Extracted (AVE) estimates for all of the four variables were between .70 and .85, exceeding the cutoff of .50 (Fornell & Larcker, 1981). Discriminant validity was examined based on a series of chi-square difference tests, and the results demonstrated  $\Delta\chi^2 [1]$  ranging from 82.209 to 101.23 at  $p < .001$ .

The structural model had a good fit to the data:  $\chi^2 (113) = 172.34$ ,  $p < .002$ ,  $\chi^2/df = 1.525$ , CFI = .98; TLI = .97; GFI = .91; RMSEA = .05. H1 examined the relationship between personal values and attitude toward the farmers' market ( $\beta = .22$ ,  $p < .001$ ). H2 examined the relationship between health consciousness and attitude toward the farmers' market ( $\beta = .44$ ,  $p < .002$ ). H3 predicted the relationship between attitude and intention to purchase ( $\beta = .77$ ,  $p < .001$ ). The results of structural equation modeling confirm all hypotheses are supported on a statistically significant level.

## DISCUSSION AND IMPLICATIONS

Farmers' markets are often seen as a critical factor for rural and local economic development. In spite of its increasing importance in local economies and in society, few studies have investigated consumers' behaviors in the context of farmers' markets. In particular, little is known about what motivates millennial customers to patronize farmers' markets. To extend the knowledge on farmers' market consumption, this study assessed millennial consumers' motivations and how individual's values influence intention to purchase at farmers' markets. The results of this study indicate personal values and health consciousness had an indirect influence on intention to purchase at a farmers' market through their attitude toward the farmers' market. This finding supports previous research, which links self-identity and health consciousness to attitude to purchase organic foods (Michaelidou & Hassan, 2008). The findings of this study indicate the importance in understanding consumers' personal values. In particular, this study demonstrates that the millennial generation pays attention to themselves as well as their peers at the same time, which demonstrates a difference from other generations. In previous literature, personal values were often utilized with two dimensions (i.e., internal vs. external). Consistent with existing literature on personal values, these findings indicate that internal and external values are as important for millennials when they make a purchase decision. Thus, the results of this study suggest that the marketers and farmers need to provide a welcoming environment to help promote a sense of belonging and foster warm relationships with others (external values), as well as provide

excitement and fun/enjoyment (internal values).

Regarding the relationship between attitude and intention to purchase products at farmers' markets, results of this study support the finding of Ajzen's (1991) theory of planned behavior in which positive attitude leads to behavioral outcome. Therefore, vendors at farmers' markets should provide products and services that can increase positive attitudes toward farmers' markets and their individual farms and enhance the potential to gain tourism dollars through increased on-farm opportunities.

## LIMITATIONS AND FUTURE STUDY

While this study provides some unique insights and contributes to existing literature, there are several limitations of this study that can be addressed in future studies. First, this study recruited participants from one university. In the future, it would be more fruitful to collect the data from several different universities so that the results of this study could be generalized. Second, the target generation for this study was millennials. Although understanding the millennial generation is critical since they possess great potential buying power, it would be worthwhile to compare results based on several generations (e.g., Generation X and millennials). Additionally, the participants of our study were mainly Caucasian (92%) (representative of the university student composition). Future studies should include consumers from various ethnic backgrounds. Lastly, this study included participants who have never purchased at farmers' markets as well as individuals who purchased regularly from farmers' markets. Research should compare these two groups (purchased vs. never-purchased) in the future.

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## FROM DARK TOURISM TO SENSITIVE HERITAGE SERVICESCAPES

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### ABSTRACT

*This paper investigates managerial perspectives related to dark tourism servicescapes and visitor engagement at authentic sites linked to the Holocaust and Nazi Germany atrocities. As extant sites of tourist visitation, dark heritage sites are complex servicescapes, representing a sensitive, multi-vocal, dissonant and painfully difficult distant heritage. The challenge of such sites today is to 'speak', provide meaning and relevance to a new generation and contemporary society through remembrance, learning, reflection and self-introspection. The paper provides a review of dark tourism concepts, applying the servicescape literature to dark heritage sites. An in-depth case-based method was used to investigate the nature of (authentic) dark heritage site servicescapes and to uncover site managers' perceptions of: the role and nature of the servicescape; the key issues related to visitor engagement. Dark heritage sites seek to become sites of sensitive heritage experience, focused on today's visitor, his/her social engagement and potential for a transformative experience.*

**KEYWORDS:** dark tourism, memorial education, sensitive heritage tourism management, servicescape management.

### INTRODUCTION

It is evident that most societies bear the scars of history and often of 'involvement in war and civil unrest or adherence to belief systems based on intolerance, racial discrimination or ethnic hostilities' (Logan and Reeves 2009, p.1). There is evidence of the growing interest in the heritage associated with dark events of the past at both international and national levels. Increasingly, the consumption of recent and distant traumatic events has become a pervasive part of the visitor experience, placing dark tourism firmly within the visitor economy (Stone 2013).

Sites (re)presenting death, genocide, events of the Holocaust and Nazi Germany

atrocities are regarded as heritage sites. More precisely termed as *memorial sites and museums*, such ‘deathscapes’ are consumption settings for a ‘heritage that hurts’ (Uzzell and Ballantyne, 1998), inherently multi-vocal, dissonant and painfully difficult. For these are ‘sites of dissonant heritage, sites of selective silences, sites rendered political and ideological, sites powerfully intertwined with interpretation and meaning, and sites of the imaginary and the imagined’ (Stone, 2013, p.308). These sites are most often situated within former concentration camps and depict the complex dark events perpetrated by Germany’s National Socialism during WWII which led to the death and suffering of millions of peoples (dark heritage).

Since their liberation and for the best part of the 20<sup>th</sup> century, these notorious sites attracted as a majority, visitors with deep emotional and historical links to their tragic history (survivors/ former inmates and other categories of eyewitnesses, along with their families and friends). More recently, and coinciding with the growing chronological distance from the original events, changes in the history/education curriculum taught in most nations’ schools and various shifts in the social, economic and political narrative at national and international levels, a new generation of visitors arrive at these sites in vast numbers. In 2014, the site of the former Auschwitz – Birkenau camp was visited by a record 1.53 million people (Auschwitz- Birkenau, 2014).

Such shift in the visitor type presents a new challenge for marketing and management at dark heritage sites, places and institutions that stand as legacy to painful periods in humanity’s history. As beyond all other purposes, the mission of such sites is to trigger and reinforce the responsibility of each person for a more humane and caring world, and for understanding that each individual’s own choice and action (or non-action) bears consequences. Through learning about these dark events, remembrance, reflection and self-introspection, memorial sites ‘are vested with the responsibility to enlighten society on the atrocities of the Nazi regime, strengthening society’s commitment to humanistic values and deterring potential genocidal developments’ (Lapid, 2013, p.2).

The overall research question and focus of this study is to investigate what site managers need to provide in terms of a servicescape and how best to facilitate visitor interaction and engagement at dark heritage sites. In doing so this study recognises that heritage sites are places where cognitive and emotional processes occur as a result of the interactions between visitor and servicescape.

The concept of servicescape is widely recognised in the services marketing literature and relates to the nature and scope of a place where services are delivered and experienced. Dark heritage tourism sites provide a unique context for the appraisal of how the servicescape concept can provide a useful framework to illustrate and help to evaluate the challenges for the effective management of such sites. Heritage site management entails creating a holistic, meaningful experience for visitors encountering complex and diverse servicescapes. In the context of these dark, painful and sensitive heritage sites, the challenge is to ensure both responsible management of this unique heritage site servicescapes and the facilitation of meaningful visitor interactions.

## DARK TOURISM

A review of the dark tourism literature reveals a lack of agreement on an accepted definition, with various authors promoting their own definition and interpretation of dark tourism (Sharpley, 2005; Stone, 2006; Stone and Sharpley, 2008; Sharpley and Stone, 2009). Lennon and Foley (2000) identify dark tourism as visitations to sites, associated with death, disaster and depravity. The literature also often refers to dark tourism as thanatourism, using the two terms interchangeably, making use of Seaton's (1996, p.240) definition of thanatourism as 'travel to a location wholly or partially motivated by the desire for actual or symbolic encounters with death, particularly but not exclusively, violent death, which may, to a varying degree be activated by the person-specific features of those whose death are its focal objects'. Seaton's (1996; 1999) definition is useful in linking thanatourism to tourism motivation (i.e. thanatouristic motivation), describing it as 'a widespread and old established motivation, though one which has previously eluded the literature of motivation' (Seaton, 1999, p.131) and one that evokes 'feelings for the particular people who have died (personal, nationalistic, or humanitarian)' (Seaton, 1996, p.243). Adopting a wider exploration of the complexities of this field, Tarlow (2005, p.48) defines dark tourism as 'visitations to places where tragedies or historically noteworthy death has occurred and that continue to impact our lives', thus taking cognisance of people's motives for travelling to dark sites, and the potential impacts of such dark encounters, for both individual and society. For Tarlow (2005), Europe, as a continent filled with evidence of bloody wars, mass graves and sacred spaces celebrating the dead, is a model of dark tourism. He accepts the interchangeable, alternative term of thanatourism, pointing to the nature of the events it refers to, 'which are more than just tragedies in history, but rather touch our lives not merely from the emotional perspective but also impact our politics and social policies' (Tarlow, 2005, p.49).

The link between sites of death, genocide and suffering and heritage sites is well encapsulated by the notion of 'atrocities heritage' (Tunbridge and Ashworth, 1996), as well as by other terminology centred on the same link: 'heritage that hurts' (Uzzell and Ballantyne, 1998), 'heritage of atrocity' (Ashworth, 1996), 'difficult heritage' (Logan and Reeves, 2009; Knusden, 2011) or simply put, 'places of pain and shame' (Logan and Reeves, 2009). It is clear why such tourism was defined as 'heritage that many might wish to disown even while they acknowledge it to be part of their defining history' (Macdonald, 2006, p.127), or linked to 'sites of conscience' (International Coalition of Sites of Conscience, 2012).

The fact that sensitive heritage linked to the events of the Holocaust and the Nazi Germany atrocities is unavoidably poly-vocal and characterised by the condition of dissonance, hence the term 'dissonant heritage' (Tunbridge and Ashworth, 1996), is well accepted by both scholars and practitioners in the field. The very nature of the events of such painful past and their accompanying narratives and representations often carry discordance, various and varying individual and 'national shades' (Lapid, 2013) or lack of consistency. Dissonance in heritage should not therefore be regarded as unforeseen or unfortunate (Graham and Howard, 2008); consequently, marketers and managers need to

consider and manage it.

While it is important to highlight the various definitions of dark tourism that have been advanced over the last two decades or so, and the continuing effort towards reaching full agreement on a universal definition, the recent literature (Biran and Hyde, 2013) does guide towards accepting Stone's (2006; 2013) wider definition of dark tourism, which links the ideas of death and tourism: 'the act of travel to sites of death, disaster or the seemingly macabre' (Stone, 2006, p.146; 2013, p.307). Such wider, more flexible definition emphasises the multi-faceted nature and complexity of dark tourism, and the potential to explore it through a variety of new, innovative frameworks, criss-crossing traditional disciplinary borders (Stone, 2011a), including those of tourism and business management (Biran and Hyde, 2013). The cross - disciplinary approach presents the potential to investigate the complex and diverse relationships between the supply and demand of dark heritage tourism encounters, the multitude of ways of presenting and consuming death and the painful past, as well as the subjective and diverse nature of visitor experiences, within which education, memorialisation and commemoration continue to feature significantly (Stone and Sharpley, 2008; Stone, 2012).

A significant body of academic work is centred around the investigation of tourists visiting sites that display dark attributes (for example, physical evidence and artefacts relating to death or extermination) where tourists may engage in other non-dark experiences and possess non-dark motives (Biran et al., 2011; Smith & Croy, 2005); for example, people visit as part of a leisure or self-education experience. More recently, Isaac and Cakmak (2014) empirically tested the motivations of visitors to the former transit camp of Westerbork, considered an 'iconic dark site in Netherlands' (Isaac and Cakmak, 2013, p.1), revealing the following as reasons for visitation: 'self-understanding', 'curiosity', 'conscience', 'to experience a 'must see place'' and 'exclusiveness' (Isaac and Cakmak, 2013, p.13). These are reasons that are totally divorced from an interest in or fascination with death, and the authors state that "motivations of tourists to 'dark' places are varied, and indeed 'dark' attractions are sites for various experiences, many of which are often devoid of dark aspects (Isaac and Cakmak, 2013, p.11).

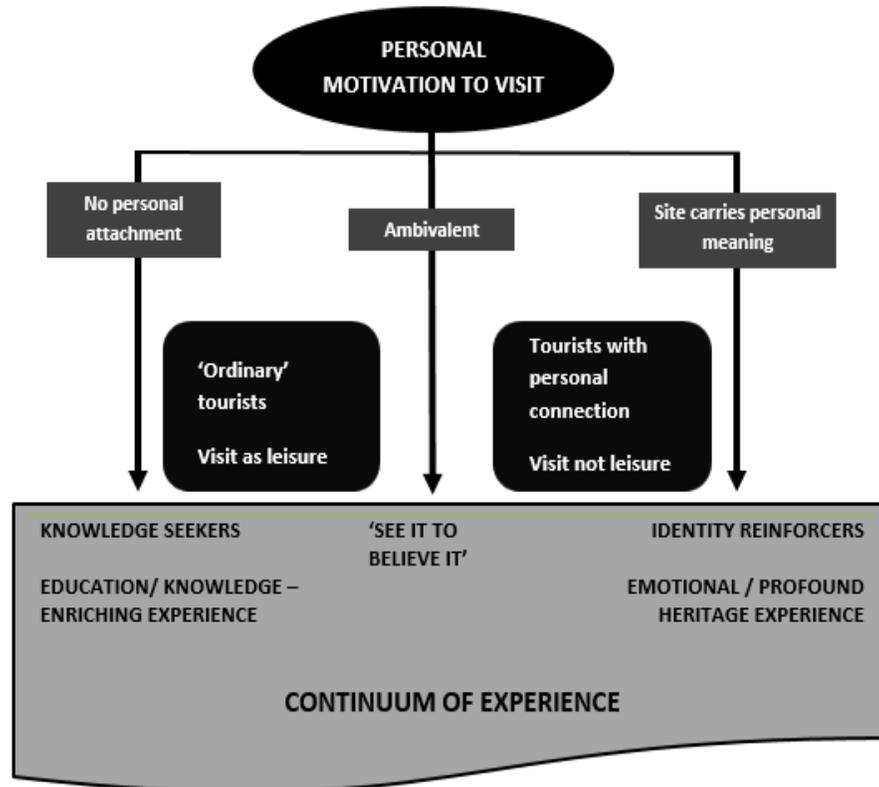
Memorial sites linked to the events of the Holocaust and the atrocities of Nazi Germany and National Socialism are in essence dark tourism sites; they are humanity's deathscapes, depicting death, genocide, and unimaginable human suffering caused by man against man. These sensitive heritage sites are also immensely popular, being visited by millions of people every year. The treatment of sites with dark attributes as heritage tourism sites highlights the key characteristics of such sites: (a) heterogeneity of visitors' sought experiences and (b) the experience at the site as an interactive process between the visitor and the site resources and management.

Considering the variety of symbolic meanings that tourists attach to dark heritage sites (which in turn is linked to the multi-functional character of these sites), Biran et al. (2011) propose an experiential framework focused on the visitors' motivation, their derived perceptions associated with the site and ultimately the benefits sought while on-

site. Biran et al.'s (2011) study found that visitors to dark heritage sites belong to three main categories, each with differing motivations and seeking different benefits.

The first category are visitors with personal connections to the site, for whom the site carries personal meaning, who perceive the site as personal heritage and tend to display great interest in a profound emotional experience and feeling connected to their own heritage (Biran et al., 2011, p.837). These visitors can be described as 'identity reinforcers' (Prentice & Anderson, 2007), for whom the visit is *not* seen as leisure (Biran et al., 2011, p.837). The second category are visitors/tourists, or 'ordinary tourists' (Muzaini, Teo & Yeoh, 2007, p.29), who do not have any personal attachment or connection to the site, and who regard the visit as leisure. These visitors are primarily seeking education and knowledge. The third category includes the 'ambivalent' visitors (Biran et al., 2011), displaying some similar characteristics as the second category, often visiting the site to 'see it to believe it'. These three categories of visitors are relevant to dark heritage sites, and point to the key characteristics of sensitive heritage experiences: their heterogeneity (linked to different audiences, their differing motivations, perceptions and sought benefits) and their interactive nature (born from the interactive process between visitor and site's own attributes and resources linked to the history on display).

Cognisant of the heterogeneous nature of sensitive heritage tourism experiences, highly dependent on visitor motivations and the interactive processes between visitors and site's own attributes and resources, and recognising the need for a balanced integration of cognition and emotion, Figure 1 proposes a potential continuum of experience at sensitive heritage tourism sites, as the first part of the conceptual model within this study.



**Figure 1 - Continuum of experience at sensitive heritage sites**

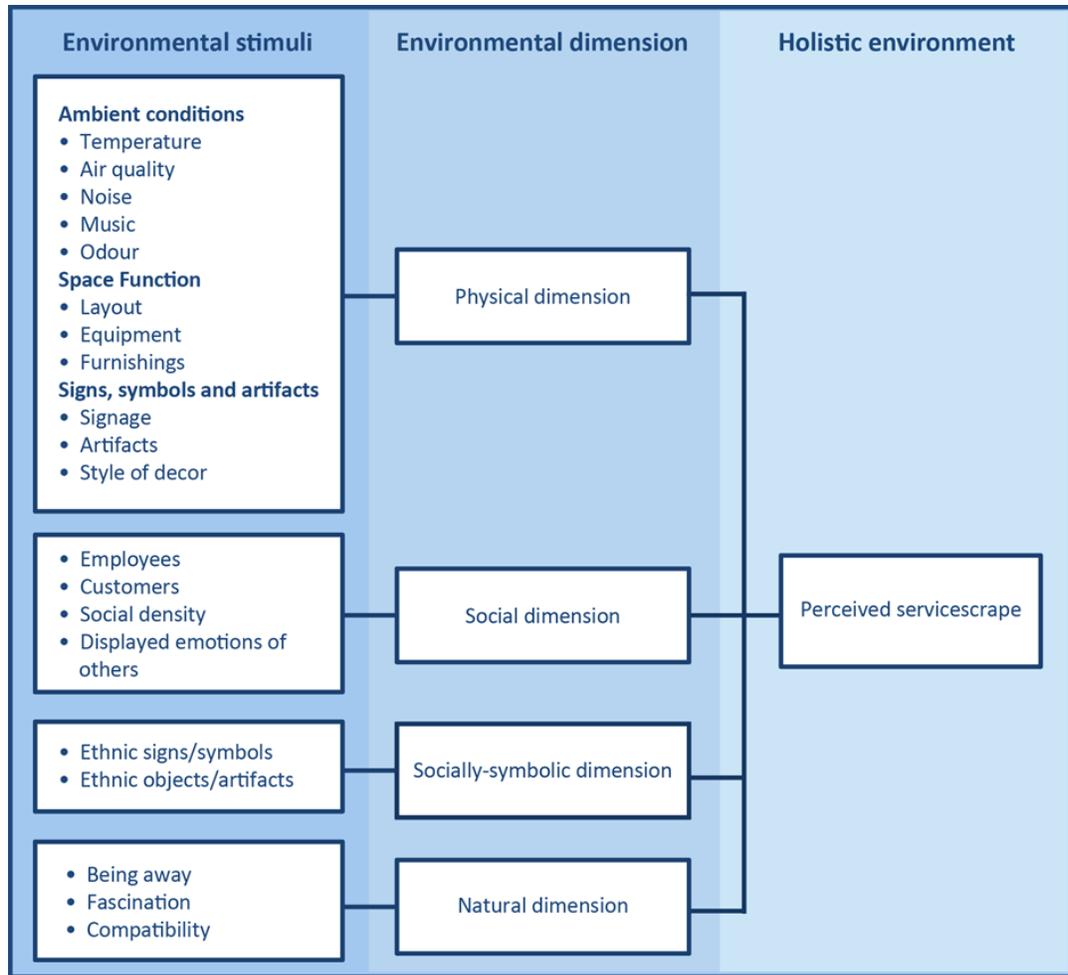
## MANAGING THE VISITOR EXPERIENCE FROM A SERVICES MANAGEMENT PERSPECTIVE

Ultimately, visitors at memorial sites and museums seek to make sense of the historical heritage encountered, by making use of the material substance presented, the events and people associated with it. However, this material substance, whether authentic or not, can only speak if it is comprehensible to a public that does not have the expertise or direct historical experience (Knigge, 2010). The view that a site's historical remnants do not speak for themselves but must be made legible through explanatory labelling and most often through historical exhibitions, is widely accepted by academics and industry practitioners in this field (Perz, 2013). The communication and interpretation of historical remnants, events and people in the roles that they had requires a diverse and increasingly sophisticated repertoire of methods and techniques such as encouraging visitors to engage in activities that involve encountering the physical, man-made (and natural) surroundings and artefacts, site employees and other visitors.

Bitner (1992) introduced the servicescape framework to contribute to the understanding of the role of the physical environment in a service setting. This recognizes the importance of the environment upon behaviours (Booms & Bitner, 1982; Shostack, 1977; Zeithaml, Parasuraman & Berry, 1985). Within a consumption setting or servicescape the physical elements can cause internal cognitive, emotional, and

physiological responses in both customers and employees. These responses influence a customer's and employee's desire to approach or to avoid a particular setting (Mari & Poggesi, 2013). Conceptualising the heritage site as a servicescape where visitors seek to understand and interpret past events is a useful means of encapsulating the total experience and illustrating the managerial implications of delivering such a continuum of experience.

Responding to Bitner's (1992) call to move beyond a consumption setting's physical dimension and to consider the less tangible dimensions present within a consumption setting, Rosenbaum and Massiah (2011) conceptualized an expanded servicescape framework that adopts a multi-disciplinary approach and consider the consumption setting holistically. Rosenbaum and Massiah's (2011) expanded servicescape framework comprises four environmental dimensions: physical, social, socially symbolic and natural and is depicted in Figure 1. These four categories of stimuli may enhance or constrain employee and customer approach/avoidance decisions and social interaction behaviours. The expanded model treats the servicescape holistically, comprising of not only the setting's physical, built and manufactured dimension already scrutinised by Bitner (1992), but also of the social (i.e. human), socially symbolic and natural dimensions that together "act in unison to influence customer behaviour" (Rosenbaum & Massiah, 2011, p.481).



Source: Rosenbaum and Massiah (2011, p.473)

Figure 2 – Expanded servicescape ( Rosenbaum and Massiah, 2011, p.473)

While recognising the fundamental relevance of the physical and natural aspects of a site, the combination of the social and socially symbolic dimensions are of crucial importance to the management of dark heritage tourism sites.

*The physical dimension* - The physical dimension principally involves the tangible, easily seen, observable (Ardley, Taylor, McLintock, Martin & Leonard, 2012). Heritage sites can be distinctive in terms of their design so space and functionality are important. The authentic, original structures and artefacts (such as remnants of buildings, grounds, collections, archives, exhibitions, fences, access routes/ roads/ railways, equipment) can be differentiated from those that have been scientifically and sympathetically reconstructed to accurately reflect the original.

*The natural dimension* - The natural setting, the geographical and topographical location of each site are essential for the assessment of the authenticity of the site and its history. The rationale for the inception of a site was often dictated by the geographical position and the proximity to natural resources or other points of economic interest (Geyer, Franke & Koch, 2010). The natural vegetation was and continues to be of

significant importance to sites of death and genocide, as often trees and woodland areas provided the camouflage under which crimes took place.

*The social dimension* – incorporates the entire complex humanistic dimension unique to dark heritage sites linked to crimes of death, genocide, suffering and tragedy. As stated by Proshansky (1978, p.150) “there is no physical setting that is not also a social, cultural, and psychological setting”. Basing their social dimension on previous research (Rosenbaum & Montoya, 2007), Rosenbaum and Massiah (2011) conceptualized the social dimension as being comprised of: consumers, employees, along with their density in the setting and their expressed emotions.

*The socially symbolic dimension* - Understanding the servicescape of dark heritage sites and how the various site’s own attributes, history and connections with different social and ethnic groups manifest themselves as a source of meaning(s), is important for the heritage site servicescape. The potential for dissonant heritage (Tunbridge & Ashworth, 1996) at sites of death, genocide and human suffering relates to how the past, its conserved artefacts and remembered personalities, symbols and associations are related to specific social and ethnic groups and how such connections between the site’s evidence and these groups provide specific meaning(s).

By integrating the two previously identified frameworks that had emerged from the review of the dark/sensitive heritage tourism and services marketing literature(s), the proposed conceptual model for this study is illustrated below, in Figure 3. The model captures the two fields of enquiry linked to the management perspective: the planned experiences to be offered at sensitive heritage sites, and the key elements of the expanded servicescape that imbue the delivery of these experiences. The model seeks to place under interrogation the key expanded servicescape dimensions and their comprising elements that can contribute to the delivery of a holistic visitor experience, and asks how are these being managed currently?

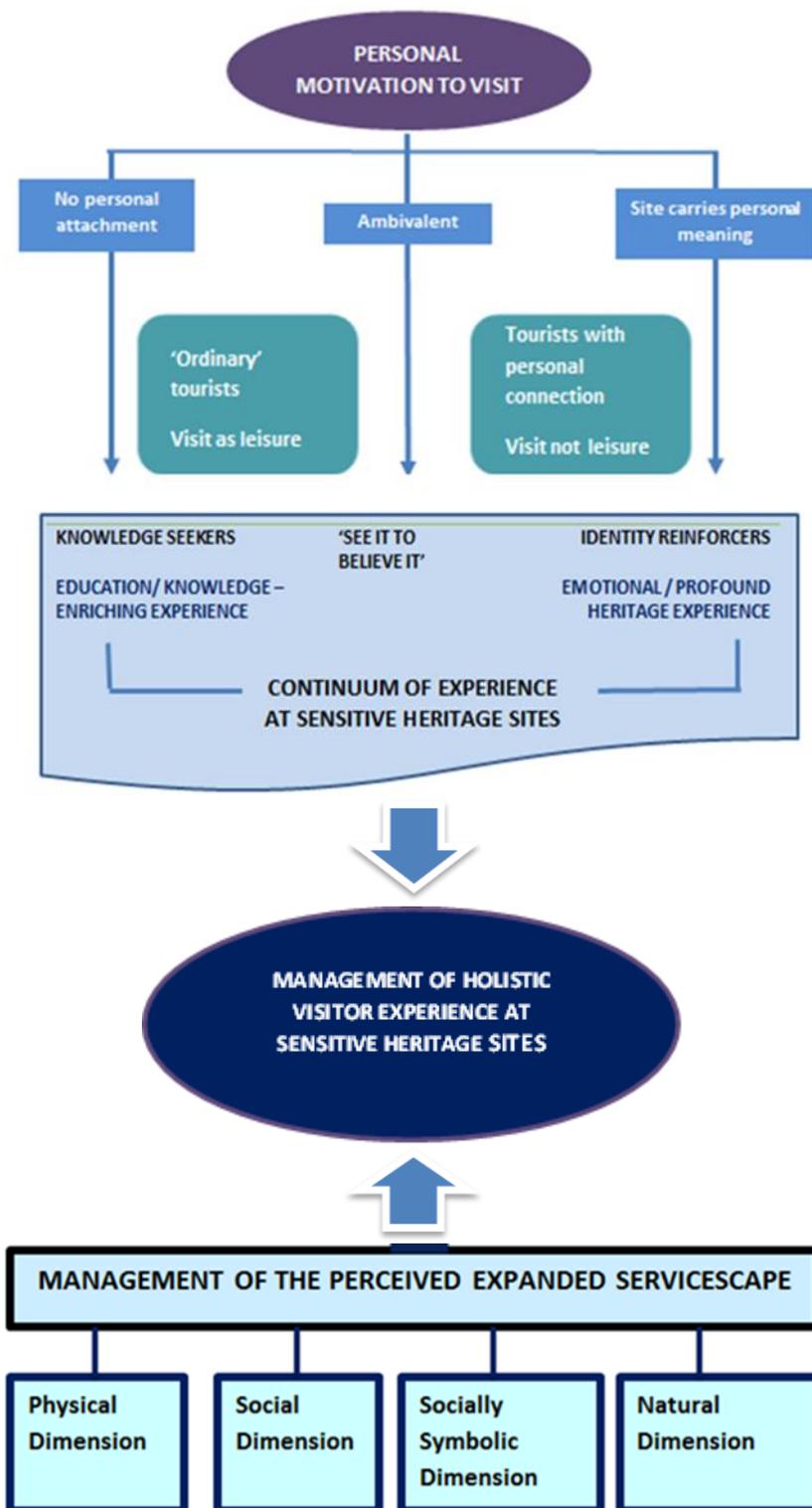


Figure 3 – Management of holistic visitor experience at sensitive heritage tourist sites

Thus, Rosenbaum and Massiah’s (2011) expanded servicescape model illustrating the physical, natural, social and socially symbolic servicescape dimensions provided the

framework for the empirical research. The purpose of this study was to investigate the site managers' perspectives of the visitor experience at memorial sites and museums and to identify the challenges of providing an integrated sensitive heritage servicescape so that visitors can benefit holistically, from the overall experience.

## METHODOLOGY

An in-depth, multiple case-based method based on an interpretive approach (Carson, Gilmore, Perry & Kronhaug, 2001; Patton, 2002) was used. Case study methodology allows the questions what, why and how to be answered with a relatively full understanding of the nature and complexity of the complete phenomenon, and it lends itself to early, exploratory investigations in which the variables are still unknown and the phenomenon not yet fully understood (Meredith, 1998). Prior research within the field of servicescape design has advocated interpretive research for understanding the holistic servicescape environment (Rosenbaum & Massiah, 2011).

This study included four cases representing dark heritage sites: Mauthausen Memorial in Austria; Dachau Memorial in Germany; Auschwitz- Birkenau Memorial and State Museum in Poland; Sachsenhausen Memorial and Museum in Germany. These four sites share the following characteristics:

- Are linked to the distant dark events connected to Nazi Germany's system of terror and death, the Holocaust and National Socialism's atrocities.
- Are located in either victim or perpetrator countries, thus allowing for the investigation of the different and differing evolving memorial site narratives (especially with reference to perpetrator countries, such as Germany and Austria) vis-a-vis visitor's cognitive and emotional experiences.
- Are considered dynamic servicescapes, undergoing continuing developments, especially in terms of their provision for learning, education and communication roles.
- The young generation is the primary target market: young people (generally aged 14 +) whose formal education includes an element of curriculum focused WWII and Germany's role in it, including National Socialism, Nazi Germany and the Holocaust.
- Recent changes in visitation pattern report that approximately 80% of all visitors are non-Jewish.

Targeting the challenge faced by site management to effectively engage with visitors who have no strong personal ties with the site, the empirical research sought to investigate the physical, natural, social and socially symbolic dimensions at each site. Data collection was guided by Rosenbaum and Massiah's (2011) model depicted in Figure 2. It included observation studies of the servicescape dimensions at each heritage site, analysis of documentary material (reports, brochures, websites) and in-depth interviews with key site managers, representatives and other site staff (heads of education, interpretation and research related work and guides). Observations of the physical and natural dimensions of each site were recorded using written descriptions,

and documentary evidence such as printed materials, reports and on-line information from each site were analysed in relation to the four servicescape dimensions.

In-depth interviews were carried out on site with managers and site representatives. The in-depth interviews were guided by a research protocol based on the key themes from the heritage site servicescape dimensions. The focus was on generating richness, diversity, depth and creative insight, therefore the discussions were dictated in pace and nature by the respondent. In-depth interviews lasted from 2-4 hours and followed a semi-structured format, while adopting a flexible approach during the interview to allow for elaboration on key themes. Interviews were recorded, transcribed and analysed regarding the servicescape components.

## FINDINGS: PHYSICAL AND NATURAL DIMENSIONS OF SITE SERVICESCAPE

Findings relating to the physical and natural dimensions include the authenticity of the site and the artefacts.

*Authentic physical and natural environment* - All site managers recognise that sites have a number of roles. They are memorial sites, they commemorate the dead and suffering, they are sites of mourning over painful events and need to provide some understanding regarding how they evolved. They are also established places of learning, where the public are invited to view the historical evidence and visit explanatory exhibitions in order to decipher the past events. Observation and analysis of documentary materials for each of the sites indicated that they encompass expansive areas of land which provide the physical and natural servicescape that underpins the entire visitor experience. Site managers indicated that attention to the physical and natural servicescape was often their prime focus. The main struggle was to maintain the site and its authenticity as without the site there would be no museum.

*'This is what people come to see. The main functions of this site are to preserve its physical structures, the remnants of the site, to research and to educate' (Auschwitz – Birkenau Memorial).*

At Sachsenhausen it is recognised that: *'the original buildings and structural remains of the concentration camp are 'guarantors of the memory'. Therefore their preservation and conservation are of utmost priority'.*

The natural environment is also very important at these sites as many areas are mass graves containing human ash. These are located in various places within sites that visitors have access to today.

*Artefacts* - The importance of artefacts as part of the material evidence at sites was perceived to be integral to the authenticity of the physical and natural environment. For example, the buildings and site remnants *'testify'* to the tragic history of Auschwitz and *'make it possible to touch and experience Auschwitz directly to this day'* (Director,

Auschwitz – Birkenau Memorial).

## FINDINGS: SOCIAL AND SOCIALLY SYMBOLIC DIMENSIONS OF SITE SERVICESCAPE

Findings relating to the social and socially symbolic dimensions include the sensitive nature of the heritage sites and the importance of interpretation.

There is growing recognition from site management of the importance of interpreting the wider servicescape dimensions for visitors and that there are some larger issues to be explained. For example, the sites need more interpretation and explanation in terms of the historical, social, political and economic context of their existence. This has led to site managers needing to focus more on the social and socially symbolic dimensions of site management. In more recent times, with the passing of many survivors, revisionist tendencies and other unsettling world events as well as the ever increasing number of new generation visitors, site managers have become more aware of the need to address the social and socially symbolic aspects for visitors.

Originally during the immediate post-war period the main functions of the sites were closely aligned to the needs of the survivors and their families, to mark and secure these sites as ‘witnesses’ to the atrocities committed and to warn future generations against similar events. Today the importance of communicating and informing the public about the historical events and presenting them with a contemporary perspective has become more pertinent. In-depth interviews with managers revealed that the social and socially symbolic aspects of the servicescape needed more attention as the new generation of visitors were further removed in time from the events. Thus site managers indicated that there are a range of issues and perspectives that need to be explained to visitors. Some issues are of a purely historical nature (for example, what were concentration camps) and other issues are of both a historical and moral nature (for example, the racist ideology leading to mass murder of civilians and prisoners of war).

*Sensitive heritage, not dark tourism* – Site managers indicated that the current dilemma for their sites was in ascertaining how best to draw meaning from the past for different groups, those with some personal connection to a site and those without and for a new generation of visitors. These managers did not agree with the term ‘dark’ heritage being used to describe their sites. Instead they want them to be recognised as sensitive places of heritage where people may visit to understand the past, reflect on and learn from it. They did not see their role in relation to dark events but rather to enlighten visitors and to help society learn from the past and reflect on deep social morals.

*Interpretation and use of site guides as educators or professional communicators*  
- Traditionally the majority of visitors were young people from the surrounding countries (Poland, Germany and Austria) but more recently there have been considerable changes regarding the geographical origins of visitors. Site managers have noted the changing nature of visitors to the sites, from people with emotional ties to those with no personal attachment. For example, there are many visitors from Asia, countries such as Japan and

South Korea, countries not directly affected by National Socialism and the Nazis.

Site managers (particularly at Mauthausen Memorial and Sachsenhausen Memorial) indicated that more explanation and open discussions with visitors are now taking place, addressing the deep, unsettling questions of how such sites could have existed within highly populated areas, as part of normal village/local life, as they had not been hidden from local people's view nor the atrocities committed took place in a hermetically closed space. All site managers recognised that this narrative had changed since the immediate post-war narrative which was accepting of the view often perpetuated by local people and communities situated in the vicinity of these sites: 'we didn't see' and 'didn't know' what happened. *"Both perpetrators and victims were recruited from society, and without society's interest and active support the concentration camp would not exist"* (Head of Education Services, Mauthausen).

At sites such as Mauthausen where the camp's perpetrators, the former SS (Schutzstaffel, translated as Protection Squadron or defence corp, built upon Nazi ideology 1929-1945) had an army camp outside the concentration camp wall also needs to be explained. Therefore at Mauthausen, tours not only focus on victims but on the whole context, the site, the perpetrators, the immediate surrounding geographical area and the surrounding population. Thus, there has been an expansion of the perception of the servicescape over time. To achieve this, sites try to relate to the changing needs of visitors in terms of their familiarity with the history and context of the sites, the need for interpretation, communication and education and the overall ethos of the site.

Similarly, at Sachsenhausen, visitors are presented with the full spectrum of perspectives: that of the victims', the perpetrators', collaborators' and bystanders'. Additionally, a 'truth booth' has been installed which was designed to capture visitors' thoughts and feelings while visiting the camp. It encourages visitors to leave a message, to *"consider not only what happened here, but also what happens to you when you are here"* (Truth Booth at Sachsenhausen card).

All four memorial sites offer tours for visitors, and aim to provide dynamic, interactive communication and education. Site managers recognise that without the discursive and negotiating act of interpreting meaning into history, the importance of events cannot be established. The efforts are geared towards delivering a sensitive heritage servicescape that facilitates personal meaning making and relevance to visitors' lives, here and now.

Table 1 below contains the main summary of findings.

**Table 1 – Summary of Findings**

Site	Servicescape dimension	Theme	Summary of evidence/ key findings
Auschwitz-Birkenau	Physical & natural dimensions	Authentic physical and natural environment	<p>“Auschwitz-Birkenau’s authenticity and its ability to tell the story of the Holocaust are unparalleled” (Auschwitz- Birkenau Memorial and State Museum website).</p> <p>“This site and its historical remains is what people come to see” (Press Officer).</p> <p>“...the natural environment is very important as mass graves and areas containing human ash are located in various places within the grounds that visitors have access to today; this makes the site beyond all its other functions, a cemetery, a resting place...” (Deputy Head of Preservation Department).</p>
		Artefacts	<p>“The museum’s exhibits are presented in the original buildings of the former concentration camp. It was in these same buildings that prisoners were housed. And it is the authenticity of this place that determines the character of the main exhibition...(European pack for visiting Auschwitz-Birkenau Memorial and Museum, 2010, p.145).</p> <p>“All this has the effect of evoking empathy with the victims (Site Guide)</p> <p>“... When they see the baby clothes and toddlers’ pushchairs, they tend to imagine their own families...(Head of Educational Projects).</p>
Auschwitz-Birkenau	Social and socially symbolic dimensions	Sensitive heritage – not dark tourism	<p>“The reason why we have not chosen to offer automated audio guides is that the story of Auschwitz cannot be delivered by a soulless machine; we cannot leave a machine to do it. The subject is too sensitive to entrust it to a machine...” (Press Officer).</p> <p>“This Museum is living testimony to the horrors of the Holocaust and is not considered by us to be a ‘dark tourism product’” (ICEAH, Visitor Services Representative).</p>
		Interpretation - site guides as educators	<p>“In our terms our site guides are educators; guides are simply guiding visitors round a site; our aim is to change site guides into educators. An educator recognises the</p>

			<p>learning needs of their group, prepare their lesson and then deliver it in a way that makes sense to the people in the group” (Head of Educational Projects).</p> <p>“There are no ‘fire works’ here, as the nature of the history here is about the site and its remains; we will always be servants of authenticity” (Press Officer).</p> <p>“Creating an emotional experience is not our goal. From an educational point of view emotion can be a barrier...” (Head of Guiding Methodology).</p>
<b>Mauthausen</b>	<b>Physical &amp; natural dimensions</b>	<b>Authentic physical and natural environment</b>	<p>“Often visitors of historical places want to feel the aura of originals...” (Administrative Director).</p> <p>“...around the walls, areas are facilitated which are now part of the memorial, this is now covering all of the historical area of the camp. The former soccer field and sick camp area, the stone quarry the northern part with the ash dump and the area of the former camp 3 in the east are nowadays part of the memorial” (Head of Education).</p> <p>“...the visitor is being encouraged, effectively, to take a look outside” (The Concentration Camp Mauthausen 1938-1945 Catalogue, 2013, p.299).</p> <p>“Today, the former concentration camp is a stone witness.” (Bulletin Mauthausen, 2013, p.7)</p>
		<b>Artefacts</b>	<p>“... the objects, photographs, documents, everything that visitors see belong to survivors of the camps or to the victims’ relatives...” (Head of Education).</p> <p>“These are singular objects whose full meaning can only be understood when they are placed in the context of the individual life history of which they were a part” (The Concentration Camp Mauthausen 1938-1945 Catalogue, 2013, p.300).</p>
<b>Mauthausen</b>	<b>Social and socially symbolic dimensions</b>	<b>Sensitive heritage – not dark tourism</b>	<p>“Memorials like Mauthausen are learning places: they serve reminding, the reflection, admonishing of and the discussion with the past” (Administrative Director).</p> <p>“... what is also important for a concentration camp memorial site of the 21st century is the question of how all those historic events relate to the present. .... who we are, why we are what we are and what all this might have to do with what happened 70 years ago. With the ever growing distance to the actual historic events, in my opinion,</p>

			<p>this should be in the focus of any educational efforts in the future” (Senior Curator, Mauthausen Memorial Archives, Federal Ministry of Interior).</p> <p>Mauthausen is clearly not a place of ‘dark tourism’... this memorial site is about providing a cognitive understanding of the world” (Senior Curator, Mauthausen Memorial Archives, Federal Ministry of Interior).</p>
		<b>Interpretation - site guides as professional communicators</b>	<p>“...we regard and train our guides as a professional pool of communicators; the objective is to offer training that ensures an effective communication process appropriate for the history of Mauthausen that goes beyond the mere narration of historical events and encourages reflection on the reaction to the experience by the individual and its relationship to their life” (Administrative Director).</p> <p>“The application of too much technology would interfere with visitor’s perception of the original events producing a barrier to the understanding of what happened here ...” (Head of Education).</p> <p>“Some technical solutions are used, but only when and if these solutions make sense concerning the contents and also educationally” (Administrative Director).</p> <p>“To emotionalize or to generate dismay are not our aims. Aiming to generate a highly intense emotional experience would be totally counterproductive” (Site Guide).</p> <p>“The information in some of our exhibitions is not just about historical facts; it is also about life experiences of those imprisoned here... for example prisoners’ constant state of ‘hunger’... (Head of Education).</p>
<b>Dachau</b>	<b>Physical &amp; natural dimensions</b>	<b>Authentic physical and natural environment</b>	<p>“This memorial site, like many other memorial sites, was founded for the relatives of the victims and for the survivors to have a tangible address where they can meet, where they can commemorate, because this place is a cemetery, an international cemetery, the only cemetery for a lot of people...” (Head of Education).</p> <p>“The renovation of 2006 made it possible for visitors to now enter the site through the original entrance, like the prisoners, first coming across the Jourhouse (SS</p>

			administrative building), situated above the camp gate. Visitors now follow the same route as the former inmates” (Site Guide).
		<b>Artefacts</b>	<p>“...the exhibits that are prisoners’ personal effects enable visitors to make an empathetic connection between this site, the victims of this work camp and their own life, now, in the present” (Head of Education).</p> <p>“The exhibition contains also the most important and vivid photos and documents that play a very important role in helping visitors understand the historical events and the actions of both victims and perpetrators” (Site Guide).</p>
<b>Dachau</b>	<b>Social and socially symbolic dimensions</b>	<b>Sensitive heritage – not dark tourism</b>	<p>“Our main aim is to trigger the visitor into asking him/herself: ‘what has this to do with me?’, thus building ‘an intimate connection’ between him/her and ‘this place’” (Head of Education).</p> <p>“Visitors should not leave this place with a total sense of certainty. It is almost better if they leave with a sense of upset and irritation, because learning about the actions of National Socialism is indeed deeply upsetting; .... it signifies a permanent danger, the negative potential of the human being and we should all be alert to its dangers” (Head of Education).</p> <p>“We don’t regard this site as a site of dark tourism” (Site Guide).</p>
		<b>Interpretation – focus on interactivity</b>	<p>“We want visitors to be active participants asking questions, like researchers; you can give them instructions for observation and analysis of the artefacts and ask for their answers, impressions, views” (Site Guide, Dachau).</p> <p>“Another thing is, especially in the guided tours, not to deliver lectures; our aim is to offer interactive tours, with the visitor involved from the very start.... people can identify with the individual biographies, they can see similarities between their own life and that of the prisoner, they can guess how sad and tragic it had been for that person..” (Head of Education).</p> <p>“...we must respect visitor’s autonomy as an autonomous learner, able to draw meaning from the evidence presented, with the aid of some interpretative content” (Site Guide).</p>

			<p>“If we adopted an unethical approach and didn’t respect the visitor’s autonomy, it can be seen as a soft form of injury. You can easily manipulate people with this horror...’ (Head of Education).</p>
<b>Sachsenhausen</b>	<b>Physical &amp; natural dimensions</b>	<b>Authentic physical and natural environment</b>	<p>“Most of the millions of visitors to concentration camp memorials come first and foremost to see the authentic historical site. They are interested in the relics and the traces left by the most terrible state crime of the twentieth century” (Sachsenhausen Concentration Camp, Events and Development, 1936-1945 Catalogue, p.10).</p> <p>“This is a complex site for the visitor, due to its multi-layered history...we must look after the infrastructure of the camp...The preservation and restoration of buildings and other physical structures is a key priority for us. Many of the original buildings and structures suffered either severe disrepair, almost ruin or complete demolition during the Soviet Special Camp era and the GDR period” (Head of Education) .</p>
		<b>Artefacts</b>	<p>Selected photographs of particular significance to the history of the concentration camp have been greatly enlarged and printed on gauze banners that stretch along the two longest walls of the room” (Sachsenhausen Concentration Camp, Events and Development, 1936-1945 Catalogue, p.13).</p> <p>“The many drawings done by prisoners on the outer walls and pillars of the prisoners’ kitchen, in the area where the vegetables were peeled...these are impressive and a valuable authentic feature. Great effort were made to preserve and protect these pictures” (Press Officer).</p>
<b>Sachsenhausen</b>	<b>Social and socially symbolic dimensions</b>	<b>Sensitive heritage – not dark tourism</b>	<p>“Sachsenhausen is a modern memorial and historic museum, with special humanitarian and educational task...” (Press Officer).</p> <p>“...it is also an international cemetery, perpetuating the memory of the victims; it functions as a publically accessible place of learning” (Press Officer).</p> <p>“We have a good level of contact with survivors, who are one of the sources of history and are seen as a part of the education function of the site...the number of survivors is</p>

			getting lower and lower... we try to incorporate second and third generations in the activity of the memorial, so that we maintain this very important link” (Head of Education).
		<b>Interpretation - focus on managing visitors’ limited receptiveness</b>	<p>“Our guides are the interface between the site and the visitors” (Press Officer).</p> <p>“We have a strong educational task and we are a publically accessible place of learning...” (Head of Education).</p> <p>We don’t intend nor try to trigger an emotional experience; we present the historical facts...however, the emotional perspective, you can say, is being captured by The Truth Box in Barrack 39, which is a new installation conceived and designed to capture visitors’ thoughts and feelings while visiting the camp. It’s a booth where visitors can go into, sit and reflect on what they have seen and learned, and leave some feedback if they wish to do so” (Press Officer).</p> <p>“By leaving a message, you consider not only what happened here, but also what happens to you when you are here” (The Truth Booth at Sachsenhausen card).</p> <p>"We do use technology on site: e-learning station for example in the Prisoner Kitchen, the sound system used for the audio testimonies of survivors, the Truth Booth is another example of technology. A new App is also being developed..." (Press Officer).</p>

## CONCLUSION

This study applied the adapted servicescape framework to four ‘dark tourism’ heritage sites. The authenticity and maintenance of the physical and natural dimensions of the site continue to be fundamental to its purpose and existence. However, with the passing of time, the social and socially symbolic dimensions are growing in importance and complexity, especially with the passing of survivors and the fading of the historical events pertaining to these sites out of living memory. Understanding the multi-layered socially symbolic dimension is most important in facilitating site managers to effectively craft a sensitive heritage servicescape able to reach and relate to a new generation of visitors, for whom the distant historical events requires deciphering and relevance to their present life and own society.

Thus, sites not only need to present an accurate historical narrative but also they need to address profound moral questions. For example why the events occurred in the first place, and how the torture and murder of humans could occur in the midst of civilian society. Considerable effort is now invested in how to best address the historical and moral nexus on each site. At all four sites the managers responsible for communication and education indicated that they are seeking new ways to deal with the challenges of managing the entire visitor experience holistically. In the past, site managers have focused primarily on preserving physical and natural structures and the remnants of sites. While this continues to remain the over-arching challenge of all four memorial sites, their managers, in full awareness of the growing scepticism and different perspectives regarding past events, are recognising the need to adopt the role of facilitator for socially symbolic communication and engagement.

The key issues identified from this study are that in order to manage effective sensitive heritage servicescapes, managers need to recognise that: the different perspectives of visitors are important, whether they have personal attachment or not, and that sensitive heritage servicescapes need to integrate the authentic (physical and natural) elements of the site in tandem with the social and socially symbolic dimensions that facilitate visitor engagement. It is the socially symbolic dimension of the servicescape that contemporary managers need to ensure its imbuing of the physical, natural and social sensitive heritage servicescape components.

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# THE IMPACT OF TOURISM ON A LOCAL COMMUNITY: A CASE STUDY OF NGORONGORO CONSERVATION AREA, TANZANIA

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## ABSTRACT

*Tanzanian's tourism industry is growing at an annual rate of 5% and contributes 17% to GDP. Tanzanian tourism is based on Safari tourism which requires not only programs for the conservation and preservation of flora, fauna, the environment and indigenous culture but also for job creation for the indigenous Maasai. Ngorongoro Conservation Area (NCA) is a multiuse conservation area which aims to conserve and preserve wildlife for tourism but contains a population of almost 70,000 local Maasai who need to earn a living. This paper, based on two surveys, examines whether tourism revenue directed to the Maasai pastoralist communities has an impact on their economic development, how much does it complement other income sources and the attitudes of the Maasai towards tourism and tourists. Most Maasai view tourism as a potential aid in the economic and educational development for themselves, their family and their community, and support its development.*

Key Words: ecotourism, Maasai, economic development, indigenous population

## INTRODUCTION

Safari tourism via the establishment of National Parks which combines wildlife conservation and preservation with tourism has been recommended as a means of economic development for many countries in sub-Saharan Africa (SSA), especially for rural, economically depressed areas (Runyoro and Vedeld, 1996; Goodwin, 2003; Mbaiwa, 2004; Hulme and Murphee, 2006; Foan et al., 2008). To date the model that has been used for wildlife conservation in most SSA parks is the Fortress Park model of having a park isolated and protected from any human impact. This was usually achieved by removing the indigenous population originally living within the park area and settling them outside the park while reserving the park only for the conservation and preservation of the indigenous flora and fauna and for use by tourists. Using the Fortress Park strategy, wildlife and tourists are winners but the indigenous populations who had lived in the parks are losers (Hulme and Murphee, 2001) as this model forbids the local population

from using anything in the park; i.e. the local population could no longer hunt, use the land for cultivation, collect firewood, graze their herds, use water sources, collect medicinal plants or any other use of flora, fauna or land.

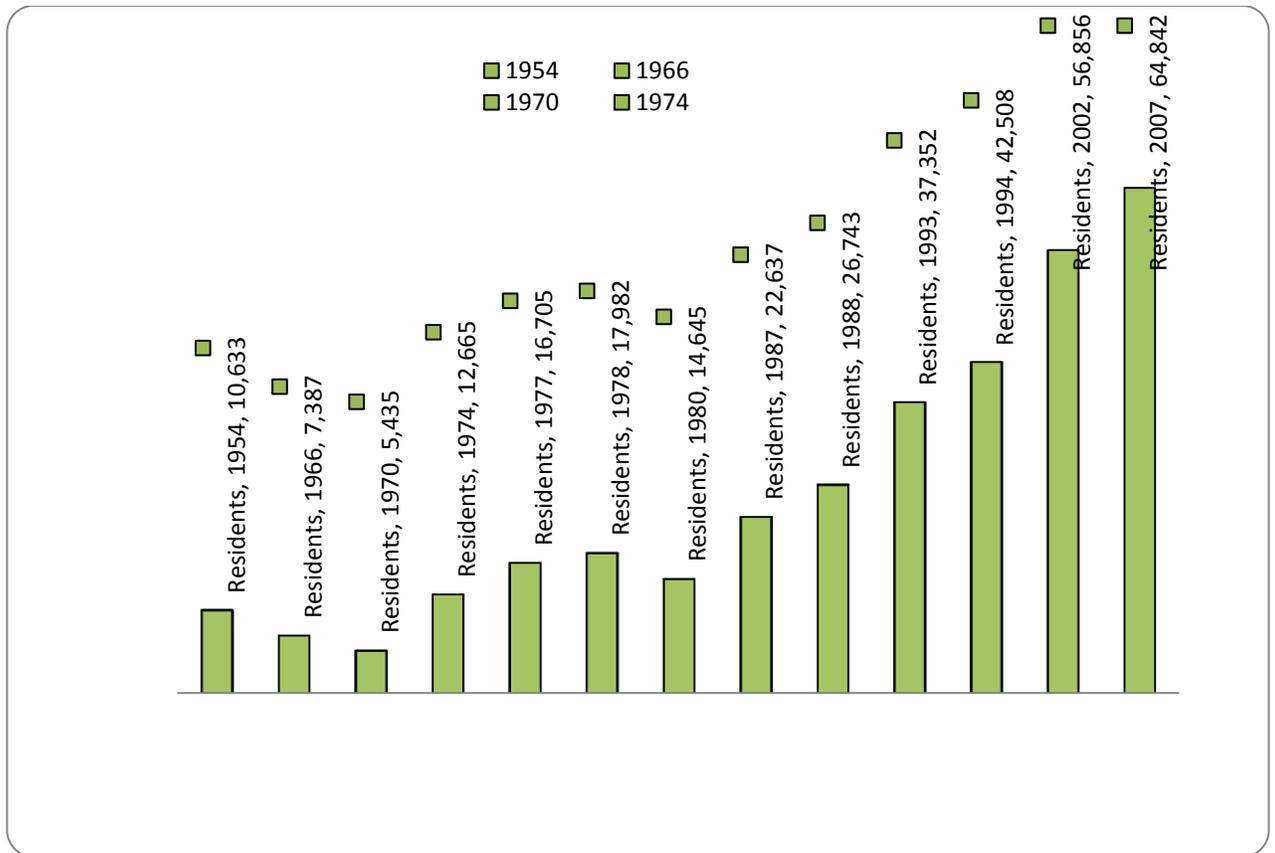
Ngorongoro Conservation Area (NCA) was established in 1959 using an alternative strategy for a conservation area by combining the goal of conservation, as in a Fortress Park, but with the indigenous population being allowed to continue to live in the conservation area but under land use restrictions; i.e. the NCA was established as a multipurpose land use area in which wildlife and people would coexist to the benefit of both. This model was later incorporated into the Community Conservation model as an alternative to the Fortress Park. The NCA's population, almost all members of the pastoralist Maasai ethnic group, was allowed to live only in recognized villages and maintain their herds of cattle, goats, sheep and donkeys but was not allowed to cultivate crops or receive land tenure. Land tenure and all decisions related to land use, conservation and resource utilization is the legal responsibility of the Ngorongoro Conservation Area Authority (NCAA) which was created to govern and run the NCA (Nelson, 2004; Charnley, 2005; Honey, 2008; McCabe et al., 2010). Since 1959 the Maasai population has increased from 8,000 to almost 70,000 today (Fig.1).

The NCA is one of the premier wildlife conservation areas in East Africa and attracts between 250-300,000 foreign tourists annually (Fig. 2). In 1979 UNESCO designated the NCA a "World Heritage Site" and in 2010 a "Cultural World Heritage Site" due to its dual land use policy. The NCA is 8,292 sq. km. (MNRT and NCAA, 1996) and has a mammal wildlife population, depending on the season, ranging from tens of thousands to over a million. These include large herds of wildebeest, zebra, several species of gazelles and antelopes, giraffes, elephants, buffalo, rhinos, leopards, lions, cheetah, hippos and other large mammals, birds and reptile species. The "Jewel in the Crown", and the reason for most tourists visiting the NCA, is the Ngorongoro Crater which has a stable population of 15,000-25,000 large mammals.

The Maasai in the NCA have successfully shared this land with wildlife for several hundred years. Nevertheless, they have been forced to live with the economic and development limitations that the tourism oriented conservation policy for the NCA's designation as a multiple land use area for wildlife, people and their livestock (Kijazi, 1997). This has led to stunted economic development and economic growth for the local population and a major concern for the community's future. The decline of livestock production per person (the primary economic activity of the community) combined with a major increase of the population encouraged some locals to start small-scale businesses; however due to the NCA's remoteness and limited infrastructure, there were limitations to the size and number of such businesses that can be supported in the NCA and many men are forced to migrate to other areas of Tanzania to earn a living. Hence tourism was suggested as an alternative for both community and individual wealth creation. To date, potential tourism activities include working in the Cultural Bomas (cultural centers which show traditional Maasai life), selling handcraft, hiring of donkeys and providing local guides for walking safari, picture taking of individuals in traditional clothing and fees for traditional dancing.

It is still unknown how many local people actually work directly or indirectly in tourism in the NCA, what do they do and how much does tourism contribute to family and community welfare and income and what are the expectations of tourism and tourists. This paper examines these questions using two sets of interviews. The first, conducted in 2006, was a written survey given 120 local Maasai and 40 people who work for the NCAA or the locally elected pastoral council (PC) which advises the NCAA. The main objective of this study is to assess the impact of tourism revenue directed to the Maasai pastoralist community and to determine how this income source complemented other income generation sources. The second, conducted in 2010, was based on an open-ended interview model in which verbal questions were asked and the interviewees could answer the question any way and as long as they wanted was given to 28 local Maasai two years after the first survey. The specific objectives are:

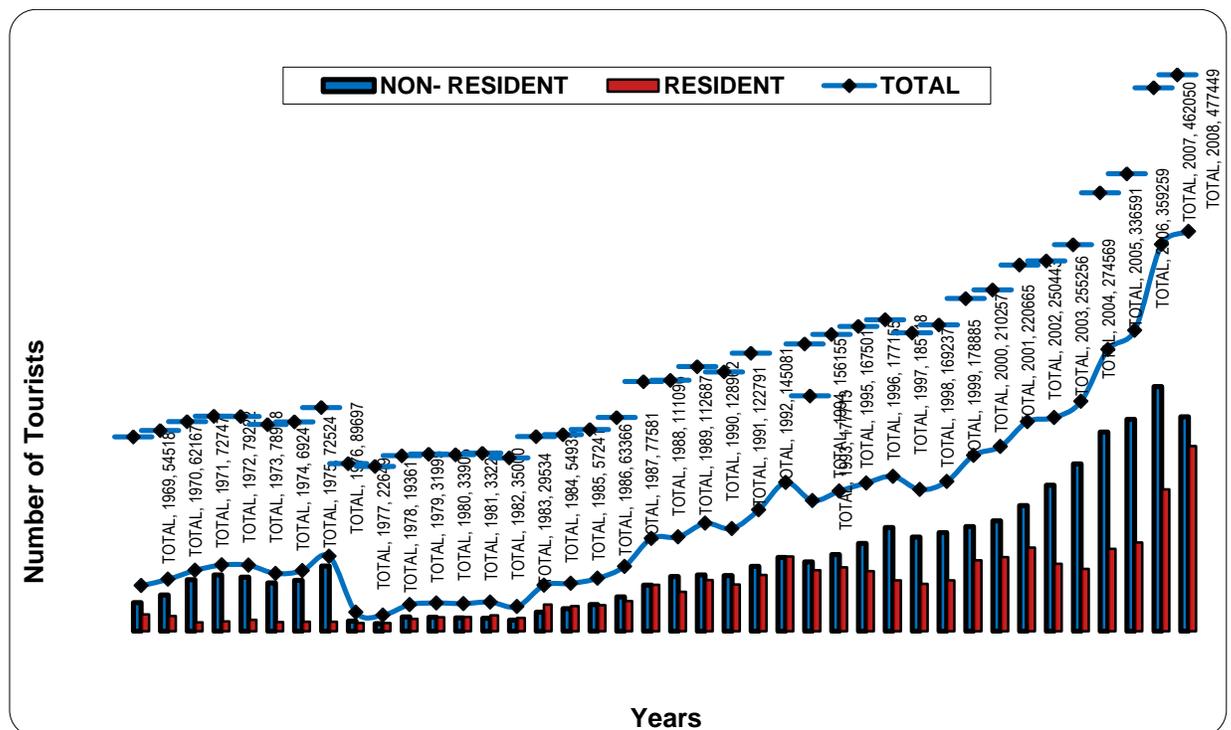
1. To assess whether tourism revenue directed to the Maasai pastoralist communities has an impact on their economic development;
2. To assess whether communities tourism activities' compliment livestock economy and other livelihood economy of the Maasai communities in Ngorongoro;
3. That attitudes of and hopes that tourism may provide the local Maasai.



*Source:* NCAA census, 2007

Figure 1: POPULATION TRENDS IN THE NGORONGORO CONSERVATION AREA

The Ngorongoro community pastoralists have historically depended on livestock keeping as the bases of their economy. In the 1980's when the human population was 30,000, the number of heads per person was 12:1 for cattle and 18:1 for small stocks (goats and sheep). The number of livestock started declining in the early 1990's due to a combination of severe drought and diseases associated with the interaction between wildlife and livestock in the area; livestock per head decreased to 2:1 for cattle and 6:1 for small stocks. The government of Tanzania in 1992 deliberately allowed small-scale cultivation to economically support the population but when cultivation interfered with core wildlife conservation areas, cultivation was stopped. The declining of the livestock economy has negatively affected the economic well-being of many local families. Due to this and other economic and agricultural limitations imposed on the local Maasai, the NCAA has a program to help subsidize food prices and school fees and scholarships for High School and even University students.



Source: NCAA Statistics Office, 2009

Figure 2. Tourism flow in the Ngorongoro Conservation Area from 1969- 2008

The NCAA makes most of its income from tourists entry fees, camping fees, concession fees, vehicle entry fees, resident entry fees, filming fees, aircraft landing fees, walking safari fees, fines and compensation fees, and sales of goods and services; i.e. from tourists. In 2008/09 entry fees contributed 72% of the Tshs 34 billion (USD 29.31

million) of tourism income for the NCAA. Between 1997 and 2008 the number of foreign tourists increased by 61% and has held more or less steady (Figure 2) and their entrance reached over \$23M dollars by 2008 of which \$1.5M was budgeted for community development.

## METHODOLOGY

This paper combines the results of two surveys on the NCA's Maasai. While the surveys were conducted for different reasons, had different protocols and asked different questions, their results are interesting as they partially represent the change over time that the Maasai have towards tourism.

Survey #1 - In this survey, conducted in 1996, we were interested in understanding how the NCA's indigenous Maasai population as well as the staff of the NCAA (Ngorongoro Conservation Area Authority, the governing authority within the NCA) and the PC (Pastoral Council, an elected body of NCA's population which works with the NCAA) perceives tourism development and how tourism has affected the economy of the local community and population. A separate questionnaire was developed for interviewing the local population and for the NCAA and PC staff; while some questions were used in both, others were specific for a group. The questionnaires consisted of questions on socio-demographics, income sources and perception of the NCAA and tourists.

Research assistants (local Maasai) were chosen and trained to do the survey. Data collection was concentrated in three Wards of the NCA (Ngorongoro, Nainokanoka and Olbalbal). In each Ward, 40 written interviews were administered, giving a total of 120 interviewees from the communities and plus 40 from the NCAA and PC staff. Samples from each Ward were selected from the 2007 census and run through Microsoft Excel 2007- Pop Tools 3.06 for random sampling. The NCAA and PC staff were randomly chosen from employee lists. Most interviews took about 30 minutes. The questionnaires were prepared in English and translated into Maa, the Maasai language, for interviewing. The responses were then translated into English for analysis.

Data was entered into the SPSS 16.0 template and the data analysed using the MS Excel statistical program. The data was coded and assigned numerical values and entered into SPSS 16.0, and then cleaned. Descriptive statistics were run for all questions to generate statistical information using independent and grouped variables. Aggregate analysis was done to all data from the three wards, and disaggregated for each ward (Olbalbal, Ngorongoro and Nainokanoka). The relationships through cross tabs were disaggregated for wards. Aggregate analyses were done to all data from NCAA and PC staffs' questionnaires and thereafter disaggregated by sex. From the SPSS data editor, descriptive statistics analyses were run and frequency tables were formulated from the questionnaires to generate statistical information. Chi-square test was run for the variables that required comparisons, e.g. male and female respondents and wards, where data was collected. Data are presented in pie, cylinder and 3-D Column charts for

interpretation whereby percentage labels from different response were expressed on the charts.

Some of the responses were run through the SPSS one ways ANOVA by comparing  $n$  random samples to measure the interaction of tourism activities and other communities' economic activities. A table of information available from the interview was prepared by using an interview guide and given annotations related to questionnaire codes. This semi-structured interview information used to complement the questionnaire data information in discussion section.

Survey #2 – this survey, conducted in 2010, examined the attitudes and desires of the local Maasai in respect to future tourism development. This project was conducted by Dr. Sheryl Mendlinger and Mr. Asantael Melita. Dr. Mendlinger, together with Mr. Sindato who acted as translator when needed, interviewed 28 local Maasai from four villages and three Cultural Bomas, four people, two males and two females, from each village/Boma. The questions asked included socio-demographic data, culture, day-to-day life, attitudes about tourism and tourists, possibilities in future tourism development and about the Cultural Bomas (Table X). The survey was written in English. In 26 interviews Mr. Sindato verbally translated the interview questions into Maa and afterwards translated and transcribed the answers into English. Two interviews were conducted in English. All interviews were taped and English notes taken during the interview. The interviews took between 30-90 minutes each. Qualitative and quantitative statistical analysis was performed on the data. This paper reports on preliminary results that are directly related to tourism development.

## RESULTS

### *Survey 1*

A total of 119 interviewees over the three wards in the NCA was used (due to technical problems one interview was not included). Of the 119 community members 73 (61%) responded that they are not involved in tourism operations in their ward and 46 (39%) said they were as compared to 33 (83%) and 7 (17%) of the NCAA/PC staffs. However, there was significant difference among the three wards ( $\chi^2=7.75$ ,  $df=1$ ,  $p<0.05$ ) when responding to how they are involved in tourism. Among the activities of the community members, guiding tourists and working in traditional Cultural Bomas exhibitions can be defined as direct involvement in tourism activities as they interact with tourists. Other activities include friendship home stays, donations and visits to woman groups, member of tourism committees, conservation and security (Fig. 3).

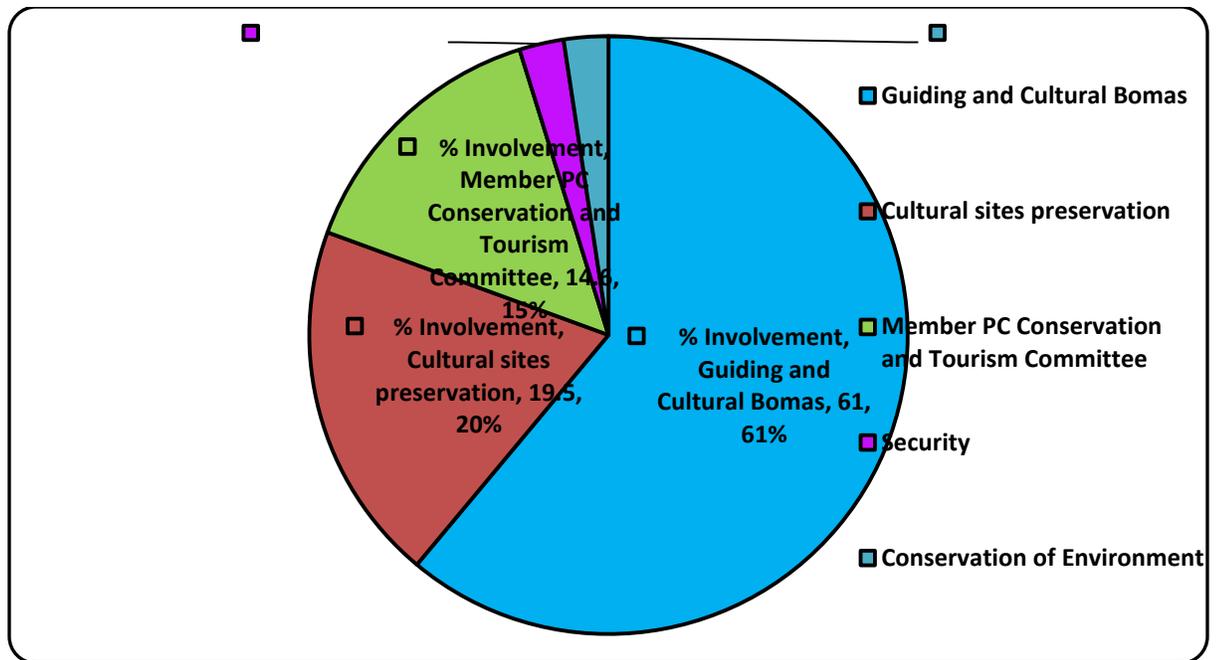


Figure 3. Breakdown of the community members involved in tourism activities in the NCA

Livestock is the primary economic activities of the people living Ngorongoro. In our survey 102 people (86%) responded that livestock was their primary economic activity, 10 (8%) said small scale business activities and 4 (3%) said cultivation, which is illegal within the NCA. Tourism was considered to be either an alternative or complementing existing community economy activities by 101(85%) respondents. Thirty of the NCAA/PC workers ranked tourism as an alternative economic activity.

There was significant significance difference in responses between male and female respondents among wards ( $\chi^2=156.069$ ,  $df=2$ ,  $p<0.005$ ) and NCAA/PC ( $\chi^2=29.432$ ,  $df=1$ ,  $p<0.005$ ). In total 105(90.5%) community's respondents said that livestock keeping is highly prioritised activity in NCA, whereby only 46 (44.2%) considered tourism as a high prioritised activity followed by 35(37.6%) for small scale business and 3 (3%) for cultivation. Interestingly the community sees tourism employment as only benefiting those with a good education in their society and as such is a stimulus for young people continuing their education. Communities are very aware that cultivation is not compatible with conservation of natural resources, and that they engaged in it just to survive during a high decline of their primary livestock economy.

Economic activities in the NCA needs to have a high degree of reliability for the Maasai communities, especially when changes in life style, declining herd size and unstable weather are predicted in the society's day to day life. In Ngorongoro, 57 respondents from the communities stated that tourism is a reliable activity as compared to 35 for small businesses, 21 for other employment opportunities and three for other

activities (Fig. 4). Twenty four NCAA/PC interviewees responded that tourism is a more reliable activity compared to six for small scale businesses and ten to employment opportunities (Fig. 4). In addition the community members said that tourism has little negative impact on natural resources compared to small scale business and cultivation. There was significant difference between men and women ( $\chi^2=29.432$ ,  $df=1$ ,  $p<0.005$ , men higher) community and NCAA/PC ( $\chi^2=59.895$ ,  $df= 1$ ,  $p < 0.005$ ).

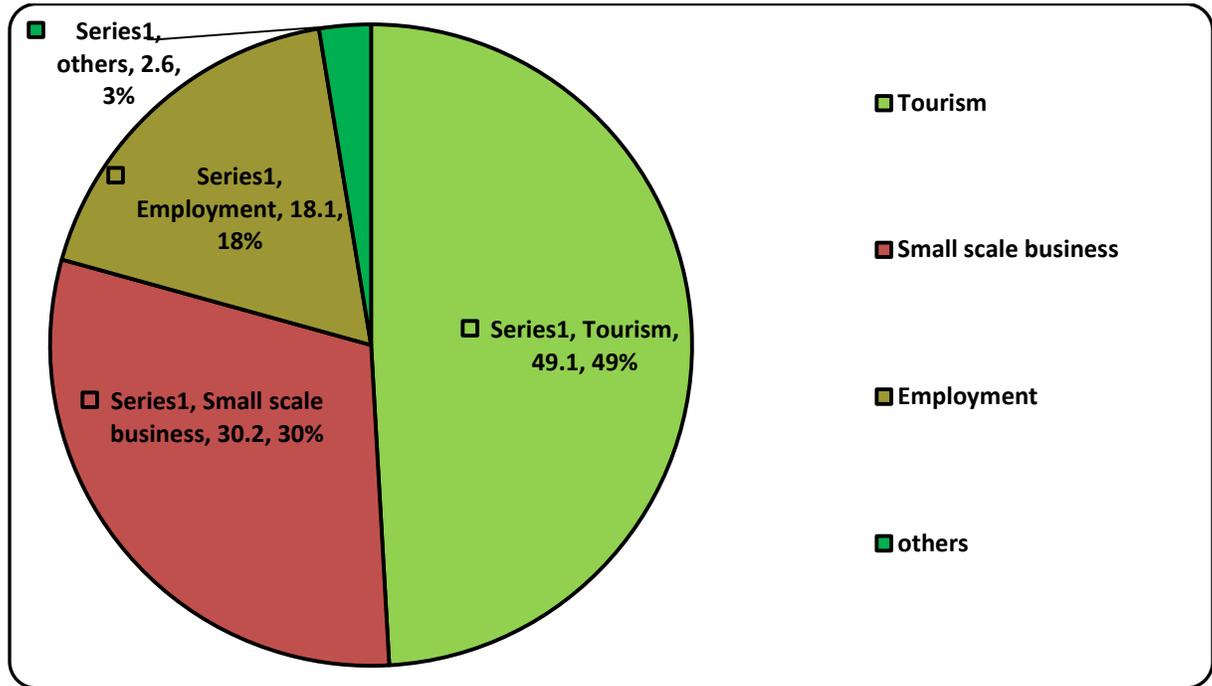


Figure 4. The per cent reliability of community economic activities apart from livestock keeping.

The NCAA management distributes revenue to each ward through the PC which then distributes funds to villages and individuals. When asked how are funds distributed 69 (59%) responded correctly that revenue is distributed through the pastoral council, ward and village, 41 (35%) responded that revenue distribution is through individuals and 7 (6%) said through the ward and village to individuals. When NCAA/PC personal were asked this question 36 (95%) responded correctly, 1 (3%) responded that revenue is distributed through individuals and 1 (3%) that revenue distribution is through the ward and village to individuals.

We measured revenue impact to determine if it was high, medium or low in the communities' livelihood in regards to restocking, education, medical services, livestock services and food security. The response for restocking was 40 (36%) high, 66 (59.5%) medium and 5 (4.5%) low. The response on tourism revenue support to education in the communities was 85 (75.9%) high, 21 (18.8%) medium and 6 (5.4%) low. For livestock services, the response to tourism revenue supports was 92 (80.7%) high, 17 (14.9%) medium and 5 (4.4%) low. The response to tourism revenue support to food security was 89 (76.7%) high and 27 (23.3%) medium and 0 for low.

The sharing of revenue has consequences for natural resources conservation. The survey measured the level of understanding of the communities and NCAA/PC respondents on the impact of revenue sharing on the conservation strategies in Ngorongoro. For the communities, 94 (81%) said that wildlife increased and 23 (19%) said it had not. In addition 84 (72%) said that the numbers of elephants and rhinos had increased in their area. The response from the NCAA and PC staffs also believed that tourism has improved conservation (30, 73%) and also that the number of rhinos and elephants have increased (30, 73%).

### *Survey #2*

The full results of this survey will be presented in a separate paper. However, this paper presents some of the results as it pertains to tourism and its economic impact on the local Maasai four years after the first survey and after more Maasai began working in tourism. All said that working in tourism is an acceptable way for earning a wage. When asked how tourism has been good for you, 83% said they can earn more money and 55% said it allows them to pay school fees (they could give more than one answer to this question). When they were asked is tourism making your life better, 71% said yes, 11% said worse and 11% said sometimes better, sometimes worse. When asked how tourism has been bad for you, 20% said it encourages children to leave school, 11% said it destroys the environment but 36% said nothing bad. Hence, taking these questions together, most interviewees had a very positive attitude towards tourism.

When asked about working in tourism, 25% said they or a family member works in tourism, 61% said no; this is interesting as 43% work in a Cultural Boma. We do not know if many of these people feel working in a Cultural Boma is working in tourism or they consider working in tourism to represent jobs outside the Cultural Boma. When asked what opportunities do you see in tourism, 25% said selling beads (all women), 25% said working in the Cultural Boma (hence there may be a dichotomy between selling beads and working in the Cultural Boma in the minds of many women) and 22% said guiding. When asked what tourists want to experience while in the NCA, 96% said wildlife and Maasai culture and 4% said taking photos to sell.

## DISCUSSION

Tanzania has promoted tourism as an important component of GDP growth. Ngorongoro Conservation Area hosts almost half of the tourists that visit Tanzania every year and earns about \$30M annually from park fees. Since the NCA's establishment in 1959 as multiple land use conservation area that includes the indigenous population (as opposed to the classical Fortress park strategy of conservation in which the indigenous population is removed from the park and settled outside of the park), community social and economic development and the welfare of the local population are important mandates of the NCAA. Revenue sharing is part of the NCAA's strategy to manage the

area resources for the coexistence of wildlife and human pastoralist activities. However, revenue sharing from the NCAA to the local population and/or villages is a passive type of community development. It does not directly generate jobs and individual economic development. Recently the local population through ward, village and/or individual initiative have accepted and adapted tourism as a complementing economic activity to livestock, their primary economic activity. Financial and development transparency is an important aspect for communities' tourism economic gains and in the NCA it is achieved by funnelling all moneys and decisions through the locally elected PC which channels moneys to the villages.

Livestock keeping is the main economic activity of the communities in the NCA. In the last decade, it has gone through several calamities and decline and the livelihood of the communities in NCA was badly affected. Subsequently tourism has been given a high priority as an alternative activity that complements the declining livestock economy. Today tourism activities contributed almost 70% to communities' money economy. Robertson et. al, (2000) argued that, tourism is one of the few forms of sustainable use that can be used to enable local people to derive economic benefit from a protected area and view the site as an asset that brings additional economic opportunities to their community.

Joint involvement of the communities through conservation and tourism communities and the NCAA staff has produced a winning strategy for economic development. Direct involvement of the communities was discussed by the communities and the NCA/PC staffers interviewed during the first survey. Among the successful examples were walking safaris, campsite operations and the Cultural Boma management as emphasized in the second survey. However, the level of involvement within the communities differs according to the type of activities. Cultural Boma operation seems to be the main activity that involves both sexes and considered to be more directly beneficial than walking safaris and campsite operation which require high levels of commitment and involvement with a high level of education within the communities. The survey realised that socio- economic benefits from tourism may promote individual and communities livelihoods in natural areas. (3) commented that more tourism opportunities to the communities in Okavango Delta promoted individuals and communities livelihood.

Furthermore, the involvement through organised groups, e.g. Cultural Bomas, produces positive images of tourism for the NCA's local population. The handcrafts sold in most of the Bomas are made and owned by the members of the communities, both those who live inside and outside the Cultural Boma, and once an item is sold the money is given to that person. The surveys recognised this as an excellent way of sharing tourism revenue among the local population. To make tourism more of an economic activity for development in NCA, assets such as walking safaris, Cultural Boma operations and selling of handcrafts are highly promoted by the NCAA and the communities and benefits both the individuals working in that area and the community as a whole. Tourism is helping to improve the domestic economy of the Maasai Community in the NCA.

Tourism activities were noted to have a positive impact on the other economic activities in the communities of the NCA. However, the increase of small-scale business in the NCA may have contributed greatly to the decline of local traditional livestock economy, and if not controlled will negatively affect the management of natural resources. While cultivation was suggested as an alternative to the decline of livestock in 1991/92 it is not compatible with conservation of natural resources and wildlife and as such is illegal. The tourism activities introduced as an alternative economic activity in the NCA, well planned and utilizing the best marketing structure, changed peoples' attitudes to conservation of natural resources. This study strongly supports the hypothesis that when communities are given opportunities to work in the tourism industry, they can change negative to positive attitudes by creating programmes to encourage tourism in their area and boost their economy (Binns and Nel, 2002). The NCAA and the local communities have together agreed that tourism is an incentive to conservation of natural resources.

The second survey, conducted four years after the first, reinforced the earlier results in that the Maasai, for the most part, support tourism development and views it as an important component in their economic development

## SUMMARY AND RECOMMENDATIONS

Tourism can be an excellent alternative to or complementary to other economic activities to communities' livelihood if benefits are shared among the communities and people living in each community. Controlling leakage will allow for more revenue to remain in the communities. The more transparent are tourism's benefits to the communities, the greater the respect for tourism and the realization of its impact on peoples' lives. However it does require a greater awareness of the NCAA's activities and support for tourism among the local population. While communities in NCA acknowledge tourism revenue as being an alternative to their traditional livelihood economy, there is poor understanding of benefit sharing to the people at lower levels in the community. This can bring disagreements that may interfere with community tourism development and thereafter threaten the conservation of natural resources. This study argues that tourism revenue is a complementing source to the economy of the communities but it is not an alternative for everybody because some still don't know what it means or its significance; fewer people benefit than should. Nevertheless, tourism being a growth industry in the NCA will compensate for a decline in livestock keeping which the primary economic activity of the communities by employing young people who are the future power of the communities' economy.

Direct and indirect revenue sharing to the communities is high in NCA compared to the other pastoralist in communities outside the NCA. The impact will continue attracting immigrants into the NCA pending the re- settling of immigrants outside the area. Clear procedure of who to involve in communities and how to involve them, may be a device to manage the population derived from immigrants in the NCA. The present

coordination can be improved to maintain the recent believe that tourism can complement the communities' economy in the NCA and education on the nature of the activities should be made to the communities in the NCA. It is however not clear that through the present tourism structure that communities value the conservation of natural resources (Kideghesho, 2006). The study's findings concluded that the communities value tourism because of the present benefit which possibly may not be sustainable because of the fragile nature of the tourism business. Nevertheless, if the value of tourism is to be appreciated by the communities, the benefits of keeping the resource should exceed the costs it causes and become able to reduce the level of poverty while complementing the communities' livelihood economy.

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# SUSTAINABLE TOURISM DEVELOPMENT STAKEHOLDERS, DIFFERENT SHADES OF GREEN

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## ABSTRACT

*The purpose of the study was to determine what impact multinational franchisor brands' agreements have on a developing country's pursuit of green/sustainable tourism development. Costa Rica was selected for this study based of its status as developing country, international perception that it is an example of sustainable tourism development, and its popularity among travelers from North America; source of majority of travelers to Costa Rica. Nine in-depth interviews of tourism industry operators, government, and academia leaders were conducted. Data collected confirmed different perceptions of what green/sustainable tourism development means to different sectors of the tourism industry and impact multinational brands franchisors' agreements have on sustainability of tourism development in developing countries.*

**KEYWORDS:** Green/sustainable, Multinational Franchises, Tourism

## INTRODUCTION

Tourism is one of the world's largest industries, one of the highest sources of employment, and a generator of foreign exchange for developing countries. The United Nations World Tourism Organization (UNWTO) reported more than one billion international tourist arrivals in 2012 and estimates, one in every 11 jobs and 1.8 billion tourist arrivals by the year 2030 (UNWTO, 2013). UNWTO asserts, with good reason, that "Tourism is one of the largest and fastest growing economic sectors in the world, and has a considerable role to play in delivering sustainable development in many countries." (UNWTO, 2013, p. 12).

The Inter-American Development Bank (IADB) states, about tourism and IADB's relationship with the UNWTO to fund tourism development in Latin America and the Caribbean, that their collaboration will "... contribute to the process of economic and social development in Latin America and the Caribbean through tourism. The sector is one of the largest and fastest growing in the region, and plays a critical role in creating jobs, providing foreign currency and generating and distributing wealth" ([www.iadb.org](http://www.iadb.org), 2011).

In the tourism industry Costa Rica is widely viewed as a model of sustainable tourism development and a popular destination for *eco* or *green* tourism (Honey, 2003). Since early nineties Costa Rica's tourism industry has experienced continued growth. In

2012 its tourist arrivals increased by 8 percent over 2011 for a total of more than two million tourists (UNWTO, 2013). In order to sustain tourism's growth and for it to continue to generate foreign exchange, growth needs to be planned with the environment in mind, promotion of social equity while guaranteeing profitability to tourism businesses and ensuring that all these are supported by governmental institutions. When one considers that the total population of this small nation is just over four million and that the greatest hotel growth in recent years has occurred in the area of all-inclusive resorts operated by large multinational hotel brands, one cannot help but question how *green* its tourism development has been.

Sustainability is a term widely utilized and holds different meanings for different people and contexts. Butler (1999) states that,

To the tourist industry, it means that development is appropriate; to the conservationist, that principles articulated a century ago are once again in vogue; to the environmentalist, it provides a justification for the preservation of significant environments for development; and to the politician, it provides an opportunity to use words rather than actions (p. 11)

Sustainable development remains one of the most contested terms in recent academic research and literature and although tourism is a relatively new area of research, sustainability of its development has generated a great deal of scholarly research and debate.

Costa Rica's ideal geographic location, between North and South America, allows it to have a rich biodiversity and to enjoy diverse micro-climates that make this country a great destination for wide-ranging tourism activities. Costa Rica has a total of 200 square miles, 25.58 percent of which have been designated protected land. It is home to 5 percent of the world's biodiversity, with coastlines in both Pacific and Atlantic oceans and has an average temperature of 72 degrees Fahrenheit. It also possesses rain, cloud, dry, and transition forests ([www.visitcostarica.com](http://www.visitcostarica.com)). With all its natural offerings it is no surprise that Costa Rica is a tourism success story and a strong reason to preserve its environment and ensure sustainability of its future tourism growth.

The purpose of this study was to investigate whether multinational tourism brands in Costa Rica, and some of their franchising requirements, have had an impact on sustainability of tourism development. Costa Rica's commitment to sustainable tourism development is strong and to this end has developed and implemented a certification program for tourism development (Certification for Sustainable Tourism [CST]) that is highly regarded and has received international attention. Indeed, sustainable development in Costa Rica is so important that ex-president Oscar Arias Sanchez, recipient of 1987's Nobel Peace Prize, stated in 2009 that Costa Rica would become carbon neutral by the year 2021, its 200<sup>th</sup> anniversary ([tico.times.net](http://tico.times.net)).

It is important to note that in the tourism industry the term *green* is associated with sustainable practices. If Costa Rica is to maintain its standing as "...the poster child for ecotourism," (Honey, 2003) there is a need to examine role tourism developers play in

ensuring tourism development is green/sustainable. Are multinational franchisors, who claim sustainable practices in their national websites, demanding sustainable practices from those they grant franchises in countries of the South.

## LITERATURE REVIEW

The idea of tourism as a development agent for countries of the South began to receive attention in the 1960s when development of larger aircraft, awareness of underdeveloped natural landscapes, onset of tour operators' affordable group travel offerings, and expansion of middle classes in countries of the North, made growth of mass tourism possible. Tourism as development became important enough to receive attention from the World Bank and Unesco, both organizations funded a seminar - comprised of international tourism researchers and officials - to consider social and cultural impacts of tourism and how to address concerns of its impacts (deKadt, 1979).

Globalization, consumerism and environmental deterioration are all issues that impact tourism and its sustainable development. In his analysis of the present environmental crisis Leff (2004) argues that it is the result of a global economy, consumerism and misuse of our natural resources. In tourism context, multinationals' expansion in developing countries tourism markets, universal desire for development of new and untouched destinations for tourists' consumption, and impact that development of new destinations have on natural resources, support Leff's argument. Gudynas (2003) states that *nature* was globalized and re-conceptualized in the 1980s as *capital* thus giving it an economic value. Nature, he argues, can then be assessed as having monetary value and therefore preservation of natural resources has become an investment. His assertions cannot be more accurate in any other industry than in tourism where landscape and nature are at the core of tourism development and therefore the necessity of its development to be sustainable. When UNWTO forecast 1.8 billion tourist arrivals by 2030, sustainability of tourism development becomes essential if it is to continue to be a source of foreign exchange for countries of the South.

Mowforth and Munt state the tourism industry has seized the term *sustainability* as its own and as a way to give tourism development an image of integrity when in reality mass tourism growth is a cause of environmental, social, and cultural decay as well as a source of economic inequality. Within the tourism industry, they argue, different groups define *sustainability* differently, e.g. multinationals utilize it to convey a message of environmental protection in order to make their product more attractive to consumers whereas local groups and communities define it as a commitment to preserve the environment and local culture; sustainability, Mowforth and Munt contend, is a social and political construct (2009). The term *sustainable* is also charged with political and power meaning and this becomes evident when one considers that non-governmental and transnational financial organizations, that strongly support and fund sustainable development projects, are all located in countries of the North.

In the development process of sustainable tourism in countries of the South, history plays an important role. In Latin America, in particular, it impacts perception of

tourists by local communities and it also impacts how multinational tourism organizations conduct themselves and their interpretation of sustainability.

Nash (1989) defines imperialism as “expansion of a society’s interests abroad” (p. 38). Tourism development, as a foreign exchange generator, has intensified growth of multinational brands in countries of the South. Although tourism development is viewed as opportunity to generate foreign exchange to support countries of the South’s economies, this growth is intended to accommodate needs and wants of visitors from countries of the North. Ownership of airlines providing transportation to destinations in the South and expansion of multinational hotel brands in these locations are evidence of imperialism practices and support the statement that tourism is a practice of imperialism. Dependency of countries of the South on countries of the North is historical, with raw materials in the past and tourism in modern times.

From a colonialism perspective, Memmi (1967) states that the colonizer “In organizing their daily habits in the colonial community, they imported and imposed the way of life of their own country...from which they draw their administrative, political and cultural inspiration” (p. 5). Similarly, when tourists from countries of the North vacation in countries of the South, multinational tourism industry brands make every effort to accommodate tourists’ way of life in the North where hotel brands are headquartered, viewing visiting location as politically unstable and lacking, what they perceive as, culture. Tourism then becomes a new practice of colonialism.

On the subject of sustainable tourism development, Moscardo (2009) poses a concept worth considering when tourism is envisioned as a development tool for a community. She states that tourism development takes place under direction of external agencies such as non-government organizations or financial transnationals and thus there is no input from community members in the development process; a requirement for sustainable development. Community members are perceived as lacking knowledge and therefore development of tourism is left to academics and industry experts and thus market rather than community driven. Liu (2003) supports Moscardo’s statement by arguing that those who write about sustainable tourism development fail to note that often, local communities lack power to control development of tourism in their own communities. Moscardo proposes that a better idea would be to develop a sustainable community that could support sustainable tourism development rather than making development of sustainable tourism the objective. A community can be better served by educating and training its members in areas that can allow for tourism to be developed, e.g. agriculture, arts, food, etc. A developed community can better determine how and what kind of tourism they can support and do so in a sustainable manner (2009). Moscardo’s concept is supported by Butler’s argument that sustainable tourism development and sustainable development are two different notions, thus if study of tourism is to be developed a need exists to take it out of *sustainable development* context and place it under *sustainable tourism development* (1999).

To date the study of tourism has been mostly linear and cause-and-effect based, Farrell and Twining-Ward call for a need to study and develop sustainable tourism from a

systems perspective, they state that sustainability "... has evolved over three decades from an environmental issue to a sociopolitical movement for beneficial social and economic change" (p. 275) and thus a need for tourism development to take a multidisciplinary approach. The context in which tourism now operates is highly multidisciplinary, i.e. when one studies tourism it is essential to consider climate change, cultural and social impacts as well as sustainability (2004), a linear approach will not provide one with an accurate assessment.

True sustainable practices in tourism are paramount if tourism is to continue to be an economic driver for countries of the South. *Greenwashing* is how an organization disguises its non-sustainable and/or non-environmentally conscious activities to sell its products and/or services, it is defined as "expressions of environmentalist concerns especially as a cover for products, policies, or activities" ([www.merriam-webster.com](http://www.merriam-webster.com)). In tourism, *greenwashing* has been widely practiced and thus far accepted by uninformed consumers. Font and Buckley (2001) have dedicated an entire book to *ecolabelling* and how to make it a successful practice, their book's introduction begins with the statement "Green sells" (p. 1); this introduction can lead one to perceive *ecolabelling* and *greenwashing* as synonyms. Font and Buckley state that in tourism exports, unlike exports in other industries, export takes place mostly from countries of the South to countries of the North, however tourism (the product) is experienced in countries of the South and thus "environmental laws in destination nations apply to international and domestic tour operators alike" (2001, p. 26). One may interpret this statement as meaning that multinationals that operate in countries of the South are subject to environmental laws of those countries and proceed to give multiple examples of where this statement does not hold true. Font and Buckley also support establishing international ecolabels since multinational tourism companies can globally promote their services and thus "International ecolabel schemes fit well into this strategy" (2001, p. 249). Taking a global marketing approach to green/sustainable tourism development can only benefit multinationals and countries of the North whose new middle classes are always in pursuit of new untouched destinations for their continuous desire for consumption.

Costa Rica's pursuit of green/sustainable development is at the core of its economic growth and thus implementation of Certification for Sustainable Tourism (CST) is of great importance. CST started in early 1990s as *Green Seal*, its name was changed in 1994 when ICT (Instituto Costarricense de Turismo) determined that they wanted to award a *certificate* rather than a *seal*. At the same time they also recognized great potential for foreign exchange generation from tourism by recognizing that Costa Rica is a small country with 5 percent of the world's biodiversity and almost 26 percent of its territory designated as conservation areas, because of its size it is easy to travel from one end of the country to the other. The purpose of CST was to evaluate sustainable operations at governmental level. CST was created with participation of central government, local communities and tourists. Tourism enterprises are audited, eight days later the ICT group in charge of auditing reviews results and ensures that all information required has been provided by the enterprise. Results from ICT's audit are submitted to a Board comprised of members of one of leading graduate schools of business in Latin America, Ministry of Health, National Chamber of Tourism and leading Costa Rican

university for final approval; this process was instituted to ensure transparency and to take politics out of the certification process. CST consists of five levels. An enterprise can earn from one (first steps of sustainability practices) to five (an enterprise that complies with all CST sustainability requirements) levels. CST indicators are not fixed but reviewed regularly for update (ICT Official, personal communication, August 26, 2013)

## METHODOLOGY

This study was guided by a desire to establish connections between tourism multinational franchisors' agreement requirements and their impact on Costa Rica's pursuit of green/sustainable tourism development. Establishing connections between multinational franchisor's agreements and their compliance with Costa Rica's sustainable tourism development laws could contribute, I believed, to sustainable tourism development education. A basic qualitative study approach was applied, data were collected through personal in-depth interviews to facilitate author's interpretation of how franchisees assessed franchisors agreements' requirements for green/sustainable tourism practices (Merriam, 2009). Two questionnaires (Appendices A and B) were designed, one for franchisees and one for ICT.

Sustainability is a very current topic and Costa Rica – context of the study – is generally cited as an example of sustainable tourism development. Data were collected from three different sources within the tourism industry (hotel and tourism operation industries, government and academia) and with in-depth interviews and personal observation (Yin, 2008). This study was grounded on the premise that multinational franchisors' agreements have an impact on sustainability of tourism development.

Nine participants were selected (Table 1) based on role they play in operation and/or development of tourism in Costa Rica. The Corporate Director is in charge of selecting and negotiating agreements with multinational franchisors. The President/Owner of national transportation company, Owner of family owned small resort, and small mountain family owned hotel's Sustainability Manager provided perspectives of challenges faced by no-brand recognition enterprises. The Director of Services and Assistant Chief Engineering of multinational brand resort, provided a multinational franchisee point of view from an operations perspective. The official from the Tourism Ministry provided history and overview of tourism development in Costa Rica and a background of the CST program. The Director of the tourism program at the national university provided an insight of multinational franchisors' impact on green tourism development and the central government's role on growth of non-green tourism. Although small, the sample is representative of tourism stakeholders and role they play in development and operation of tourism in Costa Rica.

Table 1 – Participants

<i>Industry Segment</i>	<i>Position within Organization</i>
<b>Hotels/Restaurants</b> (4 hotel multinational brands 1 multinational restaurant brand)	Corporate Director
<b>Ground Transportation</b> (small operation)	President/Owner
<b>Hotel</b> (small mountain family owned)	Sustainability Manager
<b>Car Rental</b> (multinational brand)	Suru Raku Chief
<b>Hotel</b> (multinational resort)	Director of Services Assistant Chief Engineering
<b>Destination Management Company</b> (multinational brand)	Marketing and Contracts Supervisor
<b>Hotel</b> (family owned resort in area designated for future tourism development, under opposition by community)	Owner
<b>Tourism Ministry</b>	Sustainability Program (CST) - member of original program’s development team
<b>Academia</b>	Director Tourism Program, University

Participants association with different areas of the tourism industry, I believed, would provide two or more similar assertions that would allow me to determine if replication could be claimed (Yin, 2008).

## FINDINGS AND DISCUSSION

The major part of tourism sustainability literature reviewed for this study focused on community tourism development. Butler argues that sustainable tourism is linked to small scale development and by default mass tourism is perceived as unsustainable development (1999). This study was designed to review sustainable development of tourism in Costa Rica as a country, thus a national rather than community perspective. In addition, this study considers the environment, local communities, government institutions and enterprises’ profitability as principles of green/sustainable tourism development.

***The environment.*** Sustainable tourism development in Costa Rica cannot be researched without understanding the role Instituto Costarricense de Turismo (ICT) plays in Costa Rica’s tourism development. ICT is a quasi-government organization and although it operates as a private organization its President holds the post of Costa Rica’s Minister of Tourism. New tourism projects, however, have to be approved first by local municipalities and the National Environmental Technical Secretariat (SETENA). SETENA, also known by realtors as the “environmental gatekeeper,” conducts environmental feasibility studies and forwards new project plans to national electric and water companies. After approval is received from a local municipality, SETENA, water and electric national companies, the project is submitted to ICT for final approval. This extensive approval process of new tourism projects has been designed to ensure that new

tourism development is sustainable (ICT Official, Personal communication, August 26, 2013).

Tourism development in Costa Rica began with a goal to bring as many tourists as possible and by extending an invitation to multinationals to partake in this opportunity for growth; a need to reconsider this goal was realized by Costa Rica's Ministry of Tourism when Project Papagayo was already well on its way. Project Papagayo is the largest tourism project in Costa Rica and began as sun and sand tourism in early 1970's without a master plan. Under the present national tourism development plan this type of project can no longer take place and although Project Papagayo is considered mass tourism, government institutions are ensuring that some level of sustainability is achieved when new projects are approved in this area and under the original Project Papagayo plan. An ICT official, in charge of overseeing the sustainability of tourism operations in the country, stated "I have strong feelings about sustainability, we either are or are not; yes or no...." (ICT Official, personal communication, August 26, 2013). It needs to be noted that while government agencies want to ensure sustainable tourism growth in the area of Papagayo, multinationals find ways to circumvent these laws. Riu Palace (opened in 2012) provides a good example of how environmental protection laws are sidestepped by multinationals. In *Quebrando Los Huevos de Oro (Breaking the Golden Eggs)* (2010) conservationist Gadi Amit shows how a mangrove swamp was filled to expand the all-inclusive resort's guest entertainment area, how motorized vehicle tracks and those of tortoise – that had previously used it for nesting – crisscross. This, Amit states, is what multinational hotel chains are allowed to do and how laws do not apply to them. Riu, he argues, as an all-inclusive resort contributes very little to local communities since all meals and entertainment are included in the room rate. He displays records from SETENA that confirm existence of a mangrove swamp in the area used by Riu's expansion of guest entertainment facilities. The owner of the family owned resort, interviewed for this study, supports Amit's claim when she stated that in the area where their resort is located "...there is another hotel that's totally illegal, it has no permits, it cut down all its trees to put the place, it's totally overbuilt, it violates absolutely everything and everybody knows it, but they're politically connected." (Personal communication, August 8, 2013). From the University's Director of the Tourism Program and talking about Riu's project,

...as usual those projects have a high impact, very high impact, we must recognize that there are consortia that have completed projects in harmony with nature ...unfortunately not all do it...the idea is that the resource, the little resource that is left in the world's tropical areas is managed by the natives, people from those countries, and not by multinationals...the impact has been very, very, very big, it has not been possible to impose the tendency that is being promoted, that of ecotourism because behind all that we can see there is a growth – we cannot call it development – of infrastructure of high impact and the establishment of multinational brands focused on a very specific form of tourism that comes and takes its foreign exchange (University Program Director, Personal communication, August 30, 2013)

The Suru Raku at the multinational car rental franchise stated that it...“is more than anything else the lack of guidelines of the franchise contract that allows us to be sustainable.” When asked if there was any mandate in the contract for sustainable practices, the answer was a resounding “NO” and went on to explain,

...in the two years that I have been in this company, we have had visitors from corporate (Car Rental Brand) and they have come to see mainly things about income and partially of expenses....I have never heard and have no knowledge, nor in the training that they have sent to me, they have never touched the area of sustainability....not in the area of sustainability, of the environment, no (Personal communication, July 19, 2013).

This particular car rental franchisor has no requirements for recycling or sustainable operations, the only requirement to grant a franchise to a local tourism operator is for the local tourism operator to have an airport presence. In the United States, where this multinational is headquartered, its website claims to be “your earth friendly alternative,” their Overall Corporate Initiative for sustainable operations’ link could not be opened. Font and Buckley’s assertion that “environmental laws in destination nations apply to international and domestic tour operators alike” (2001, p. 26) can be debated and as Butler (1999) states if governments do not enforce policies set to develop tourism sustainably, most tourism businesses will not voluntarily comply with them. This multinational franchisor, while claiming to operate sustainably in its website, is in violation of three sustainable principles, i.e. environment, social, and business.

***Local Community and culture.*** Data collected confirmed other areas of unsustainable tourism development practices by multinational franchisors’ demands for operation of franchises and how these demands at times are in conflict with sustainability principles. For the multinational restaurant franchise contract, for example, “85 percent of the products were imported and...even the coffee! It was a problem because we had to serve (the franchise’s brand) coffee, that of course was not as good as Costa Rican coffee...we were successful in obtaining the waiver to serve coffee known as one of the best coffees in the world” (Corporate Director, Personal communication, July 10, 2013). Utilization of local products is one of sustainability’s tenets. Holder of this restaurant’s franchise also holds four multinational brand hotel franchises; when asked if franchisee had any saying on display of art at hotels,

This is a very interesting point..... We wanted to display photographs of Costa Rica scenes and the franchisor said “no,” after 10 years of trying to explain to them that tourists come to a country to experience the culture and to see examples of culture, the franchisor finally allowed us to display local art not only in public areas but in rooms as well. In terms of local resources it is the same. (Corporate Director, Personal communication, July 10, 2013)

Display of local culture manifestations was not allowed by franchisor nor was there support of local artisans, this practice counters sustainability tenet to support local community.

**Government institutions.** As deKadt (1979) states, most developing countries that perceive tourism as a mean for development and source of foreign exchange, lack an entrepreneurial national sector as well as a source of well-trained tourism management personnel, thus a need to rely on foreign talent and financing for development of tourism. DeKadt's statement is supported by Moscardo (2009) when she asserts that tourism development is left to academics, industry officials and financial transnationals. This is evident in Costa Rica when its government conceptualized Project Papagayo, in the early 1970s, without a master plan. DeKadt (1979) asserts that the extent of "tourism planning" in most developing countries has been remedial; Costa Rica's Project Papagayo illustrates his assertion. As stated by Costa Rica Tourism Ministry's Official

....we tried to prevent development Cancun type....norms and regulations that they (franchises) have and have to comply with are very high, very, very high, for example, they have to have water treatment plants; considering total capacity they have to provide water supply, they have to have water reutilization....but there is something more important, the benefit that they provide to the community where the project is located so that is where the development of Papagayo is heading (ICT Official, Personal communication, August 26, 2013)

Unfortunately for many local communities where Project Papagayo "is now heading" is too late. The government's remedial actions were implemented with Sustainable Tourism Development plans 2002 – 2012 and 2010 – 2016. As the University's Tourism Director asserts, "all the international promotion that the ICT conducts is to promote the international consortia....we pay taxes to pay for the ICT to promote at international level, but we never see them promote a community organization that is practicing tourism." (University Program Director, Personal communication, August 30, 2013)

Government institutions need to get closer to communities and assess communities' needs. From sustainable tourism development's perspective, local communities need tourism planning and development expertise, as the hotel's Sustainability Manager affirmed,

I believe that there is a remoteness, a breach too big between the establishment of policies and legislation and the lived reality of Costa Ricans....on the one side you hear a speech about Costa Rica and on the other side there is the reality. So there is a breach between what is being said at an international level and the reality that the people are living. I am working closely to the situation, I know what the government is saying and establishing those regulations are very far from what I can comply with. (Personal communication, July 30, 2013)

**Business profitability** is as important as the other three sustainability tenets, businesses operate under the premise of profit; tourism is no different. Local tourism businesses find themselves at a disadvantage when they do not hold a multinational franchise, as stated by the President of a local transportation company,

....there are some persons who are willing to pay more because they are using a franchise compared to another organization that perhaps will provide the same or better service and they charge less, so some people...have the mentality that paying more is a sign that they will receive good service, sometimes this is not the case....there is one – let's say – disadvantage because you are competing with a name with recognition and this is when it is difficult to achieve to make a niche in the market, to achieve a position in the service, whatever it is in terms of franchises against a company that has no franchise name (Personal communication, July 11, 2013)

The choice of a multinational tourism franchise by a local tourism business is largely based on creating name recognition by travelers; Costa Rica's main source of travelers are the United States and Canada, thus a choice of franchisors from overseas, as stated by the Corporate Director,

....if the tourists....who stay in our hotels, a 95% consume breakfast we have to look for a franchise that is strong with breakfast so we concentrated in looking for three or four franchises and it is obvious that the one that interested us the most was (brand name)....for a foreigner to visit a (brand name) and feel like he is in California, in Austin Texas or in New York or in Dallas is an experience that (brand name) is going to give to that foreign tourist (Personal communication, July 11, 2013).

Profitability sometimes takes precedence over sustainability; for the car rental franchisor

....hybrid cars have not been taken into consideration for our business plan for the next five years, in other words it has not been taken into account to have them, we realized that it is not something that benefits the business, well there is an important point here, the government does not help with this issue, the taxes for a hybrid car are higher than for a normal car (Personal communication, July 19, 2013),

This car rental franchisee had offered hybrid cars in the past, higher government tax rates prevented them from continuing this practice since it impacted profit margins. *Green* for local businesses means foreign franchises with name recognition and as a result great economic *leakage* as well as non-green tourism.

## CONCLUSION

It is a fact that Costa Rica's tourism is dependent on tourists from North America, both United States and Canada. From a total of a little over two million tourists in 2014; 1,169,992 tourists were from Canada and the United States combined (visitcostarica.com) as a result most multinational franchises are from North America, i.e. Marriott, Hilton, Hertz, Four Seasons among others. Having been a Spanish colony most of other multinational franchises are from Spain, i.e. Riu, Barcelo and Occidental, for the most

part all-inclusive resorts; there were 64,303 tourists from Spain in 2014 (visitcostarica.com), largest generator of European tourists. When one considers that all-inclusive resorts generate great economic *leakage* for the area in which they conduct business and as United Nations Environmental Programme (UNEP) states, “In most all-inclusive package tours, about 8 percent of travelers’ expenditures go to the airlines, hotels and other international companies (who often have their headquarters in the travelers’ home countries), and not to local businesses or workers.” (2015); one can determine that multinationals operating in Costa Rica leave little economic benefit to local communities from their tourism operations.

While multinationals bear responsibility for their operations in developing countries; as Dredge, Ford and Whitford state, setting tourism policy is a difficult task because of the large number of participants in tourism operations; large number of participants in the operation also makes it difficult to effect change (2011). It becomes difficult to ensure that government’s sustainable tourism development policies are being followed by municipalities and multinationals. Although ICT and Costa Rica’s central government are attempting to ensure that new tourism projects are guided by established sustainability policies; multinationals and local developers find ways to circumvent these policies as demonstrated by Riu Palace and the new hotel development in Peninsula Osa.

On the question of ownership and if it would be more likely for sustainable development to be exercised when the enterprise is owned by nationals; for the sustainability manager at the family owned mountain hotel, ownership by nationals (who studied abroad) has an advantage because owners,

....are persons who were born in the community and they grew up here....they were away for some years, but they grew up in the community so they developed an appreciation for the environment, this has a big influence in their projections and how they overcome difficulties. (Personal communication, July 30, 2013)

For the multinational resort brand Director of Services, national ownership makes a difference because,

.... growing up in Costa Rica you see nature since you are a child, you don’t see excess of buildings, factories, concrete...so for example for me, I continue being that way. Yes, it has an impact, the place where one lives has an impact and the way you relate to it because it is different to do something just to do it or to do it because you have a force from within that moves you to engage others, to convince them to do the right things. (Personal communication, August 01, 2013)

Based on data collected, I conclude, that different tourism industry stakeholders have different perceptions of what constitutes green/sustainable tourism development, i.e. for government agencies, *green* relates to foreign exchange and for multinationals *green* implies profits. For members of local communities *green* is associated with low paying jobs and great negative impacts on local culture and environment; these are outcomes of foreign franchisors granting franchises without enforcing green/sustainable practices. While data collected did not establish a direct connection between green/sustainable

tourism development in Costa Rica and multinational franchisors, a more indirect claim can be made that while multinational franchisors state green practices in their countries' websites these practices are not part of franchising agreements in countries of the South. Hence, making Font and Buckley's "environmental laws in destination nations apply to international and domestic tour operators alike" (2001, p.6) statement not accurate.

It is clear that interests of North American tourists have undoubtedly been supported by North American multinationals and thus validation of Nash's (1989) definition of imperialism as "expansion of a society's interests abroad" (p. 38) and supporting the assertion that tourism in Costa Rica can be viewed as practice of imperialism. Disregard with which Riu, a Spanish multinational, treated the environment to expand its resort's recreational facilities supports Memmi's description of the colonizer as "...he has succeeded not merely in creating a place for himself but also taking away that of the inhabitant, granting himself astounding privileges to the detriment of those rightfully entitled to them" (1967, p. 9). Thus, perception of tourism as a practice of neo-colonialism, perception also supported by the fact that most Spanish resorts in Costa Rica are all-inclusive, providing little to no benefit to local communities where they operate.

Data collected also support the argument that sustainable tourism remains a highly contested concept with different perceptions by different industry members. Further research in a different country of the South with a larger number of participants may support, or counter, the author's claims.

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## Appendix A: Multinational Franchisees Questionnaire

- 1.- What impact did term and conditions of the franchisor's agreement have on your selection of franchise?
- 2.- What impact did brand recognition by North Americans had in your selection of franchisor?
- 3.- Has your organization applied for ICT's (Costa Rican Tourism Institute) CST (Sustainable Tourism Certification)
- 4.- Are terms and conditions of franchisor's agreement in conflict with ICT's CST requirements?  
  
If yes, follow up questions: which CST requirements?  
Did this have an impact on the owner's/your decision not to seek CST certification?
- 5.- Is the owner/are you a Costa Rican citizen?

## Appendix B: ICT/Costa Rica's Tourism Ministry Questionnaire

- 1.- Does the ICT [Costa Rican Tourism Institute] conduct Environmental Impact Assessments [EIA] when new tourism projects, e.g. resorts, attractions, hotels, etc., are proposed?
- 2.- Is it more beneficial when government regulates sustainable tourism development instead of industry itself?  
Why?
- 3.- Where in Costa Rica is tourism development controlled by local government/community and where by Costa Rica's central government?
- 4.- Which international financial institutions work with Costa Rica and its tourism development as source of foreign exchange?

LINKING INTERNSHIP OUTCOMES TO CLASSROOM LEARNING. A CASE  
STUDY EXAMINATION OF HOSPITALITY AND TOURISM MANAGEMENT  
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ABSTRACT

*This paper examines how student learning, undertaken via Hospitality and Tourism Management internships, complements and enhances knowledge previously gained through a traditional classroom setting. It specifically poses and answers four questions relating to preparation for the internship experience, links to classroom learning, the development of new skills and the connections between academic theories and practical application. While set in the context of a Case University, the study finds that students do feel the education they received prior to their internship had prepared them for the experience. In addition, there was statistical significance showing that theories discussed in class are important to them and examples of these theoretical approaches were evident during their practical experiences.*

Key Words: Internships, experiential learning, classroom learning strategies

INTRODUCTION

This study builds on two previous papers by Stansbie and Nash, 2013 on internship design with Hospitality and Tourism Management (HTM) students. The earlier studies examined the role internships played on impacting a student's satisfaction/motivational levels through an examination of work characteristics and career choices.

This paper seeks to build further on the previous work because the education and development of HTM students isn't simply a product of time spent in industry, but rather a collaborative approach between lessons learnt in a classroom setting coupled with those encountered as part of an experiential education process (internships). This combined approach to learning has great historical support in the literature from educational theorists including Dewey (1938), Freire (1993), Kolb (1984), Mezirow (1997) and Rogers (1995).

Collectively these two approaches help shape the academic and practical development of students and contribute positively (or negatively) to their attitude and affinity with their chosen education career. Therefore, in addition to assessing student outcomes from the internship experiences themselves, it is also vital to examine the effectiveness and connections between the theoretical approach to classroom learning, and the experiential component from internships with a view to understanding how these collectively impact their academic knowledge/development.

To this end, the purpose of this paper is to *examine the role experiential education (in the form of internships) plays in enhancing/confirming previous, academic knowledge gained, by the student, from a classroom setting.* Its primary objective is to examine the value of these learning experiences in an attempt to determine the complementary nature of each. The framework for this research will test the following hypotheses:

*H<sup>o</sup>*: The overall importance of the internship requirement for HTM students and the HTM education at The Case University prepared students for the internship are independent (not related).

*H<sup>a</sup>*: The overall importance of the internship requirement for HTM students and the HTM education at The Case University prepared students for the internship are dependent (related).

## LITERATURE REVIEW

In terms of its emergence in contemporary Hospitality and Tourism Management (HTM) education, the benefits of a curriculum complemented by ‘real world’ experiences have become more prominent and have received attention from many authors (Walmsley, et al., 2012; Zopiatis, 2007; Zopiatis & Theocharous, 2013, Stansbie, et al., 2013). The growth of interest and research into experiential learning has been partly driven by the expansion of HTM programs (Coco, 2000; Zopiatis & Theocharous, 2013) and the increasing development and internationalization of HTM education. A closer examination of curriculum offerings throughout the world would suggest that the most common form of experiential learning associated with HTM programs are internships (Zopiatis & Theocharous, 2013).

An internship has become a common part of the hospitality and tourism curriculum (Coco, 2000; Petrillose and Montgomery, 1998; Van Hoof, 2000, Wan et al., 2013). Its purpose, in theory, is to provide a higher education student with the opportunity to observe how the theoretical knowledge and learning gained in a classroom can be applied to a practical, professional setting (Van Hoof, 2000; Walo, 2001; Zopiatis, 2007). The desired outcome is to provide a greater understanding and appreciation of prior learning whilst nurturing a range of new skills to facilitate future competency development (Christou, 2000; Petrillose and Montgomery, 1998; Walo, 2001) and employment (Coco, 2000; Walo, 2001 and Waryszak 1999; 2000).

Research over the years has approached the subject of internships from a number of different perspectives (Zopiatis, 2007, Zopiatis and Theocharous, 2013). These range in size and scope but tend to be centered on the three key beneficiaries of the process namely: students, employers and education institutions (Busby, 2005; Coco, 2000; Leslie and Richardson, 2000; Petrillose and Montgomery, 1998; Stansbie, et al., 2013; Zopiatis, 2007).

Coco (2000:44) summarizes this as “Internships are a win-win situation for everyone, and the synergistic effect of the relationship among student, host company, and university benefits all participating parties”.

From an student’s perspective, the motivation for participation in an internship experience is driven by a need for practical skill development (Baum, 2006; Petrillose and Montgomery, 1998; Stansbie, et al., 2013; Zopiatis, 2007), the potential for enhanced academic performance (Blair and Millea, 2004; Little and Harvey, 2006; Wan et al., 2013) and the employment prospects it affords (Busby and Gibson, 2010; Coco, 2000; Gibson and Busby, 2009; Stansbie., et al, 2013). These typically come from employers who recognize that a graduate who has both the theoretical knowledge and practical skills, to complement their learning, can complete tasks more successfully and efficiently and thus learn their vocation faster and perform better in both the classroom and the workplace. This allows the employer to recruit to positions with greater confidence and potentially increases student opportunities for rapid promotion and professional development as they embark on their career ladder (Coco, 2000; Walo, 2001; Stansbie, et al., 2013; Zopiatis, 2007).

In addition, many studies show that the combination of both practical skills and theoretical knowledge provides increased opportunities for individuals to enter the industry at a higher employment level (Blair and Millea, 2004; Coco, 2000; Waryszak 1999; 2000).

Additional opportunities for enhancing post-graduation employment prospects are proposed by Coco (2000). His research suggests that employment opportunities can potentially prove more beneficial as an expeditious understanding of the workplace, the job responsibilities, and the organizational culture can positively impact productivity levels. Similar findings relating to interns returning to their employers upon graduation is found by Busby and Gibson (2010) and Gibson and Busby (2009). Coco (2000) further suggests that insights into an employee’s work ethic, attitude and technical competencies can be assessed first hand over an extended time period rather than through subjective judgments made during an interview.

## RESEARCH METHODS

In order to address the paper’s overarching objective, a mixed methods approach was utilized commencing with a questionnaire (developed and distributed to students enrolled in the Case University’s Hospitality and Tourism Management (HTM) program (n=499)) followed by a series of focus groups with consenting student participants.

While part of a bigger research project into internship design, specific questions were developed and asked in the data collection questionnaire that specifically addressed the relationship between experiential learning and knowledge obtained in the classroom. Over an 18 month period, surveys were proctored and returned with a goal to obtain a representative sample of the total student population at a mid-west based US University with responses distributed across varying levels of internships classes offered by the Case University (sophomore, junior and senior). Of the 339 completed surveys used for this research (68% response rate), the gender breakdown reflected a 24% male and 76% female mix with a mean age of 22.78 and class standing breakdowns reported as 71% seniors (year 4+), 25% juniors (year 3) and 4% sophomores (year 2). Freshmen (year 1) weren't considered for this study as they were yet to reach the internship component of the curriculum. Once the surveys were analyzed via SPSS software, a series of follow up focus groups were conducted with students to provide richer insights to the quantitative findings.

In order to test the hypotheses posed for this study, Pearson's Chi-Square was used to examine the independence of the two categorical variables (between classroom knowledge and experiential learning and the outcome of a student internship and its impact on academic perceptions). The tests checked if any significant differences were observed between the expected and actual results taken from the research sample. When running the Chi-Square tests, if significant differences occurred, this allowed opportunities to show if these relationships occurred by chance or if there were other factors affecting the results.

## FINDINGS

Four research questions were asked as part of the survey design in order to test the posed hypotheses. These were paired each time with how students perceived the importance of an internship as part of their overall education experience. The findings for each question are discussed below and are supported with commentary from the student focus groups.

**Research Question #1: HTM education prepared student for their internship  
Independence Test on Question 1**

The HTM education received at GVSU had prepared me for this internship.

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	36.987 <sup>a</sup>	1	.000		
Fisher's Exact Test				.000	.000
N of Valid Cases	280				
a. 1 cell (25.0%) has expected count less than 5. The minimum expected count is .39.					

Table 1: An edited summary of the chi-square test outcomes to address the perception of the importance of an internship against whether the HTM education received at the case university prepares students appropriately (Q1)

**INTERPRETATION AND DISCUSSION**

It can be seen in this first example, that some of the typical assumptions associated with Chi-Square interpretation are not met. In addition, the footnote to table 1 shows that 25% of cells are less than 5 and the smallest expected count is .39. Therefore an alternative, nonparametric test known as Fisher’s Exact was substituted. This method is only suitable in SPSS on 2 by 2 tables and uses a 2-sided (non-directional)  $\rho$ -value to see if the two variables are independent or dependent. The  $\rho$  -value given in table 1 is .000. Since this is less than .05, the null hypothesis that the two variables are independent is rejected. Therefore, the perception of the importance of an internship and the HTM education prepared students for their internship **are** related to each other for this sample. As a result of these assumptions not being met for the first research question, the author’s elected to use Fisher’s Exact test for all remaining analysis to provide a level of consistency to the interpretations.

	Disagree	Agree	Total
Disagree	4	14	18
Agree	2	260	262
Total	6	274	280

Table 2: Perception of the Importance of an Internship against whether the HTM education received at GVSU prepared students appropriately

Table 2 shows that the majority of students agree with both of these statements, which indicates that they find the internship important and confirm that, in their opinion, they are well prepared for it. A computation of responses provided from the questionnaire indicates that 262 of the 280 students (94%) agree or strongly agree that they have been properly prepared for the internship. This is a sound endorsement for the teaching team in the Case University's HTM program and clearly demonstrates that students have a strong sense that going into the experience that work undertaken through the pre-internship class and their understanding of the process is communicated well and helps in those preparations. In addition, the actual classroom knowledge gained through their HTM education, prior to commencing the internships, also underpins the experience and sets the foundation for future learning.

This conclusion is further confirmed through the focus group interviews where strong support is offered for the supportive nature of the learning environment at the Case University in helping prepare students for their work experiences. An example, reflective of student comments from the focus groups supports this by saying:

*'I think it's really cool when you can sit down in class and really relate to what the teacher is teaching. It's even better when you can put your input in to the topic at hand. Not all majors get to do that and we are very lucky that we can. I learn a lot in my classes and I learn just as much on my internships. When it comes to HTM it really is a great mix of learning and doing and when we get out into the real world all of our classroom knowledge will blend with our experience to make us great employees. I'm glad I've been able to take the things I've learned in the classroom into my work experience and vice versa.'*

(HTM Lodging Student)

**Research Question #2:** The skills I developed through my internship complemented the classroom knowledge I gained at the Case University.

**Independence Test on Question 2**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	1.869 <sup>a</sup>	1	.172		
Fisher's Exact Test				.259	.259
N of Valid Cases	290				
a. 1 cell (25.0%) has expected count less than 5. The minimum expected count is .29.					

Table 3: An edited summary of the chi-square test outcomes to address the perception of the importance of an internship against whether the skills learnt during the internship complement those developed in the classroom (Q:2)

**INTERPRETATION AND DISCUSSION**

		Disagree	Agree	Total
<b>Q2:</b> Internship skills complement classroom knowledge	Disagree	1	13	14
	Agree	5	271	276
	Total	6	284	290

Table 4: Perception of the Importance of an Internship against whether the skills learnt during the internship complemented those developed in the classroom

It can be seen that two of the three assumptions for this test are again not met with the minimum expected cell count being less than 1 (0.29) and one of the cells (25%), disagree/disagree, being less than five. In this scenario, the Fisher’s Exact 2-sided significance  $p$  -value is .259 which is greater than .05 and thus implies that the findings fail to reject the null hypothesis. Therefore, the two variables are independent and thus **not related**.

The results show that the skills a student learns as part of their internship aren't related to those gained via a classroom setting. This finding is important to the study as it confirms the underlying premise of the paper which advocates the use of experiential education as a complementary teaching and learning style to that of a traditional classroom setting. While Q1 showed that interns feel their education prepares them for the experience, Q2 indicates that, for the most part, the skills they learn on the job have an inherent quality that they are not known prior to the internship. Therefore, it would seem reasonable to conclude that what students learn in the internship is either different or serves to enhance what they may have previously learnt in the classroom. This finding has support in the experiential education literature where theorists and psychologists (Dewey, 1938; Freire, 1993; Kolb, 1984, Mezirow, 1997; and Rogers, 1995) advocate the need for alternative learning strategies to both develop and reinforce prior learning experiences.

These complementary learning strategies result in a better, more rounded student who has both the academic ability to comprehend and apply the theories associated with their profession to the practice of industry (Bullock *et al.*, 2009; Busby *et al.*, 1997; Busby, 2005; Collins, 2002; Knouse *et al.*, 2000; McMahon and Quinn, 1995; Petrillose and Montgomery, 1998; Van Hoof, 2000, Walo, 2001 and Zopiatis, 2007) and appropriate practical skills which ultimately enhance their future employment prospects (Bullock *et al.*, 2009; Busby and Gibson, 2010; Gibson and Busby, 2009; Coco, 2000; Clark, 2003, Inui *et al.*, 2006; NACE, 2009; Waryszak 1999; 2000). This finding is reinforced by student comments in the focus groups which offer:

*'Being in the classroom is great but I believe internships are where you get to put all of that classroom knowledge to use and really apply it to real situations. Having hands on experience is really what is going to prepare us for future jobs. Seeing and watching the event planners at work handle hard situations and get through them with class and confidence is exactly what I need to see before I go out in the real world and get in those exact situations. The classroom can only teach us so much but I believe getting out there and putting that learned knowledge to test is really what is going to help us stand out from any other student that does not have that hands-on-experience.'*

(Event Planning Student)

*'This internship has enhanced my classroom knowledge tremendously. It is one thing to learn the logistics in a classroom and being able to regurgitate the information back out for testing purposes, but it is another thing to actually take everything you have learned and put it into a job/internship.'*

(Event Planning Student)

**Research Question #3:** The Internship develops new skills not covered in the classroom

		Disagree	Agree	Total
<b>Q3:</b> Internship develops new skills not covered in the classroom	Disagree	5	34	39
	Agree	1	233	234
	Total	6	267	273

Table 5: Perception of the importance of an internship against whether the student learnt new skills during the internship not covered in the classroom

**Independence Test on Question 3**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	16.561 <sup>a</sup>	1	.000		
Fisher's Exact Test				.003	.003
N of Valid Cases	307				
a. 1 cell (25.0%) has expected count less than 5. The minimum expected count is .73.					

Table 6: An edited summary of the chi-square test outcomes to address the perception of the importance of an internship against whether the student learnt new skills during the internship not covered in the classroom (Q:3)

**INTERPRETATION AND DISCUSSION**

As is the case for the first two independence tests relating to the value of classroom learning (Q1 and Q2), the assumptions were not met due to one of the cell counts being less than 1 (25%). Therefore, the Fisher's Exact  $p$ -value checks for significance. In this example, it can be seen that the 2-sided  $p$ -value is .003 and implies that the internship has taught students skills and competencies not previously learned in the classroom. Therefore, it can be concluded that these are dependent and thus related resulting in a **rejection** of the null hypothesis.

Table 5 shows that 267 of the 273 students within the sample (98%) indicate they developed new skills as a result of their internships. This confirms that students find the internship important and, in their opinion, allows them to develop a set of skills and competencies not previously addressed through their classroom experiences. This again is an important finding as it further supports the conclusion drawn from Q2 that suggests internship skills aren't necessarily complementing classroom knowledge through replication but rather developing it further through alternative teaching and learning strategies. Neither these findings (Q2 or Q3 from the questionnaire) serve to diminish the value of classroom knowledge but simply indicate the role it may play by providing a foundation for other learning and development to evolve.

What is important is that students are able to see the value of their classroom learning to confirm its relevance in their education development, while at the same time they realize that, with the vast array of topics, skills and competencies that would need to be learnt in a classroom to be successful, some of that is happening through this alternative learning strategy. A study by Deale *et al.* (1998:27) examining current hospitality and tourism teaching finds a variety of teaching and learning methods used in the delivery of HTM education. Their conclusions suggest that 'Educators may be wise to confer and consult with their colleagues and peers to consider utilizing a variety of learning methods throughout a course. Most importantly, these results can help point toward the future of hospitality education and whether its educators plan to continue along a rather traditional path or move towards implementing more dynamic teaching and learning models and methods'.

As is the case in Q2 above, this adds further conviction to arguments for the inclusion of experiential education in the curriculum as it demonstrates that while part of the learning does take place in the classroom, this develops further through practice and thus enriches the student through application to the realities of industry. The comment below represents the consensus of student opinion obtained via the focus groups:

*'I have been amazed at how much my internship enhances the classroom knowledge I have previously gained. I feel as if those I work with have written the text from my previous classes. It has been a really good experience for me to see the things I have learned about in action. I am glad I have been able to put to use the knowledge I have gained in the classroom. It is very important to be able to apply what you have learned in the classroom to your internship. My internship reinforces what I have learned in the past while still teaching me new things.'*

(Event Planning Student)

In order to probe deeper and learn more about the types of skills and competencies developed most by the internships, the questionnaire posed additional questions asking students about how these manifest in their work. The rationale for including these questions is to ascertain how much of these skills and competencies students are exposed to in addition to the daily tasks of conducting their work. Some of the competency areas measured from the questionnaire included empowerment, initiative, problem solving, delegation and decision making and are again measured on a scale of 1 (strongly disagree that the internship developed the student in this skill/competency)

through to 7 (indicating a strong agreement to the presence of this skill/competency as part of their internship experience).

<b>Competency</b>	<b>Mean</b>	<b>Std. Deviation</b>
Accountability	6.05	1.06
Managing Change	5.25	1.43
Decision Making	5.38	1.48
Delegation	4.44	1.95
Empowerment	4.74	1.82
Flexibility	5.28	1.49
Initiative	5.80	1.82
Innovation	4.55	1.67
Interpersonal Skills	5.78	1.21
Money Management	4.30	2.00
Problem Solving	5.67	1.34
Use of Technology	4.73	1.88

Table 7: A summary of the mean scores calculated for competency development from the Case University's HTM student sample

Table 7 shows the mean scores for all twelve competencies indicated by the students as being present in their work with no single competence falling into a disagree (< 4) category. The highest observable means were Accountability, Initiative, Interpersonal Skills and Problem Solving indicating these as the most commonly developed competencies across a range of internships and emphasis areas. Meanwhile, Money Management and Delegation (which are often more associated with supervisory and managerial positions) are at the lower end. Conclusions drawn from this suggest that while some of these competencies are ingrained as part of a student's classroom learning, the developmental nature of the internship experiences are also providing additional opportunities for these to evolve. This finding contradicts a study offered by Sharp and Qu (2009) who investigate whether programs effectively prepare their students for the hospitality industry. Through an investigation of competencies taught at a US university, their findings suggest that although some graduates felt relatively prepared in the most important competencies (teamwork, learning autonomously and thinking critically), others felt that their education had fallen short of preparing them for their careers.

The use of an internship as a vehicle for competency development is supported by numerous authors (Knight, 1984 cited in Walo, 2001; Ford and Lebruto, 1995; Petrillose and Montgomery, 1998; Tas, 1988; Walo, 2001) each advocating the benefits to both a student's professional development and to employers in the form of access to future managers with the right skills and competencies to succeed. As student responses indicate, these are developed during their internships and further support the supposition of Q3 that these new skills and competencies enhance their professional development.

**Research Q4:** During my internship, I saw many examples of the theory discussed by my professors in class.

		Disagree	Agree	Total
<b>Q4:</b> Interns saw many examples of the theory discussed by their professors in class	Disagree	4	24	28
	Agree	4	275	279
	Total	8	299	307

Table 8: Perception of the importance of an internship against whether the student saw examples of classroom theory in practice

#### **Independence Test on Question 4**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	23.886 <sup>a</sup>	1	.000		
Fisher's Exact Test				.000	.000
N of Valid Cases	273				
a. 1 cell (25.0%) has expected count less than 5. The minimum expected count is .86.					

Table 9: An edited summary of the chi-square test outcomes to address the perception of the importance of an internship against whether the student saw examples of classroom theory in practice (Q:4)

## INTERPRETATION AND DISCUSSION

As is the pattern for the previous three examples, a Fisher's Exact test is used to test for independence due to the Chi-Square assumptions not being met. To this end, the 2-sided  $p$ -value figure in table 9 of .000 again confirms that the null hypothesis stating that the two variables are independent should be rejected. Therefore, it can be confirmed that the perception of the importance of the internship and the confirmation that students believe theories discussed in their classroom setting are **related**.

In this final analysis linking the value of classroom learning to a student's internship experience, it is clear that while students are developing new skills as part of their experiential education, these are underpinned by prior work undertaken in a classroom setting. This again supports the argument for approaching student learning and development with different teaching styles (Deale *et al.*, 1998). In addition, this finding serves as further endorsement for the teaching staff at the case university as it is clear from the student responses that the curriculum being taught is contemporary and has great relevance to the actualities of industry practice. In the Literature Review many student stakeholder benefits of internships are proposed and for educators this finding is key as not only does it help retention and graduation rates when students are engaged in their learning and obtain relevance from their education, but it also acts as a link with industry stakeholders by teaching relevant skills that assist them overcome some of the employment challenges inherent in HTM industries (Chi and Gursoy, 2008).

Having these two stakeholders working in concert will lead to additional benefits involving not only educators and employers but also students. These include improved networking (Zopiatis, 2007) and guest speaker opportunities (Lefever and Withiam, 1998) input on curriculum design (Leslie and Richardson, 2000), research projects (Walo, 2001) and employment opportunities for students (Busby and Gibson, 2010; Gibson and Busby, 2009; Bullock *et al.*, 2009; Coco, 2000; Clark, 2003, Inui *et al.*, 2006; NACE, 2009; Waryszak 1999; 2000). Linking internship learning to classroom theories is nicely summarised by:

*'For me, my internship mostly reinforced everything I have learned in the classroom. In class, professors always talk about ADR and RevPar, but until you see it in real life and learn how it directly affects a hotel, that's when it really clicks on what you're learning. The best part of an internship is putting what you learn in school into real life situations and seeing how to handle situations.'*

(Lodging Student)

## SUMMARY

This research set out to examine **“To what extent do internships enhance the classroom knowledge and educational development of HTM students?”** In order to address this objective, independence tests were run on four separate questions posed in the survey instrument. The purpose of these was to ascertain whether students feel they had been properly prepared for the internship, whether the skills they learnt

complemented classroom knowledge, if they had learnt new skills and competencies as a result of their internship and finally if they saw examples of theories discussed in class manifest in their practical experiences. Using Fisher's Exact, it was found that students do feel the education they have received prior to their internship had prepared them for the experience. In addition, there was statistical significance showing that theories discussed in class are important to them and examples of these theoretical approaches were evident during their practical experiences.

Finally, both the quantitative and qualitative data showed that as a result of their internships, students didn't necessarily see their classroom education as complementing their internship but rather underpinned the additional learning of new skills and competencies that occurred. This finding offered further support to embracing an experiential education approach within this case sample. Therefore, it can be concluded that even though the internship reinforces knowledge and theory previously discussed in a classroom setting, it also enhances this along with the professional development of the student.

## LIMITATIONS AND FURTHER RESEARCH

While the obvious limitations to this study centre on a case method approach and thus may not have wide reaching recommendations for a broader academic audience, what is helpful is how a study of this nature specifically helps department chairs and academic leaders in HTM programs develop teaching and learning strategies. The value and priority placed on experiential education has disparate support within the academic community and this study may motivate others to examine their curriculum and seek ways to complement their classroom education with a more applied focus. In terms of future research, this study could easily be widened beyond a case study approach in order to capture patterns of learners in the wider population. The methodology for this paper has proven to be sound and could easily be replicated with a greater number of participants from other geographical regions.

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MICE AND THE SPORTS HERITAGE EXHIBIT:  
A CASE STUDY OF VISITOR CLASSIFICATION AT THE NASCAR HALL OF  
FAME

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ABSTRACT

*The present study analyzed a total of 5,231 exhibition visitors who attended the NASCAR Hall of Fame Exhibit in North Carolina in order to identify underlying dimensions of exhibition indicators and classify dissimilar groups of visitors in the convention and exhibition sector. Principal Components Factor Analysis performed on Exhibition Indicators identified four possible dimensions labeled as “exhibits”, “staff”, “facility”, and “concessions” and a cluster analysis classified four dissimilar groups named as “nostalgics (cluster 1),” “service focused (cluster 2),” “venue aesthetic (cluster 3),” and “ancillary areas (cluster 4)”. Multivariate Analysis of Variance (MANOVA) and discriminant analysis were further applied to determine the validity of the four clusters, resulting in significant mean differences in the dimension across the clusters. There were also significant mean differences in the exhibition visitors’ overall satisfaction with the experience and future intentions across the clusters. Some sound managerial implications were discussed for convention managers and exhibition planners.*

Keywords: Convention and Exhibition; Factor-Cluster Analysis

INTRODUCTION

It has been cited that within tourism, the meetings, incentives, conventions, and exhibitions (MICE) industry is a growing sector both domestically and globally (Boo, Koh, & Jones, 2008; Jin, Weber, & Bauer, 2013; Oppermann & Chon, 1997; Weber & Ladkin, 2011). Conventions and exhibitions are regarded as significant contributors to the success of destination management by establishing a positive image of a city or town thereby attracting visitors, which in turn stimulates repeated visitors (Boo *et al.*, 2008; Jin *et al.*, 2013; McCartney, 2008; Kim, Yoon, & Kim, 2011; Wan, 2011). The benefits to cities hosting convention and exhibition events are increased revenues and taxes generated from visitors’ direct and indirect spending, increased employment opportunities for local residents, and improved local infrastructure to meet visitors’ needs and benefits local residents after the event (Grado, Strauss, & Load, 1998; Lee, Lee, & Yoon, 2013; Lee, 2006). Further, cities ability to serve as a host destination for tourists

will allow for more sustainable and competitive meetings and exhibition events that impact convention tourism.

Various discussions link conventions and exhibitions together instead of treating them as two separate entities, Jin *et al.* (2013) stresses that exhibitions are different from conventions by locations, purposes, costs, and types of participants, noting that there are two groups who participate in exhibition events the visitors and the exhibitors, primarily attracted to the exhibit by the event organizers or facility marketers. In particular, exhibitions are regarded as a specific revenue source in the event tourism industry, generally requiring an explicit facility or space in order to attract and accommodate consumer groups who visit host cities. Consequently, events that are exhibit driven can contribute to stimulating local tourism businesses such as hotels, restaurants, transportation, and retail.

Three major groups have played a vital role in establishing the MICE industry 1) host cities/destinations; 2) attendees/visitors; and 3) associations/planners (Oppermann & Chon, 1997). This implies that most studies to date have been included in one of the groups. While the convention or meeting sector has been intensively studied from the viewpoint of those groups by numerous researchers, it is argued that the exhibition sector seems to have received little attention, particularly from the visitors' perspective (Jin *et al.*, 2013). This research paucity may result in limited understanding on the significant needs of exhibition visitors who contribute to improving local businesses and industry relations. Thus, the present study focuses on investigating event visitors who attended an exhibition event held in a medium-sized city in the southeastern region of US, in order to explore a greater understanding of the exhibition sector.

The primary objectives of the study were threefold: 1) to delineate the underlying dimensions of exhibition indicators; 2) to classify the dissimilar groups of exhibition visitors; and 3) to discover significant differences in the dimensions by the classified groups in the exhibition sector. The findings are expected to provide convention managers and exhibition planners with sound suggestions in order to meet the needs of the dissimilar groups of visitors and help achieve enhanced exhibition programs and convention facility management.

## LITERATURE REVIEW

The MICE industry has been viewed as part of planned events that are exclusively designed for specific purposes (Getz, 2008). Two main domains falling into the industry that are "business & trade" and "educational & scientific" (p. 404). While "business & trade" events contain meetings, conventions, exhibitions, consumer trade shows or fairs, "educational & scientific" events consist of conferences, seminars or clinics. The purpose of the event planned by organizers and interests of attendees determines which domain the event is classified, however, many previous research tends to treat the two domains as one general field.

A brief review of existing literature shows that most studies conducted in the MICE industry have addressed various and useful characteristics and behaviors from the perspectives of attendees/visitors and planners/organizers or both. Particularly, most works in the convention and exhibition sector seem to have been researched and segmented based on the following interests: (a) economic impacts (e.g., Braun, 1992; Grado, Strauss, & Load, 1998; Lee, Lee, & Yoon, 2013; Locke, 2010), (b) sustainable practices (Becken, 2002; Draper, Dawson, & Casey, 2011; Høyer & Naess, 2001; McCabe, 2012; Park & Boo, 2010; Sox, Benjamin, Carpenter, & Strick, 2013), (c) attractiveness/competitiveness (Boo, Koh, & Jones, 2008; Fenich, 2001; Clark & McCleary, 1995; Jin *et al.*, 2013; Kim, Yoon, & Kim, 2011; Rubalcaba-Bermejo & Cuadrado-Roura, 1995; Wan, 2011; Yoon, 2004), (d) site selections (Chacko & Fenich, 2000; Chen, 2006; Crouch & Louviere, 2000; Crouch & Ritchie, 1998; DiPietro, Breiter, Rompf, & Godlewska, 2008; Go & Zhang, 1997; Nelson & Rys, 2000; Weber & Chon, 2002), (e) demographics (e.g., Fawzy, 2009; Fenich, Scott-Halsell, Ogbeide, & Hashimoto, 2014; Lee & Lee, 2014; Lee & Min, 2013), (f) perceptions/image (Baloglu & Love, 2001; Chen, 2011; McCartney, 2008; Oppermann, 1996; Park, Wu, Shen, Morrison, & Kong, 2014), and (g) specific behaviors such as value (Lee & Min, 2013), quality (Jung, 2005), motivations (Lee & Lee, 2014), barriers (Sangpikul & Kim, 2009), and satisfaction (Tanford, Montgomery, & Nelson, 2012; Wei & Huang, 2013). The studies argue that conventions and exhibitions should be understood from diverse standpoints as a critical component that can connect visitors with host communities and influence fruitful destination management.

While the majority of those studies primarily stressed the significance of the convention sector, limited research dealt primarily with the exhibition sector alone or along with conventions. DiPietro *et al.* (2008) explored differences in destination selection criteria among meeting and exhibition planners. Through analyzing a total of 209 members of three international associations, the results revealed that the most important selection criteria were “exhibit space” for members of the International Association of Exhibitions and Events (IAEE), “perceived value for the money” for members the Meeting Professionals International (MPI), and “support services” for members of the Professional Convention Management Association (PCMA). A too low-response rate (5%), was pointed out as part of study limitations and the study was not designed for identifying exhibition visitors’ needs or expectations. Nevertheless, the findings suggest what exhibition managers need to ultimately provide to planners in order to enhance their experiences.

McCabe (2012) also highlighted the convention and exhibition market from the human resource perspective by interviewing senior managers working in convention and exhibition organizations in Australia. The interest of the study was to address employee turnover and shortage connected with employee retention and associated strategies. While the study did not incorporate the attendees’ perspective, the findings were considered vital to convention managers who were looking for controlling effective employee retention.

Jin *et al.* (2013) comprehensively evaluated destination attractiveness of nine trade exhibitions presented in major cities in Mainland China, revealing six factors: host city leadership in the industry, host city/region as a source of exhibitors, venue facilities, destination leisure environment, destination economic environment, and accessibility. Their study confirmed the significant roles of two types of cluster effects to exhibition destination attractiveness. However, the study was not designed for understanding the exhibition attendees' perspective. A similar but more inclusive study was conducted by Kim *et al.* (2011) who addressed the competitive positioning issue at five international convention cities in Asia, reporting that image and safety were significant concerns among the host destinations. As suggested by the findings, convention cities striving for growth and popularity were encouraged to optimally improve image and safety for attracting more international attendees. Consequently, their study provided a strong framework to figure out how to build competitive convention destinations.

Another comprehensive study was conducted by Lee *et al.* (2013) who measured the economic impacts of convention and exhibition businesses at an international event destination. Unlike prior studies, they surveyed four consumer groups that included convention attendees, exhibition visitors, convention and exhibition organizers, and exhibitors through applying a regional input-output model. Yet, the study did not examine how those groups in their overall experience at the event.

A review of studies associated with the MICE industry, specifically the exhibitions, indicates that few research has been conducted examining the exhibit visitor/attendee expectations or satisfaction. This means that there has been a paucity of empirical research on identifying dissimilar groups of exhibition visitors in the current convention and exhibition sector.

## METHODS

### *NASCAR Hall of Fame Exhibition*

The NASCAR Hall of Fame is owned by the City of Charlotte, licensed by NASCAR and operated by the Charlotte Regional Visitors Authority (CRVA). It is adjacent to the Charlotte Convention Center, and is 150,000 square feet, providing visitors with educating and entertaining experiences along with artifacts, exhibits, museum, and an art theater. The space was built in May, 2010 to honor national NASCAR members such as racers, crew members, team members and others. The Hall of Fame offers five main events that include Great Hall "Rocking & Racing", Glory Road, Hall of Honor, Race Week, and Heritage Speedway ([www.nascarehall.com](http://www.nascarehall.com)). Each event is designed for different purposes. For examples, the "Rocking & Racing" exhibit located in the Great Hall displays the good vibrations that have complemented NASCAR over the last five decades, welcoming all genres of music (e.g., rock stars, country crooners, rappers). The exhibit highlights four primary areas of interest that include "Racers Who Rock," "Rockers Who Race," "Rocking the Track" and "NASCAR in Song" along with more than 40 artifacts. The "Glory Road" exhibit, encircling the Great Hall, displays 18 historic cars that tell the story of NASCAR, including the six generations of NASCAR premier series race cars that have been driven and built by drivers, owners and

mechanics. Recently, a newly updated event, “the Champions exhibit”, has been added by displaying the fire suits and helmets of the winners of three NASCAR’s national touring series: the 2013 NASCAR Sprint Cup Series champion Jimmie Johnson, the 2013 NASCAR Nationwide Series champion Austin Dillon, and 2013 NASCAR Camping World Series champion Matt Crafton. The NASCAR Hall of Fame also has 40,000 square foot ballroom called the “Crown Ballroom” that is used for additional space for private events.

### *Online Survey Instrument*

The online questionnaire was administered by the Charlotte Regional Visitors Authority (CRVA) consisted of five main sections. All of the questions were pilot-tested and efficiently modified to maximize participation in the survey. The first section collected information about various aspects of exhibits (eight indicators) that included presentation, interactive experience, great hall, glory road, hall of honor, race week, heritage speedway, and overall quality of exhibits using a five-point Likert-type scale ranging from ‘1 = Poor’ to ‘5 = Excellent’. Using the same scaling method, the second section collected information about the facility (seven indicators, e.g., parking, cleanliness), interactions with admission and floor staff (six indicators, e.g., friendliness, knowledge, communication), and concessions (four indicators, e.g., menu choices, food quality, overall value, and staff). In section three, respondents were asked to indicate the specific types of information sources used for attending the exhibition event, including newspaper, TV, email, radio, magazine, billboard, websites, friends/relatives, social media, and others. Trip characteristics such as purpose of the visit, past experience, length of stay, travel party, and total spending were then collected in the fourth section. Lastly, satisfaction with the value of the exhibition and the experience as well as future intentions (recommendation to others and revisit intentions) were measured using a five-point Likert-type scale ranging from ‘1 = completely disagree’ to ‘5 = completely agree’.

The questionnaire indicators were initially developed by the marketing team members of the CRVA based on related-websites and other marketing organizations such as CVBs and DMOs. Those indicators were then shortly pre-tested on clients who purchased exhibition tickets to reduce measurement inaccuracy. A few modifications were adjusted to the survey instrument.

### *Data Collection and Analysis*

Potential respondents who attended the exhibition event were first identified and asked to provide their primary email addresses for future contacts. Respondents who voluntarily provided email addresses were then contacted monthly through invitation emails to ask if they would participate in an online survey. Only those who agreed to participate in the survey were encouraged to click on the web link. Two follow-up reminder emails at an interval of two weeks were sent to those who showed no response per month. As a result, a total of 5,231 usable responses were collected during the months from March 2014 to December 2014. However, the response rate was not provided by the organization.

Descriptive analysis was first run to profile the respondents who attended the exhibition event by employing SPSS 22.0. Principal components factor analysis (EFA) was then performed to delineate the appropriate number of dimensions of exhibition indicators, followed by K-means cluster analysis to classify distinctive groups of exhibition visitors. The groups were further validated through Multivariate Analysis of Variance (MANOVA) and discriminant analysis. Lastly, the chi-square statistic was performed to discover differences in demographic and trip characteristics across the cluster.

## RESULTS

### *Sample Profile*

Table 1 represents the profile of the exhibition visitors. 53% of the visitors were female and the age of them was widely distributed, ranging from under 21 years to over 70 years. The biggest group of the visitors was 50 to 59 years (24%), followed by 40 to 49 years (19%), 60 to 69 years (16%), and 30 to 39 years (11%). With respect to generation based on the age range, Baby Boomer consisted of approximately 39%, X-group (25%), Y-group (16%), and other (5%). Regarding past experience and residency, the majority of them were first-time visitors (83%) and out of state visitors (60%), respectively. Over 55% of them were overnight visitors and 49% traveled with one or two persons, followed by three to four (13%) and alone (13%). In their total spending, 14% of them spent \$1,000 or over, \$100 to \$299 (13%), \$500 to \$999 (13%), \$300 to \$499 (9%), and under \$100 (4%).

**Table 1 Profile of the Exhibition Visitors (n = 5,231)**

Characteristics	<i>n</i>	Percent (%)
Gender		
Male	1,625	31.1
Female	2,783	53.2
Age		
Under 21 years	246	4.7
21 to 24 years	117	2.2
25 to 29 years	186	3.6
30 to 39 years	570	10.9
40 to 49 years	996	19.0
50 to 59 years	1,270	24.3
60 to 69 years	815	15.6
70 and over	208	4.0
Generation		
Y group (under 34)	809	15.5
X group (34-49)	1,306	25.0
Baby Boomer (50-68)	2,032	38.8
Other (69 and over)	261	5.0
Past experience		
First-time visitors	4,343	83.0
Repeat visitors	541	10.3
Residency		
Instate (NC)	1,258	24.0
Out of state(Non-NC)	3,150	60.2
Type of trip		
Day	1,421	27.2
Overnight	2,897	55.4
Travel party		
Myself	672	12.8
1 to 2	2,561	49.0
3 to 4	681	13.0
5 and over	155	3.0
Total spending		
Under \$100	223	4.3
\$100 to \$299	659	12.6
\$300 to \$499	493	9.4
\$500 to \$999	653	12.5
\$1,000 and over	712	13.6

*Note:* Sum may not be 100% due to some missing values

**Table 2 Results of Principal Components Factor Analysis on Exhibition Indicators**

Exhibition dimensions / indicators	Factor loadings	Eigen-values	Explained variance	Reliability values	Composite mean
Exhibits		11.22	44.89%	0.91	4.71
Overall quality of exhibits	0.79				
Heritage Speedway	0.78				
Race Week	0.74				
Hall of Honor	0.72				
Presentation	0.70				
Glory Road	0.70				
Great Hall	0.69				
Interactive experience	0.60				
Staff		2.13	8.50%	0.91	4.79
Floor staff communication	0.81				
Floor staff knowledge	0.80				
Admission staff communication	0.79				
Admission staff knowledge	0.78				
Floor staff friendliness	0.78				
Admission staff friendliness	0.74				
Facility cleanliness	0.40				
Facility		2.05	8.19%	0.91	4.42
Ease of entry	0.79				
Parking deck	0.75				
Parking staff	0.74				
Directional signage	0.66				
Admissions experience	0.62				
On-site ticketing experience	0.62				
Concessions		1.46	5.83%	0.91	4.05
Food quality	0.89				
Overall value	0.87				
Menu choices	0.86				
Staff service	0.60				
Total			67.41%		

Scale: 1 = Poor, 5 = Excellent. Varimax rotation with Kaiser Normalization

*Principal Component Factor Analysis and Reliability Test*

It was necessary to perform principal components factor analysis on a total of 25 exhibition indicators using Varimax rotation with Kaiser Normalization to delineate underlying dimensions. The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy confirmed that the 25 indicator sample was satisfactory for factor analysis (KMO

measure = 0.94). Analysis suggested four appropriate dimensions with eigenvalues 1.0 or over and factor loadings 0.40 or over, indicating that all indicators satisfied the minimum requirement for loading values (i.e. > 0.40) (Hair *et al.*, 1998). These dimensions were then labeled as “exhibits”, “staff”, “facility”, and “concessions”, accounting for 67.41% of the total variance. A reliability test was run to assess whether the internal consistency of the exhibition indicators on each dimension was highly reliable, suggesting all dimensions were found to be internally consistent along with reliability coefficients 0.91 (Table 2).

### *Cluster Analysis*

K-means cluster analysis known as less sensitive to outliers and more appropriate to large samples rather than other cluster methods (Hair *et al.*, 1998) was employed to classify dissimilar groups of exhibition visitors linked with 25 indicators. Several possible cluster solutions from three to five were initially tested to determine the final number of clusters by using the K-means cluster method. As a result, four clusters were proposed and found to be 922 (Cluster 1), 670 (Cluster 2), 3,087 (Cluster 3), and 552 (Cluster 4) along with no extreme outliers observed. The first cluster accounted for 18% of respondents, the second cluster for 13%, the third cluster for 59%, and the fourth cluster for 10%. Respondents were then named as “nostalgics (cluster 1),” “service focused (cluster 2),” “venue aesthetic (cluster 3),” and “ancillary areas (cluster 4)” based on the patterns of the mean scores in the exhibition dimensions.

### *Multivariate Analysis of Variance (MANOVA) and Discriminant Analysis*

As the next step, Multivariate Analysis of Variance (MANOVA) and discriminant analysis were further applied to determine the validity of the four clusters identified. MANOVA was tested to determine significant differences in the exhibition dimensions across the four clusters. During this analysis, the exhibition dimensions based on a composite mean of each dimension were treated as the dependent variables and the clusters were treated as the independent variable. Discriminant analysis was then performed on the four clusters by the exhibition dimensions. During this analysis, the exhibition dimensions were treated as the independent variables and the four clusters were treated as the dependent variable.

**Table 3: Results of Between-Subject Effects for Exhibition Dimensions by Four Clusters**

Exhibition dimensions by four clusters	Sum of Squares	<i>df</i>	Mean Square	<i>F</i>	<i>P</i>
Exhibits	268.51	3	89.50	851.12	<b>0.000</b>
Staff	390.39	3	130.13	1316.01	<b>0.000</b>
Facility	752.80	3	250.93	1177.09	<b>0.000</b>
Concessions	488.91	3	162.97	271.14	<b>0.000</b>

Scale: 1 =Poor, 5 = Excellent. A single ‘composite mean’ score was used for each dimension

The overall result of MANOVA processes suggested significant mean differences in the dimension [Wilks' Lambda  $F = 845.76$ ,  $df = 12$ ,  $p = 0.000$ ] across the clusters. Specifically, Table 3 represents the significant results of between-subject effects for the exhibition dimensions by the four clusters identified. All of the dimensions were found to be statistically significant across the four clusters: “exhibits” ( $F(3, 2,719) = 851.12$ ,  $p < 0.001$ ), “staff” ( $F(3, 2,719) = 1,316.01$   $p < 0.001$ ), “facility” ( $F(3, 2,719) = 1,177.09$ ,  $p < 0.001$ ), and “concessions” ( $F(3, 2,719) = 271.14$ ,  $p < 0.001$ ). Correspondingly, the mean scores of each dimension across the four clusters were presented in Table 4, indicating different exhibition experiences of respondents. For example, Cluster 3 had the highest means scores on all dimensions, followed by Cluster 1, Cluster 2 (except for facility), and Cluster 4 (except for exhibits and facility).

**Table 4: Mean Differences in the Exhibition Dimensions by Four Clusters**

Exhibition dimensions	Cluster 1	Cluster 2	Cluster 3	Cluster 4
	( <i>n</i> =922) Mean	( <i>n</i> =670) Mean	( <i>n</i> =3,087) Mean	( <i>n</i> =552) Mean
Exhibits	4.73	3.99	4.91	4.41
Staff	4.90	4.68	4.96	3.81
Facility	3.71	4.14	4.84	3.73
Concessions	3.79	3.52	4.37	3.25
<i>Total</i>	4.28	4.08	4.77	3.80

Scale: 1 =Poor, 5 = Excellent. A single ‘composite mean’ score was used for each dimension.

To further validate the four clusters, discriminant analysis was performed and revealed significant differences in the clusters by the exhibition dimensions [Wilks’ lambda = 0.09,  $\chi^2(12) = 6,329.35$ ,  $p < 0.001$ ; Wilks’ lambda = 0.25,  $\chi^2(6) = 3,743.86$ ,  $p < 0.001$ ; Wilks’ lambda = 0.53,  $\chi^2(2) = 1,707.29$ ,  $p < 0.001$ ] for three functions. As

presented in Table 5, 90.3% of respondents in Cluster 1 ( $n = 922$ ) were correctly assigned, leaving 9.7% misallocated. In Cluster 2 ( $n = 670$ ), 87.6% of those were correctly classified, leaving 12.4% misclassified. In Cluster 3 ( $n = 3,087$ ), 95.2% of those were correctly classified, leaving only 4.8% misallocated. Likewise, 91.3% of those in Cluster 4 ( $n = 552$ ) were correctly classified, leaving 8.7% misclassified. Thus, overall 93.0% of the total cases were correctly assigned to the four groups based on the exhibition dimensions.

The exhibition visitors' overall satisfaction with the experience and future intentions were additionally explored to find out significant mean differences across the clusters (Table 6). MANOVA suggested significant mean differences in their overall satisfaction [ $F = 1,867.32, p = 0.000$ ], likeliness to attend another event in the future [ $F = 1,151.92, p = 0.000$ ], and recommendation to friends/relatives [ $F = 1,231.10, p = 0.000$ ] across the clusters.

**Table 5 Results of Discriminant Analysis for Validating Four Clusters**

Cluster case	Predicted group membership				Total
	1	2	3	4	
Count					
1	<b>833</b>	27	37	25	922
2	25	<b>587</b>	10	48	670
3	91	44	<b>2,940</b>	12	3,087
4	26	27	37	<b>504</b>	552
Percentage					
1	<b>90.3</b>	2.9	4.0	2.7	100.0
2	3.7	<b>87.6</b>	1.5	7.2	100.0
3	2.9	1.4	<b>95.2</b>	.4	100.0
4	4.7	1.3	2.7	<b>91.3</b>	100.0

Note: 93.0% of original grouped cases (N=5,231) were correctly classified

**Table 6: Significant Mean Differences in Overall Satisfaction and Future Intentions across Four Clusters**

Variables	Cluster1 (n=922)	Cluster2 (n=670)	Cluster3 (n=3,087)	Cluster4 (n=552)	<i>F</i>	<i>p</i>
	Mean	Mean	Mean	Mean		
Satisfaction	3.05	4.47	4.85	3.71	1,867.32	0.000
Attend another event	3.62	4.50	4.88	3.87	1,151.92	0.000
Recommend an event to friends/relatives	3.51	4.42	4.86	3.77	1,231.10	0.000
<i>Total Means</i>	<i>3.39</i>	<i>4.46</i>	<i>4.87</i>	<i>3.78</i>		

Scale: 1 = Poor, 5 = Excellent

## CONCLUSIONS AND IMPLICATIONS

Based on four underlying dimensions identified from the exhibition indicators and four dissimilar groups of exhibition visitors classified, the present study concludes that there are substantial differences in the exhibition dimensions, visitors' satisfaction, and their future intentions across the four clusters inside the convention and exhibition sector. Given the growing trend of convention and exhibition events at domestic and international host destinations, the findings will contribute to the literature of the sector by suggesting the following implications.

For new sports venues, like the NASACR Hall of Fame, and particularly those that are positioned as year-round tourist attractions, borrowing sports heritage from other hall of fames will be intricate in sustaining visitors. The implications go beyond just the venue. Other tourist attractions, sites, and experiences may benefit from these visitors, both as a way to establish their own credentials as well as create a popular product that appeal to visitors as well. Such connections may well convert the indifferent visitor into a loyal fan and, as a consequence, positively affect future patronage

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# USING EXPERIENCE SAMPLING METHOD (ESM) TO INVESTIGATE STUDY ABROAD IN IN HOSPITALITY.

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## ABSTRACT

*Universities are increasingly required to provide evidence of learning effectiveness. For students participating in study abroad, traditionally this has been challenging. As numbers of students participating in study abroad continues to grow, suitable effective research methodologies need to be investigated. This research considers the potential role of Experience Sampling Method, as a tool for researching the experiences students undergo during periods abroad. This research suggests that considering alternative research methodologies may allow rich meaningful data to be collected on this important element of the student experience.*

**KEY WORDS:** Words: Study abroad, experiential learning, qualitative research, ESM

## INTRODUCTION

Universities face increasing pressure to provide evidence they are viewed as ‘value added’ by the myriad stakeholders involved (Crawford, 2014). For many students participating in study abroad is an important component of the university experience. Indeed the US senate issued a resolution raising awareness and increasing the number of U.S. students studying abroad. The resolution stated, “Ensuring that the citizens of the United States are globally literate is the responsibility of the educational systems” (ISA, 2014). It is estimated that as many as 300,000 US students participate in study abroad, during their undergraduate studies (Institute of International Education, 2014). This research seeks to investigate how students interpret experiences they encounter whilst on study abroad. Extensive research has sought to investigate the student experience during this educational activity (Glossari, 2010; Sage, 2009). Typically methods such as surveys and other forms of quantitative research have been employed. Whilst such research is of value in understanding the student experience, its quantitative nature limits rich analysis. This research seeks to identify the value of utilizing a qualitative research method in order to interpret the student experience. It is anticipated that such a methodology may offer the researcher rich, complex and more varied data.

## LITERATURE REVIEW

Each year more than 300,000 US students participate in study abroad, and numbers continue to climb, having doubled over the last decade (IIE, 2014). Popular destinations remain English-speaking countries, with the UK, Australia and Ireland in the top ten destinations, along with Italy, Spain, France, and Germany. The reason for this

seems to be that less than 10% of students studying abroad are foreign language majors. A greater number of students major in social sciences, business, humanities, arts and sciences. The majority study for eight weeks or less, either as a term abroad, or sometime during the summer. Thus, while more students are studying abroad, they are doing so for shorter time periods (IIE, 2014).

Most universities cite the benefits of study abroad on their web-sites. These are assumed to include;

- Personal Development: Increased self-confidence, a catalyst for increased maturity, impacting on world view
- Academic Commitment: Enhanced interest in academic study, influence over subsequent educational experiences, reinforcing a commitment to foreign language study
- Intercultural Development: Helping to better understand our own cultural values and biases, Influencing the acceptance of diversity, influencing interactions with people from different cultures
- Career development: Acquiring skill sets that influence career paths, developing interests in alternative careers
- 

Where research has taken place as to the student experience of study abroad, it is heavily quantitative, relying on post-experience surveys. Despite recent advances in acceptance of the role qualitative research has to play, quantitative measures are still often judged to be of greater value (Hansen and Grimmer, 2007). Research tends towards a positivist perspective which asserts that an objective reality exists and can be determined using objectively correct scientific methods (Long et al., 2000; Carson et al., 2001; Neuman, 2003). This is the traditional approach of the physical sciences, adopted by established social sciences such as psychology and economics. Concepts such as reliability, validity and statistical significance are common in positivist research, with the purpose of describing aspects of 'reality' with certainty. Within such a perspective the assumption is that it is possible to determine the extent to which reality has been described (Cohen, 1992; McClelland et al, 2003; Nancarrow et al., 2001).

Qualitative research by comparison, is relativist in nature, seeking insight to describe complexity; and rejecting objectivity, in favour of individual understanding of particular viewpoints (Long et al., 2000; Roy, 2001; Carson et al., 2001; Neuman, 2003). This suggests that knowledge in any field is provisional, politically constructed and contested.

The question this raises is, does this emphasis on the quantitative manifest itself within the experiential field? And the answer would appear to be that it does. Study abroad research is dominated by the positivist end of the spectrum, with quantitative research putting forward numerical representations of the key issues (Hansen and Grimmer, 2007). As Kahneman and Krueger argue "The most direct approach to the measurement of experience would avoid effects of judgment and of memory as much as possible" (2006, p.9). A number of quasi-quantitative techniques have been used in an attempt to measure the effects of experience. It is claimed that these more scientific

experiments have the advantage of effectively controlling extraneous aspects of an experience, allowing the unique effect of a stimulus on individuals' experiences to be evaluated. Typically, participants are required to undergo an experience, whilst providing a real-time indication of its hedonic quality by manipulating levers controlling markers or continuously adjusting a dial. It is argued that such studies yield a profile of subjective experiences, providing insights into more standard measurement techniques. It also lends support for the usefulness of making a distinction between experienced utility and remembered utility; the way people experience in real-time and the way they remember experiences after they are over (Kahneman & Krueger, 2006). Many researchers conclude that experiences can be plausibly measured in real time and that retrospective assessments are not a good measure of experiences (Kahneman & Kruger, 2006).

A number of researchers have commented on the assumption that controlling variables, allows the accurate reflection of experiences (Lucas et al., 1996; Kahneman et al., 2004; Urry et al., 2004). These argue that uncontrollable variables such as mood, happiness, perceptions of wealth, even the weather on the day, can all affect participant's responses, with the conclusion that these more scientific methodologies are no more 'controlled' than after the event recall measures.

A further problem with attempts to quantitatively equate responses to experiences is that participants may interpret response categories differently. If a respondent states they are 'very satisfied' whilst another states they are 'satisfied', it is not evidence one participant is more satisfied than another. It is possible that some participants rarely use superlatives, whilst others tend towards extremes. Even when researchers anchor responses to words having common, shared meaning, there is no guarantee respondents use scales comparably. It can be legitimately argued that interpretations of the numeric values attached to responses are largely invalid (Kahneman et al., 2004).

Questions have to be asked as to the appropriateness of quantitative tools for evaluating study abroad. The issues highlighted above demonstrate that quantitative tools, even ones using multiple scales for measuring underlying constructs, may be inadequate (Palmer, 2010; Eunkyu et al., 2000). As a result many researchers conclude qualitative techniques are the only way to investigate experiences.

One methodology which may offer a way in which to explore the experiences of students on study abroad is Experience Sample Method (ESM). ESM methods are proposed here because; they demonstrate the link between stimulus or environment and response, they take place in naturalistic settings, they investigate how emotions occur simultaneously and combine and they avoid memory bias and the use of global heuristics. A number of ESM methods are available and have been used to investigate experiences; including Interval contingent research (participants complete reports at designated intervals); ISTEEL software (participants complete logs using pull-down lists, Cutler et al., 2011); Event contingent research (participants report on designated events, Chhetri et al., 2004); Signal contingent research (participants complete reports when prompted by random signals, Borrie & Roggenbuck, 2001; Fave et al., 2003); Ecological Momentary Assessment (EMA) (a collection of methods concerned with aspects of the environment

that give rise to subjective experiences, Yi, 2012); Thought sampling (Lee et al., 1994); Day Reconstruction Method (diary information collected for the preceding day, Nawijn, 2010); and Immediate Visual Experience (uses photo evidence to demonstrate responses, Shoval & Isaacson, 2007). It is possible that the use of ESM methodology may result in a greater understanding of the study abroad experience, from the perspective of the participants undergoing the experience.

## RESEARCH METHODS

This research was undertaken during consecutive 30 day study abroad programs in South Africa. Participants were students studying hospitality degree programs, representing four campuses. There were forty-six participants in total; all but two female and ranging in age from nineteen to twenty-four. Their previous experience of overseas travel varied, ranging from never having left the U.S.A., to having travelled extensively, however none of the students had previously visited Africa.

The research used a form of ESM, a modified Immediate Visual Experience, using photo evidence (Shoval & Isaacson, 2007). ESM is referred to as a disguised-unstructured technique, as participants are unaware of what is being measured, and the unstructured nature of the tasks, means that response alternatives are not limited by the researcher (Klopper & Taulbee, 1976). The aim is to identify mechanisms which evaluate emotional response and engagement. The focus is on identifying which elements of a study abroad experience participants engage with (Jones, et al, 2008). The research used a combination of immediate visual experience and thought sampling forms of experiential methods. Participants were asked to photograph moments which demonstrated memorable significant meaningful experiences, and to reflect on them in text (Bolger et al., 2003). A briefing session was held in order to explain what comprised such experiences; however this form of research relies on participants defining significant emotional experiences for themselves (Shoval & Isaacson, 2007). During downtime, participants reflected on their emotional responses the images displayed. Participants were not required to complete a specified number of images and responses per day, simply to capture experiences which elicited significant emotions. ESM is a valuable methodology when reporting experiences which are less susceptible to memory bias. Such a method however, allows for bias, as responses do not represent spontaneous content in the stream of consciousness. This bias is encouraged by the time separation between the photographs being taken and reflection taking place. The effect of this gap in the stream of consciousness was minimised as participants were encouraged to complete reflections daily. The photographs, with accompanying text, were uploaded to an on-line repository daily, within the logistical constraints of studying in Africa.

The question of remuneration was considered, given the taxing nature of participation in this research. Remuneration had to be sufficient to encourage cooperation, without being coercive. Given the status of the participants, college credit was used. Whilst the offer of college credit is not be substantive, it is an inducement. In order to ensure that the research was conducted ethically, participants were informed they would be offered credit in recognition of their participation, however no specifics as to

the substantive nature of this credit were given. This minimized its potential significance in the mind of participants and thus any potential bias.

In terms of a sampling protocol, decisions had to be made as to the research sample and frequency. These decisions are based on the rarity of experiences, the more common the experience, the more value in sampling throughout the day. As this research is qualitative and conceptual in nature, it does not seek to derive statistical inferences from the data. The sample frame used is purposively selected in order to allow exploration of the concepts being investigated. Purposive sampling, or selective sampling, relies on the judgment of the researcher (Barbour, 2001; Ritchie and Lewis, 2003). The main goal of purposive sampling is to focus on particular characteristics of a population that are of interest and which best answer the research questions. Within this research the sample of people being interviewed is not representative; however lack of representativeness is not a weakness, but a considered choice (Ritchie & Lewis, 2003). Within this research the sample used is 'expert elicitation' (Polkinghorne, 2005). Expert sampling is appropriate when research seeks to gain knowledge from individuals having specific expertise. In addition it is useful where empirical evidence is lacking amid high levels of uncertainty (Hedges and Waddington, 2003). This form of sampling was appropriate as it is a simple methodology, few rules are involved, and it is time and cost effective.

The main purpose of sampling is to reduce the need for empirical operations, which raises the question how large does a sample have to be? A key factor is the understanding that a non-probability sample is inherently biased. If a sample is biased, it does not help to increase the sample size as the added sample will be similarly biased (Hedges & Waddington, 2003). ESM represents a population of experiences, as such data has to be collected on enough occasions and with enough frequency to ensure it is representative of the phenomena under investigation (Wheeler & Reis, 1991). With regard to the frequency experiences should be reported, some guidelines have emerged which suggest that no more than 5-6 occasions should be sampled on any given day (Delespaul, 2006). In addition, research suggests that the longer the reflections are, the fewer the frequency should be (Reis & Gable, 2001).

The purpose of the sample was to generalize from the results, suggesting the results are true not only of the sample, but the population in general. This raises the question, is it possible to evaluate the credibility of such a declaration? Within purposive sampling this is answered by considering the extent to which the sample deviates from the population in relevant issues, with relevance being determined through reference to the original research objectives.

ESM produces large volumes of data which has to be organised for analysis (Luke, 2004). A decision has to be made as to whether to manipulate the data manually, or use available software (Bolger & Kashey, 2002). Given the sample population and frequency, the data was manipulated manually. Emergent coding and affinity diagrams were used to analyse the responses, with data grouped according to similarities and emergent themes. In order to undertake the affinity diagrams, three individuals

categorised the completed sentences based on arising topics. It was possible for participants to have more than one response item in one sentence. If this occurred each of the items was classified under a category derived directly from respondents' answers. The categories were discussed and evaluated, categories determined, further evaluated and analysed and confirmed.

A thematic framework was developed, derived from the research objectives. In addition, a detailed index of the data was undertaken, mapping the data according to the thematic framework. The mapping and interpretation of the data was done under the auspices of the original research objectives, in conjunction with themes that emerged from the data.

## RESULTS

A total of 4140 responses were logged during the course of the research, equating to an average of sixty-nine responses per day, or three responses per participant. Within these averages there were significant variances, some participants logged more responses than others. In addition, certain occasions encouraged greater emotional response than others, leading to variance within the daily averages. The coding process was used to develop constructs and elements, which were then conceptualised into broad themes and sub-themes (Elliott & Gillie, 1998; Marshall, 1999). Most inductive studies report between three and eight categories in the findings (Campbell et al, 2003). Where more categories than this are reported, it is likely that researchers have not finished combining smaller categories into more encompassing categories, or have not determined which categories are the most important (Jain & Ogden, 1999). Within this research six themes were identified:

- i. Cultural differences
- ii. Perceptions, values, norms and beliefs
- iii. Physiological states and emotions
- iv. Academic learning
- v. Competencies & abilities
- vi. Social factors

### Cultural differences

A number of the images reflected on the cultural differences respondents perceived they experienced. Images were produced highlighting differences in languages (South Africa has eleven national languages, including the white languages of English and Afrikaans, along with tribal languages). For many respondents language usage reinforced positive senses such as the exotic nature of travel, whilst also reinforcing a sense of isolation. Commenting on the language issues, Respondent 11 for example, used an image of a student group with very limited English language skills, stating "Language barriers make communication difficult and I feel like an outsider". This sense of isolation was repeated by Respondent 22 who reflected "It is often a struggle to understand local customs and complete simple tasks" (alongside an image of an ATM she had struggled to withdraw cash from).

Images of food were often used as indicative of the vast cultural differences respondents were experiencing. When used, the images tended to be extreme, for example a number of images of ‘smileys’, boiled cows heads sold on open tables in local markets were offered (Respondents 13, 18 and 24). Appearance was another image often reflected on by the students. It was quickly apparent to respondents that despite their best efforts, they did not appear ‘native’. Their clothes, hair, and accessories stamped them as different. A number of the participants images demonstrated this phenomenon, reflecting for example, on the tendency that locals had for touching their hair (Respondents 21 and 36), or borrowing their sunglasses (Respondent 14).

As the trip progressed students became frustrated with some of the cultural differences they experienced, with images reflecting the growing sense of frustration; such as bank opening hours, laundry facilities, store hours, the lack of commodities they were used to being able to buy. This is summed up by Respondent 40 who stated “The newness that I found exciting when I arrived; is now just frustrating” (reflecting on an image of a bank closed on a South African public holiday she was unaware of). Activities which were viewed as routine in the USA, but were perceived as less safe in Cape Town were also sources of frustration “I miss being able to just run, and exercise in safety” (Respondent 27, reflecting on an image of students trying to exercise in a small courtyard).

An interesting element within the culture images and reflections was a sense of authenticity and a quest amongst the participants for a sense of the ‘real’ Africa. A number of images were offered which commented on experiences they had which they did not consider authentic or reflecting their sense of what Africa was (The Victoria & Albert waterfront, Stellenbosch and the wine regions, Downtown Cape Town and the international conference centre). For many students the trip to Green Market square (a local open air square with stalls) represented their first experience of the ‘real’ Africa, i.e. haggling with merchants, a predominately non-white population, foods which were often unrecognizable and non-English as the language being used. This sense of inauthenticity was summed up for many by the evening spent at the ‘Africa Café’, which for a number of students “was great fun, but not very real” (Respondent 28); “the evening was spoiled when the server said she was a psychology major at CTU, and wore a different countries costume each night, and the managers make them paint their faces!” (Respondent 31). In a similar way a number of students used images to reflect on the difference between the ‘real’ game drives they took at the Sabi Sands research centre and the ‘touristy’ ones they experienced at the luxury game lodges.

#### Perceptions, values, norms and beliefs

Respondents routinely offered images which demonstrated reflections on the way of life they were experiencing and the ways in which this was changing their own worldview; “load-shedding!!!!” (Respondent 26, over an image of everyone eating by torchlight because South Africa does not have sufficient electricity at all times); “this image is just too sad”, (Respondent 26, over an image of children at a water standpipe); “the inequality can be shocking” (Respondent 11, on a pair of images which compared \$100,000,000 houses in Cape Town, with shanty properties in Kyleshie); “I was

reminded of the south in the 1960's" (Respondent 35, on an image of a picture of a 'whites only' sign on a bench); "I had seen it [Mandela's prison cell] in the film, but to hear about it from someone who was there brought the injustices home to me" (Respondent 14, on an image of Robben Island); "it is so hard to have to accept and comprehend both sides of the argument" (Respondent 25, on an image of a guest lecture on poaching). As the program of study progressed, the images and reflections demonstrated a less biased perspective toward other cultures and peoples. Where at first many of the images and reflections were comparative, i.e. negatively comparing life in South Africa with that in the USA, they later became more balanced, recognising that the host country may have positive elements that the USA could usefully incorporate. "hygiene here is primitive, I'm not sure about what is safe to eat and drink" (Respondent 18, on an image of food stalls in a local market, in week one); "we could learn a lot from here" (same respondent over an image of non-flushing toilets", in week three). Typical amongst these images were those of: the extensive and effective ways in which South Africa focusses on sustainability and the environment (images of non-flushing toilets, recycling bins, the pod that carries waste from Table Mountain each day); the role of extended family in South Africa (images and reflections of grandmothers with small children and large family groups at recreation); the role sporting activities played as a community development activity throughout South African society (multiple images of crowds at the rugby and football matches attended); and the sense of nationship demonstrated "this image sums up for me how proud people are to be South African" (Participant 18, reflecting on an image of a bar at the rugby stadium). These reflections and images reinforced a sense that the participants were outsiders looking in on a foreign culture.

### Physiological states and emotions

A number of images were offered which reflected upon the internal feelings of the participants. Almost all of the reflections began with an image of either the airplane they were leaving on; or a map of the world with the distance highlighted. As Respondent 15 commented "As I was getting on the plane, it didn't even feel real", a sentiment supported by many of the other students sampled "It hit me that I was actually about to head off to a foreign country all on my own" (Respondent 11); "It wasn't until I found myself on the plane that the reality of what I was about to do really hit me; and I began to panic" (Respondent 36).

Images were extensively used to reflect on the student's emotions and feelings during the trip. Many expressed a state of nervousness, backed by excitement at the month ahead "I had no idea what I was expecting, I had theories and ideas floating around in my mind about what things would be like; but it all felt so distant (Respondent 18, reflecting on an image of the itinerary for the trip).

Throughout the trip images were used to support the emotion of homesickness, with respondents using multiple forms of image, for example; those which referenced distance to home, "the USA seems like a long way away"(Respondent 33, reflecting on an image of a distance signpost at Cape Point), those that reflected on a psychological sense of distance "Homesickness seems to have started for some people, they are

spending a lot more time talking to people at home, often reassuring their boyfriends” (Respondent 9, reflecting on an image of people sitting Facetiming from a hotel lobby). For many students these images predominately occurred during the latter stages of week two, and were largely absent by week three. For a very small number of respondents however, the homesickness continued to the end of the program, as shared by Respondent 14, who offered a picture of her almost packed luggage and reflected “I’m ready to leave and have begun to plan my return”.

For many other students however, the opposite emotions are generated. These students become assimilated to the trip and each experience bonds them closer to the host country and the student group “I’m sort of a mess, I don’t know what to do with myself or how to spend my last precious days and nights here, I don’t want to think about having to leave” (Respondent 34, over an image of mementoes of some of the activities she had undertaken); “I can’t believe we are starting the last part of the trip, I want it to begin again” (Respondent 35, reflecting on an image of the hotel in Johannesburg).

Images which demonstrated the way in which activities impacted on the groups emotions were also commonly reflected upon. A number of students used images of their attendance at sports activities to demonstrate their excitement “Watching the Springboks play at Newlands, can’t begin to explain how excited I am” (respondent 9), “It’s unreal, I’m in the 2010 world cup stadium watching Bafana Bafana play!!!!”, (Respondent 28). In a similar way students used images which reflected a sense of nervous excitement “The sharks were huge, it was scary, but everyone wanted to do it” (Respondent 35, reflecting on an image of shark cage diving); “I have to be honest, I may have pee’d myself a little (Respondent 34, over an image of paragliding in Cape Town); and “I was very scared, the lions were so close and the truck had no sides” (Respondent 36, on an image of a lion pride on safari). Strong emotions were also reflected on when students were taken out of their comfort zones, “I refused to take images of the shanty town tour, it seemed like we viewed the people as animals in a zoo” (Respondent 28, on an image of the coach parked at a shanty town); “I couldn’t believe we were being asked to do this, its poop!” (Respondent 40, over an image of students holding animal faeces to discuss tracking signs); “I just couldn’t eat this, it just seems wrong” (Respondent 7, and an image of dried Ostrich snacks).

### Academic Learning

Despite the experiential nature of study abroad, participants were able to provide images and reflections which demonstrated their intent to use the trip as an academic opportunity. Typically respondents reflected on their efforts to embrace new concepts presented during the more academic elements of the trip “this was an image used by Susan during her session, it reflects for me a new way of thinking about business and social responsibility” (Respondent 15). In addition they made reference to valuable global knowledge they were acquiring, knowledge they felt would empower them to better understand themselves and others, “it is important to compare and contrast the way sport is viewed here, with that of the USA” (Respondent 34, over an image of CTU’s sports fields). References were made to the ideas and perspectives about themselves and their

culture, which were provided by the many guest presenters they encountered during the course of the trip. The reflections made clear that many of the participants had been challenged to reconsider their own beliefs and values, as a result of the presentations given during the study trip. Foremost amongst these were: the concept of sport as a unifying factor in society (images of Newlands and Green point stadium); the complexities inherent in democracy in Africa (images of the presentation about the election); issues of leadership (images of Mandela and Desmond Tutu); the role of tourism in the economy (images of iconic Cape Town tourism); sustainability and the environment (images of the game reserves) and a cultural awareness of leisure and recreation (images of sport, picnicking, barbequing and local markets).

### Competencies & abilities

A number of participants offered images which reflected on the opportunities they were given to discover and develop competencies and abilities. These included students who reflected on new leadership strengths they had developed as a result of the Rocklands camp experience (over images of; leading groups, taking ownership of various activities and activity planning sheets). A number of images also expressed new found abilities to problem solve (multiple images of an activity course at Rocklands camp). For some students it was clear that they had conquered significant challenges during the program, both physically and emotionally. This can be seen by the images of the hikes up Lions head and the Cape of Good Hope, which proved physically challenging to some “I never thought I could do this” (Respondent 8, on a selfie on Lions head); “this was very hard for me, but it was important that I did it to prove to myself that I don’t need to shy from challenges” (Respondent 32, over a selfie on Cape of Good Hope). Finally a number of images reflected on encountering unfamiliar situations and adapting and responding effectively to those situations “I have never bunked with that many people before, it was a real challenge” (Respondent 26, over an image of a bunk room with 6 girls luggage spread on every available space). The most extreme example used however, was an image used by multiple respondents of hyenas in the camp at night, which meant having to brave wild animals to use the bathroom.

### Social factors

This, as would be expected produced a large number of images and reflections. Participants begin the trip as strangers “socially speaking, at first it was hard to make friends” (Respondent 9, reflecting on an image of students sitting in their campus cliques); “We were all so jet lagged that the first day was actually a bit of a disappointment” (Respondent 15, over an image of people sitting around the lounge); “At first we didn’t go anywhere except the convenience store down the street” (Respondent 6). As students are forced together however, they quickly make friends, and by the end of the trip strong emotional bonds have been developed “After the Karaoke night, our group was inseparable!” (Respondent 32, over an image of a student singing in a bar).

Almost all of the participants offered images and reflections which demonstrated the development of these strong social groupings. These images can be summed up by

the following reflections: “The prospect of leaving these people, who have become so important to me, makes me sad” (Respondent 11); “I don’t want to go back, this is my home, and these are my friends” (Respondent 35); and “We will always have a special bond that I don’t share with any of my other friends back home” (Respondent 22).

## CONCLUSIONS

The experiential nature of study abroad has been well understood historically, with the activity theorized as personal and subjective experiences that people go through; ones which are emotion laden for the participant. The emotions generated during a study abroad cannot easily be explained by traditional quantitative research methods. As a result, it is necessary to consider them through methods which explore how experiences affect a close understanding of what stimuli trigger certain emotions within participants. This allows us to create effective experiences which range from mildly positive to intense emotion (Schmitt, 2010). A number of the reflections generate constructs which make reference to strong emotions generated by participation in some of the study abroad experiences. An example would be guilt, an emotion aroused in many of the respondents. Participants felt guilty about their privileged lifestyle, the way in which the USA wastes precious resources; suggesting they should contribute more, or give away their possessions to those less fortunate.

The unique nature of the study abroad experience echoes the literature on co-creation; resulting in a personalized experience for each participant (Prahalad and Ramaswamy, 2004). Co-creation is an integral part of the study abroad experience, and it is apparent from the results above that participants are using both definite and indefinite constructs when construing their unique experiences. The constructs generated through the collection of images reflect the multi-sensory nature of experience, which results in attitudinal or cognitive effects. In addition, the experiences are conditioned by factors such as; differences in an individual’s emotional state, the non-linearity of experiences and sense receptor thresholds (Palmer et al., 2009). These effects may enable some individuals to engage in experiences more frequently, more intensely, and for longer periods than others (Csikszentmihaly, 1997).

A sense of camaraderie is engendered during study abroad, through multiple aspects, both physical, such as the activities and events they participate in, and the opportunity to be with peers and friends; and emotional, such as the sense of acceptance and perceived status (Cova & Cova, 2002). The social and participative nature of experiences has been comprehensively discussed within the literature (Edgell & Hetherington, 1996; Cova & Cova, 2002). Social relations are seen to shape experiences, through citizenship and group membership. The constructs highlighted by the results above suggest that study abroad achieves this intent. (McCole, 2004).

The role of authenticity is widely discussed within experiential literature, in particular as it relates to a postmodern orientation (Alexander, 2009). Alexander argues that there is a growth in demand for experience seen as genuine. This can be noted in the results above, particularly at the Africa Café and the game lodges. Respondents referred

to the rustic, unfinished nature of the Sabi Sands research centre as adding to the authenticity of the overall experience. By comparison the Africa Café seeks to provide authenticity through the nature of the product, which provides heritage and pedigree (Roche et al., 2005). Many of the participants however thought the authenticity was routinely manipulated, through staging experiences which intentionally use services as a stage and goods as props, in order to engage customers in a way that creates a memorable event (Pine and Gilmore, 2004). Despite their intent however, most respondents found it hard to view the café as an authentic African experience.

The role of study abroad in making global citizens of its participants is a worthy one, and the results above suggest one which is to a large degree achievable. Respondents routinely offered images which demonstrated reflections on the way of life they were experiencing and the ways in which this was changing their own worldview. Images were often used in the student reflections, as indicative of the vast cultural differences they were experiencing. These rich reflections are only possible utilising a research method such as ESM.

This research seeks to investigate how students interpret experiences they encounter whilst on study abroad. It is clear from the results that ESM offers a valuable qualitative research method in order to interpret the student experience. The methodology offers the researcher rich, complex and more varied data, than is routinely generated by surveys and other quantitative methodologies. The research suggests that methodologies such as ESM should be further investigated, in order to provide a meaningful and comprehensive understanding of the value of the study abroad experience to its participants and other stakeholders.

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# WORKING PAPERS

# PERCEPTIONS OF ETHICAL ISSUES IN TOURISM AND HOSPITALITY RESEARCH AND EDUCATION

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## ABSTRACT

*Little is known about the perceptions of educators, researchers, and graduate students regarding ethics in tourism and hospitality research and education. This pilot study examined those perceptions to investigate how these groups view ethics and unethical behavior in research and education. Preliminary results show that assigning authorship appears as an ethical issue for both faculty and graduate students, while plagiarism, as may be suspected, is reported as occurring with work conducted by graduate students. The completed study will provide the faculty members' and graduate students' views on ethics in research and education and how ethical standards are practiced or not practiced in tourism and hospitality.*

**KEYWORDS:** Education, Ethics, Perceptions, Research

## INTRODUCTION

As the attention on research and the focus on publishing in peer reviewed journals continue to grow and teaching responsibilities continue to be demanding in much of higher education, and specifically in the fields of hospitality and tourism, attention to ethics is also increasing in significance. Ethics are defined as the “norms of conduct that distinguish between acceptable and unacceptable behavior” (Resnik, 2011, p. 1) and include the principles, standards, and practices that underlie educators’ professional responsibilities and conduct (AERA, 2011). While most researchers and educators act in ethical ways and in general may never do anything intentionally unethical, it is possible that they engage in unethical behaviors regarding research and education.

Ethics help hold researchers accountable to the public, build public support, and support social values, including social responsibility, human rights, and legal compliance (Resnik, 2011). Resnik (2011) further explained that although the level of misconduct in research may be quite low, it could have significant influence. Murray et al (1996) explained education is about teaching others and preparing students for future roles in education and industry and thus, education should also be conducted in an ethical manner. Ethical teaching and educational processes matter, for although academic

freedom is important, it can be practiced in a responsible manner (Murray, et al. (1996). However, little is known about these kinds of behaviors in hospitality and tourism research and education or how these issues might be perceived by the faculty members and graduate students involved in these endeavors. This exploratory study seeks to explore ethical issues in research and teaching in hospitality and tourism and to identify faculty members' and graduate students' perceptions of these issues.

## PURPOSE AND RESEARCH QUESTIONS

The purpose of this research is to investigate tourism and hospitality faculty members' and graduate students' perceptions of possible ethical issues involved in research and education in tourism and hospitality. This exploratory study is guided by the following questions:

- What are researchers', educators', and graduate students' perceptions of ethics in tourism and hospitality research and education?
- What do researchers, educators, and graduate students perceive to constitute unethical behaviors in tourism and hospitality research and education?

## LITERATURE REVIEW

The following review of literature focuses on research ethics in historical context and as applied to research today, as well as educational ethics. Research ethics can be defined as "the ethics of the planning, conduct, and reporting of research" (UCSD, 2014). The ethical principles of research have evolved from the Nuremberg Code, the Helsinki Declaration, and the Belmont Report in 1979 with guidelines for conducting research with human subjects (UM, 2003; USDHHS, 2014). Subsequently, research policies have expanded to include guidelines for the protection of human subjects, to increase roles of institutional review boards in the oversight and approval of research studies on campuses, and to provide ethical guidelines for the entire research process from design to reporting the findings (UM, 2003). Overall, research ethics seek to protect the public, the subjects involved in research, and the researchers themselves.

According to an author of a frequently cited reference on research methods, "Any research study raises ethical considerations" (Lewis, 2003, p. 66). Unethical behavior in research can include deliberate misconduct, falsification, fabrication, plagiarism, questionable research practices, and irresponsible conduct of research (Steneck, 2006). According to the authors of a large study on research ethics (Swazey, Anderson, Lewis, Louis, 1993), unethical behavior in research can be placed into three categories, including: (1) misconduct in research (fabrication, falsification or plagiarism); (2) questionable research practices (keeping poor records or allowing honorary authorship); and (3) other misconduct (sexual misconduct or violation of government regulations). In their study conducted of faculty members and graduate students in mainly in the non-social sciences over two decades ago, Swazey et al. (1993) found that academic misconduct was perceived to be present in the way that research was conducted on 99 campuses in the United States. While the National Science Foundation (NSF) and the Department of Health and Human Services typically report 20 to 30 cases of misconduct

in research per year (NSF, 2005; Rhoades, 2004), Steneck (2006) noted that these confirmed cases do not necessarily provide a realistic picture of unethical behavior in research.

In a more recent study of the ethical standards of research in tourism, where authors used probability-sampling methods, the authors analyzed 187 articles from 2007-2009 in the *Annals of Tourism Research*, the *Journal of Travel Research*, and *Tourism Management* determining the research had some ethical issues (Frechtling & Boo, 2012). Frechtling and Boo (2012) found only about half of the studies described the sampling methods used, and approximately ten percent of the studies reported the estimated sampling error or included the actual survey instrument used in the research. The unstructured nature of qualitative research means ethical considerations are especially important and consideration has to be given to consent, confidentiality, and debriefing participants and even researchers due to the in-depth nature of the data gathered (Frechtling & Boo, 2012; Lewis, 2003).

Educational ethics for university teaching are also important and include the following nine principles: content competence, pedagogical competence, dealing with sensitive topics, student development, dual relationships with students, confidentiality, respect for colleagues, valid assessment of students, and respect for the institution (STLHE, 2014). Additionally, ethical teaching involves avoiding practices that may do educational or emotional damage to students (Keith-Spiegel, et al., 2002). Although ethics have been addressed in a number studies (Keith-Spiegel et al., 2002; Murray, 1996), not much is known about the ethical behaviors involved in research and teaching in hospitality and tourism, and to understand the ethical behaviors involved in these disciplines it appears that serious attention to the values, standards, and actions is crucial (Swazey et al., 1993). This study explores the perception of ethics in research and education in hospitality and tourism.

## METHODOLOGY

For this study, permission to use the survey used in the Swazey, et al (1993) study was granted by Drs. Swazey and Anderson. Thus far in this work-in-progress research study, a pilot test of the adapted survey instrument (Swazey et al., 1993) and new open-response questions was completed in May 2015. The survey was comprised of primarily closed-ended items with the addition of a few open-ended items, which include the opportunity for faculty members and graduate students to offer their opinions on ethics beyond their responses in the survey. Qualtrics software was used for data collection. The survey link was sent to hospitality and tourism educators and graduate students known by the researchers for this pilot test and they were asked to complete the survey and to provide additional feedback to the researchers.

The complete study will begin in summer 2015 with the launching of the survey. The survey link will be sent to hospitality and tourism faculty members and graduate students who subscribe to list serves that the authors subscribe to within the discipline. Survey results will be analyzed using SPSS 22 for all closed-ended items and the researchers will code and theme the open-response items for further analysis. Some

preliminary results have been gathered and are reported and discussed in the following sections.

## PRELIMINARY RESULTS

Twenty-three individuals (faculty members = 15 and graduate students = 8) completed the survey and provided feedback to the authors during the pilot test for this work-in-progress research. Faculty members represented instructors (n = 3), assistant professors (n = 6), associate professors (n = 3), and professors (n = 3) and all but one of the faculty members (n = 14) hold a terminal degree. Faculty members and graduate students were asked to report if they have observed specific misconduct by faculty members (colleagues or professors); see Table 1 for preliminary results.

Table 1. Observations of Misconduct by Faculty Members

Variable	0	1 – 2	3 – 4	5 or more	Total Responses	Mean
Plagiarism	20	2	0	1	23	1.22
Inappropriately assigning authorship credit	15	6	2	0	23	1.43
Failing to present if it contradicts previous work	18	2	2	1	23	1.39
Using one's position to exploit or manipulate	13	4	3	3	23	1.83

Faculty members and graduate students were asked to report if they have observed specific misconduct by graduate students (graduate students or peers); see Table 2 for preliminary result.

Table 2. Observations of Misconduct by Graduate Students

Variable	0	1 – 2	3 – 4	5 or more	Total Responses	Mean
Plagiarism	6	6	7	4	23	2.39
Inappropriately assigning authorship credit	14	4	4	1	23	1.65
Failing to present if it contradicts previous work	20	0	3	0	23	1.26
Using one's position to exploit or manipulate	19	2	2	0	23	1.26

## PRELIMINARY DISCUSSION AND EXPECTED CONTRIBUTIONS

Though reported plagiarism was low among faculty, it was reported at a greater occurrence among graduate students; however, this may simply be that graduate students are still learning what plagiarism truly entails. The higher number of occurrences for graduate students may suggest a problem and possibly any reported number for faculty could be seen as an ethical issue. Assigning authorship for both faculty and graduate students appears to be an ethical issue thus far and will be interesting to see how this changes in the larger study. For now, preliminary results show a small number of ethical issues among faculty members and graduate students.

Once completed, results of this exploratory study will provide information about how ethics are perceived and applied in the area of hospitality and tourism research and education. In addition, findings from this study will raise awareness of possible issues with regard to research and teaching practices in tourism and hospitality. The information will help to inform the discussion of ethical research and teaching practices to foster ethical research and education in the field of tourism and hospitality.

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# THE EFFECTIVE USE OF INNOVATIVE STRATEGIES IN TEACHING HOSPITALITY ETHICS ONLINE AT A GRADUATE LEVEL

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## ABSTRACT

*Most research has been devoted to teaching ethics face-to-face in non-hospitality programs. Hardly any emphasis has been placed on the effective strategies of teaching ethics to hospitality students in conventional courses and combining it with the online education which is blossoming so quickly is yet to be examined. The purpose of this paper is to present the design, development, teaching methods used and results that derived from a hospitality ethics course that the author put together and taught to graduate students last year so as to share her knowledge and expertise and create a better future for the hospitality education.*

**KEYWORDS:** Online education, hospitality ethics, teaching methods

## INTRODUCTION

Online education is becoming increasingly popular in hospitality programs in the U. S. (Dimitriou, 2014). Hardly any of them offer a course specifically designed and developed to teach hospitality ethics at any level. In most cases, hospitality and tourism professors who are sensitive to hospitality ethics and value its importance to a student's successful career are restricted to referring to ethical issues briefly while teaching other courses. In the meantime, the number of ethical scandals in hospitality settings keeps increasing which stresses the duty of academia to emphasize ethical education in their curriculum. These ethical scandals include cases on a corporate level such as the case of Starwood Hotel and Resorts Worldwide Inc. which sued Hilton for stealing the company's trade secrets to advance Hilton's luxury brands (Orey, 2009). They also include cases on an individual level where a number of lawsuits were filed by employees against hotels for discrimination and violation of other employee rights, e.g. the case of a banquet manager, Glen Ellyn, who sued Starwood Hotels for age and sex discrimination (Ronay, 2009) or the case of Charlotte Thomas who was 67 years old when she was fired by the Marriott Courtyard Hotel near Hilliard, OH in 2007 and was replaced by two younger women. Thomas sued for age discrimination and the jury awarded her \$140,164 in compensatory damages and \$300,000 in punitive damages (Cadwallader, 2009).

The complexities of teaching ethics face-to-face in non-hospitality programs and the quest for more research on this area have been widely reported (Phillips, 2005). According to Dimitriou (2014), "teaching in an online environment can be more pedagogically rigorous and challenging than conventional courses" (p. 1) which gets much more complicated when it comes to teaching a hospitality ethics course online due to the unique characteristics not only of this topic, but also the specific industry it refers

to. The purpose of this paper is to present a detailed description of the innovative strategies that the author applied to the Hospitality Ethics course she designed, developed, and taught online at a graduate level in an American University last year. The author aims to share the results and effectiveness of these strategies with other educators in order to contribute to the advancement of knowledge in the field.

## THEORETICAL BACKGROUND

The literature offers various different approaches on how to teach ethics. Many researchers (James & Smith, 2007; Kayes, 2002; Landrum, 2001; Tomlinson, 2009) prefer the use of case studies which expose students to ethical dilemmas and they are expected to identify the most appropriate solution. Others (Cagle & Baucus, 2006; Rasmussen, 1984; Schnelle, 1967; Wexley & Latham, 1991) acknowledge the power of the personal experience and its significance in the student's ability to better absorb terms and concepts. Some researchers (Barak & Dori, 2005; Cherney, 2003; Lou & MacGregor, 2004) placed emphasis on project based-learning. Lieberman and Nissen (2008) in their book called: "Ethics in the hospitality and tourism industry" combined the use of case studies with several ethical theories in order to present how these theories apply to different segments of this industry.

The author designed a hospitality ethics course to teach graduate hospitality students to distinguish right from wrong in the workplace based on moral values and develop critical thinking and ethical decision-making skills. Ethical theories and their application to various hospitality settings were emphasized through a "hands-on" approach. This paper suggests that a combination of different teaching methods can positively and significantly impact students' learning and behavior. More specifically, it is supported that this kind of teaching: a) allows students to develop strong critical thinking skills, b) makes them able to identify with great ease an ethical from an unethical course of action or decision in their working life, c) helps them consciously make the right choice, and d) shows them how to apply ethical and responsible leadership in their future career.

## DESCRIPTION OF STRATEGIES USED

### Important Guidelines:

- Created a very user-friendly online course.
- Built a motivating online community where respect, harmonious cooperation, and great communication prevailed.
- Course objectives as well as weekly and daily ones were clearly presented to students to help them stay focused.
- From time to time, "Announcements" were sent out to remind students of important events, and communicate with them.
- PowerPoint presentations were prepared and posted each week in order to accompany students' assigned readings.

- At times, students were encouraged to go beyond the required textbooks and review other sources (peer reviewed journal articles, web sites, etc.) to gain additional insights and strengthen their background in a particular area.
- The author valued the importance of providing both individual and general feedback to all students weekly. This increased significantly students' enthusiasm for the course and their motivation and commitment to work harder.
- All assignments included clear objectives and guidelines.
- Grading process was transparent as all rubrics were shared with students in advance.

### Discussion Boards

The most powerful tool that substitutes the in-classroom discussion in an online setting is “the synchronous and asynchronous course delivery and participation. These online tools can stimulate very interesting conversations and exchange of thoughts and ideas on ethical issues, when wisely used and included in a hospitality ethics course” (Dimitriou, 2014, p. 4). Indeed, the relevance of the discussion topics and the stimulating questions that were posed elevated significantly the level of the discussion. The most effective teaching strategy, as voted by students, was the author’s purposeful lack of participation in the discussion boards during the week. Students expressed freely their justified arguments and the author would “step in” at the end of the week to provide any comments, key points and clarifications on an individual and group level.

### Book Assignment

A book assignment related to intuitive decision-making was set, followed by critical thinking questions which would help students decide when, where, why and how to use this skill.

### Case Studies

The author combined various teaching strategies to incorporate case studies in the learning process. Students worked on case studies where the instructor demonstrated first how it should be approached on similar situations (teaching by example), where students were asked to base the answer on an ethical theory, where the scenario was drawn from their own personal experience, where students read about how it was solved based on different ethical theories and then asked to apply this method to other case studies, or where students were asked to comment on and discuss with classmates how the ethical dilemma of a case study should be solved (teamwork).

### Research Paper

Students were asked to research and analyze the challenges and opportunities in developing and implementing an effective organizational code of ethics for hotels. Through this paper, students applied the knowledge learnt in class and used their critical thinking and ethical decision-making skills.

## CONCLUSION AND FUTURE RESEARCH

At the beginning, students' resistance to opening up and sharing examples from their personal life and ethical beliefs was quite strong. It took a lot of patience, effort, and time needed to explain to students how this would bar the way to their effective learning and development of critical thinking and ethical decision-making skills. By the end of the course, students admitted that they learnt a lot and started noticing changes in the manner they were viewing things. The majority of students suggested that this course should not be offered as a "Special Topics" one, but become a compulsory course instead. They explained that this course was very useful in helping them understand how each ethical theory applies in different hospitality settings and how they can tackle ethical dilemmas successfully.

Further research is needed to check whether this hospitality ethics course would receive same reactions and be similarly effective, if offered to undergraduate students online. It would also be interesting to try these methods in a hospitality ethics course that would be taught face-to-face to both undergraduate and graduate hospitality students. The purpose would be to measure those students' perceptions of its effectiveness, importance, and need to be included in their hospitality and tourism curriculum in the future.

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# FAMILY DECISION MAKING PATTERNS OF CULTURAL TOURISTS VISITING NORTH DAKOTA ATTRACTIONS

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## ABSTRACT

*North Dakota has several heritage and cultural attractions, yet little research has been conducted on visitors to these tourist destinations. This study looked at family units' decision-making patterns in regard to three heritage and cultural sites in the state. Intercept surveys were conducted at the site. Over 300 completed questionnaires were collected, of which almost all were traveling as family units. Results provide some insights to the visitors' decision-making patterns, in that two of the sites showed similar joint decision patterns and one site had more of a one person dominant pattern. The decision-making patterns could aid with marketing efforts.*

**KEYWORDS:** family-decision making, North Dakota, heritage and cultural tourism

## INTRODUCTION

Tourism activities take place around attractions (McKercher & Ho, 2006). Heritage and cultural tourism involves visiting a number of cultural and heritage oriented facilities and concentrates on a destination's historic, natural, and cultural value, encompassing landscapes and settings to highlight natural physical beauty, urban and industrial development, and historical landmarks (Boyd, 2002). North Dakota tourism has seen a 12% increase in the number of visitors to major attractions in the state (North Dakota Tourism, 2015). Based on the state's inventory of major attractions, cultural and heritage sites, can be a successful tourism product.

## CULTURAL AND HERITAGE TOURISM

Cultural and heritage tourism has been known to contribute to the improvement in the quality of life for the residents as well (National Trust for Historic Preservation, 2006). Furthermore, on average heritage/cultural tourists spend about one-third more money on trips: \$623 compared to \$457, excluding transportation (Goeldner & Ritchie, 2006). As a result, cultural tourism induces positive economic impacts, community image improvement, and developmental foundations. In particular, job creation and economic

benefits are frequently reported related to cultural heritage tourism (Edwards & Llurdes, 1996). Therefore, the increasing demand for heritage and cultural tourism has also proved to be a stable and promising development both to the community and its residents. Furthermore, heritage/cultural tourism facilitates and initiates image building in the region and promotes the creation of regional identity (Dreyer, 1996; Linstaedt, 1994) by inducing increasing public and corporations' support (Dickinson, 1996).

## FAMILY DECISION MAKING PATTERNS

Individuals in family travel interact with others during the decision-making process and those interactions affect or influence the final destination choice (Kang & Hsu, 2005). Generally, family vacation decisions are considered as either a couple-joint or syncretic unit (i.e., involving all members of the households). Because more than one person is involved in the destination choice process, family and couples are important decision units of analysis in addressing group destination selection process. Su, Fern, and Ye (2003) reported that in a couple decision making one individual must change their preferred alternatives and give up decision control to the other or take control of the decision-making. As with families, couples express their own preferences individually, while simultaneously trying to avoid disagreement, as they are tied by love and affection.

## STUDY PURPOSES

The significant number of travelers who have visited heritage and cultural events and attractions combined with their propensity to spend more money, make them a very attractive market segment for the state of North Dakota. Few studies have been conducted on how visitors' objective socio-demographic profiles are related to the decision making patterns that were exhibited in planning vacations for heritage and cultural related tourism activities in North Dakota. Therefore, the purpose of this study was to: 1) identify family decision making patterns in a family trip unit.

## RESEARCH INSTRUMENT AND DATA COLLECTION

A questionnaire was developed based on previous literature review encompassing travelers' behaviors, motivations, and family decision making. Family decision making questions were specifically derived from Kang, Hsu, and Wolfe (2003)'s study. A total of 10 questions on family decision making were included: trip needs, information collection and evaluation, during trip subdecisions, and purchasing stages as introduced in travel decision making models (Assael, 1998; Mayo & Jarvis, 1981; Um & Crompton, 1992; Woodside & Lysonski, 1989).

The questionnaire included demographic information (i.e., age, gender, residing state, marital status, presence of children under the age of 18, education, income, and average vacation frequency), trip characteristics (i.e., purpose of trip, composition of travel party, activities involved, length of stay (LOS), accommodations, etc.) and decision making patterns. Demographic information and trip characteristics were asked using a category scale. The modified version of the constant-sum scale that was originally

developed by Jenkins (1978) was employed to identify decision making patterns. In his original scale, Jenkins used a total of 100 points for allocation, however, this study asked each respondent to use 10 points in indicating how much of each family member influence each category of travel related decision (Kang, Hsu, & Wolfe, 2003).

Data were collected via intercept surveys at three tourist attractions in the state of North Dakota. In North Dakota, the most popular tourist attraction is the Medora area. Medora is the gateway community to the Theodore Roosevelt National Park located in the badlands of North Dakota; the park has over 100,000 visitors annually (NPS, 2008). Two other popular cultural attractions in the state where the survey was conducted were the Lewis & Clark Interpretive Center and the International Peace Garden. The Lewis and Clark Interpretive Center is located in Washburn, ND. It is only 40 miles north of Bismarck, the state capital. The center opened in 1997 and focuses on Merriweather Lewis and William Clark's historic transcontinental exploration of the Missouri River through the central plains and onto the Pacific Northwest (Lewis & Clark, 1998). The International Peace Garden (IPG) is located on the Canada and United States border in the north central part of the state. Built in 1932, the IPG commemorates the long and lasting peace and friendship that has existed between the people of Canada and the United States. Located on the 49<sup>th</sup> parallel, the longest unsecured national border in the world, the 2,339 acre botanical garden is visited by over 60,000 visitors a year (personal communication with Director, Doug Hevenor, January 4, 2007). The attraction is one of North Dakota's and the country's most symbolic and scenic attractions (ND Dept. of Tourism, 2002).

Questionnaires were administered by workers and volunteers at each site over a period of three months (June, July, August), which is the 'peak' tourism season in North Dakota. The workers and volunteers were trained to hand out the questionnaire to every 10<sup>th</sup> visitor. The respondents were asked to return the questionnaire to the designated drop box at the site. A total of 368 questionnaires were collected from the three sites, 52 responses were identified as unusable. Thus, 316 samples were included and processed for further analysis.

## DATA ANALYSIS

All survey items were calculated for descriptive statistics. All ten decision making patterns were categorized into one of the followings for further analyses: Individual dominant (i.e., husband, wife, child, grandparents) - when an individual traveling family member scored over 75% of the total points, that individual was regarded as a dominant decision maker in that decision-making category, couple joint (husband and wife), or combinations of possible traveling pairs (e.g., one partner with child(ren) joint), or syncretic (i.e., all family member joint decisions). Furthermore, a series of chi-square and ANOVA analyses were conducted to identify differences on decision making patterns for all decisions being analyzed and to examine the relationships between respondents' family decision making patterns and their travel characteristics and profiles.

## DEMOGRAPHICS OF RESPONDENTS

Of 316 questionnaires completed, a total of 299 were identified as a family unit. A majority of the respondents indicated they traveled in a composition of either both parents with a child(ren) or a grandparent(s); or a single parent with a child(ren) or a grandparent(s). A total of 284 completed questionnaires were usable with completion of all family decision making questions. Respondents showed nearly equal distributions among three data collections (Lewis & Clark = 26.4%, Medora = 42.6%, and International Peace Garden = 31.0%). There were more female (61.3%) respondents and approximately three-quarters (76.3%) of the respondents were older than 40 without a child(ren) under 18 living at home (61.3%). Slightly less than half (43.6%) of the respondents held a four-year college degree or higher. Over half (55.9%) of the respondents reported an annual income between \$25,000 and \$74,999, with 26.6% earning between \$25,000 and \$49,999 and 29.3% making between \$50,000 and \$74,999 . The average number of vacations taken in the previous year was four.

Table 1. Demographic Characteristics

Characteristics		%
Locations (n=282)	Lewis & Clark Interpretive Center	26.4
	Medora	42.6
	International Peace Garden	31.0
Gender (n=282)	Male	36.2
	Female	61.3
Age (n=279)	Under 18	5.4
	18-30	5.4
	31-40	12.9
	41-50	25.8
	51-60	24.0
	61-70	21.1
	71 or over	7.9
Income (n=229)	Less than US \$25,000	4.4
	US \$25,000-\$49,999	26.6
	US \$50,000-\$74,999	29.3
	US \$75,000-\$99,999	8.3
	US \$125,000 or more	10.0
Children under the age of 18 living at home (n=279)	Yes	38.7
	No	61.3
Education (n=280)	Grade school	11.1
	High school or GED	12.1
	Vocational or technical school	13.9
	Some college	19.3
	College degree	20.7
	Graduate school or graduate degree	22.9
Average vacations in the previous year (n=266)	mean	3.95
	mode	3.00

## FAMILY DECISION MAKING PATTERNS

As shown in Table 2, a total of nine decisions were analyzed according to four decision making patterns, couple joint, male dominant, female dominant, and child/grandparents joint dominant by a data collection location. No syncretic units (all family member joint decision) were included because it was rarely identified as a major

decision pattern in this study. When the data were aggregated among the three data collection sites, seven decisions were dominated by joint decision patterns. Three activities, information collection, information evaluations, and travel arrangement, were all female dominant. When the identified patterns were observed by each data collection site, however, interesting results were noted. Overall, visitors at the Lewis and Clark Visitor Center and Medora areas reported a joint (couple) decision making as predominant patterns, while those from the International Peace Garden indicated more individual dominant patterns.

Table 2. Family Decision Making Patterns by location

	FDM pattern	Lewis/Clark (%)	Medora (%)	Peace (%)
Need arousal ( $\chi^2 = 69.18, p <.000$ )	Joint	61.3	62.2	11.4
	Male	17.3	16.0	39.8
	Female	12.0	15.1	33.0
	GP/Child	9.4	5.9	15.9
Information collection ( $\chi^2 = 30.96, p <.001$ )	Joint	30.7	27.7	9.1
	Male	17.3	21.0	37.5
	Female	41.3	4.3	36.4
	GP/Child	6.0	4.2	14.7
Information evaluation ( $\chi^2 = 71.65, p <.000$ )	Joint	42.7	37.8	9.1
	Male	17.3	18.5	33.0
	Female	20.7	30.3	40.9
	GP/Child	5.3	5.1	14.7
General place to travel ( $\chi^2 = 152.75, p <.000$ )	Joint	64.0	69.7	12.5
	Male	13.3	8.4	33.0
	Female	17.3	15.1	39.8
	GP/Child	2.6	1.7	12.5
Particular location ( $\chi^2 = 203.20, p <.000$ )	Joint	60.0	64.7	14.8
	Male	16.0	29.1	30.7
	Female	18.7	16.8	40.9
	GP/Child	5.3	3.3	13.6
LOS ( $\chi^2 = 155.41, p <.000$ )	Joint	58.7	61.3	14.8
	Male	18.7	12.6	33.0
	Female	18.7	17.6	39.8
	GP/Child	2.6	5.9	12.5
Activities ( $\chi^2 = 147.16, p <.000$ )	Joint	70.7	73.9	15.9
	Male	10.7	10.9	30.7
	Female	13.3	7.6	38.6
	GP/Child	2.6	4.2	12.5

Table 2 continued. Family Decision Making Patterns by location

	FDM pattern	Lewis/Clark (%)	Medora (%)	Peace (%)
Accommodation ( $\chi^2 = 69.79, p < .000$ )	Joint	46.0	47.9	11.4
	Male	22.7	13.4	29.5
	Female	28.0	24.4	40.6
	GP/Child	4.0	7.5	13.6
Travel arrangement ( $\chi^2 = 96.76, p < .000$ )	Joint	38.7	35.3	10.2
	Male	22.7	21.0	31.8
	Female	30.7	33.6	42.0
	GP/Child	5.3	9.2	15.9

## CONCLUSIONS

The ND Tourism Division can market some of the top attractions with similar marketing and promotional materials. For instance, Medora and the Lewis & Clark Interpretive Center ads could target joint decision-making family units with pictures of couples featured in male and female dominant media sites. The ads for the International Peace Garden may need to be more specific to the activity (botany, music, etc.). The decisions for these visitors are more likely made by the enthusiast for the activity.

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# MEASURING THE ACCUMULATIVE TRANSFORMATIVE EFFECTS OF FIELD TRIPS IN TOURISM MANAGEMENT STUDENTS IN PERU: A PROPOSED FRAMEWORK

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## ABSTRACT

*This paper reports on research about the accumulative transformative effects of fieldtrips in tourism management students from a private university in Lima - Peru. The research focuses on effects related with environmental and social awareness as well as personal and professional development. The study was conducted using a convenient sample of 74 students who had taken at least three fieldtrips. Quantitative analysis confirmed that fieldtrips increase social and environmental awareness and respect but do not necessarily encourage students to get involved in helping projects related to these causes. Also they have a positive influence in personal as well as professional development. However, they still have a strong perception of fieldtrips as fun experiences rather than educational ones. Besides filling a gap in the literature, this study provides valuable information for educators as well as tourism management program directors from different universities and colleges around the world.*

**KEYWORDS:** Field trips, transformative travel, sustainability awareness, personal and professional development

## INTRODUCTION

Travel has been recognized as an important vehicle for transformative education and learning since the XVII century when the Grand Tour started taking place in Europe (Haukeland et al., 2013; Morgan, 2010; Ritchie, 2003). Based on the priorities of people who get engaged on educational tourism, Ritchie (2003) referred to education for those who have a general interest in learning while travelling and for those whose main purpose is learning through travelling.

Fieldwork, understood as “any component of the curriculum that involves leaving the classroom and learning through first-hand experience” (Boyle et al., 2007: 300), has been the focus of many studies in geography and environmental sciences (Fuller and France, 2015; Fuller et al., 2014; Fuller, 2012; Yilmaz & Bilgi, 2011; Ooi, 2008; Boyle et al., 2007; Besenyei et al., 2004; Fuller et al., 2000). In more recent years, academics have

started to focus specifically on fieldtrips within hospitality and tourism programs (Goh, 2011; Kelner & Sanders, 2009; Sanders & Armstrong, 2008; Xie, 2004).

Despite this increased popularity, quantitative research is still needed to evaluate whether students' agree about the positive accumulative transformative effects of fieldtrips in a tourism management program. Therefore, the purpose of this study was to examine (a) the accumulative effects of fieldtrips as a sustainable tourism awareness tool; and (b) the accumulative effects of fieldtrips as a personal and professional development tool. The subjects for this study were students from the Tourism Management program of Universidad San Ignacio de Loyola – USIL (Lima, Peru), which designs and organizes alternative tourism trips for its students every academic semester over the five year period of this degree. During the two first semesters students participate in full-day outdoor activities. After the first year they participate in 4-day trips which main objective is to familiarize students with sustainable and responsible tourism projects. Therefore, all of these trips combine visits to natural areas and interactions with communities in rural areas in the Peruvian highlands and/or rainforest.

Results from this study will provide valuable insights and educational implications for faculty from tourism related programs who are already using fieldtrips or are considering doing so.

## LITERATURE REVIEW

Nowadays teachers encounter more challenges in encouraging their students to have a more active role in their learning, reason why a plethora of alternative methods have arisen. Such is the case of *experiential learning*. Although it's been researched quite limitedly, it has proven to help ease the process of linking theory and practice (Goh, 2011; Hvenegaard, 2008; Kelner & Sanders, 2009), improve understanding of abstract concepts, and respond to diverse learning styles (Xie, 2004).

Studies show that moving the learning experience outside the classroom can be more successful (Besenyei et al., 2004). Therefore, fieldtrips have been identified as a tool that allows students engagement with a particular space and improve their understanding and knowledge related to its context, and other members of their group (Kelner & Sanders, 2009; Sanders & Armstrong, 2008).

Along the lines of *experiential learning* comes the concept of *transformative learning*, which refers to the “shift” of perspective that a person experiences through the engagement with different contexts (Morgan, 2010). The pivotal element that can trigger it is facing the student with what Mezirow (2000) calls a “disorienting dilemma”, which pushes them to reevaluate their perspective and preconceived ideas regarding the new environment. To cope and be able to get involved with this new environment they experience a transformation process which implies development of new skills or strengthening of existing ones (Coghlan & Gooch, 2011; Morgan, 2010). This dilemma can be easily found on fieldtrips, as tourism encourages the encounter with social groups

and environments different from students' usual interactions (Morgan, 2010; Pritchard et al., 2011).

According to Ritchie (2003), one of the key differences between educational tourism experiences and regular tourism experiences is that besides visiting attractions and events, they should contain encounters with resource specialists and destination planners. This interpretation component should first lead to the formation of subjective meaning or personal understanding of the destination and eventually to concern for its long-term protection (Tilden, 1957; Ham, 2009; Haukeland et al, 2013).

Sustainability awareness and pro-environment attitudes and behaviors are common goals of fieldwork when exposing students to natural settings (Haukeland et al. 2013; Hvenegaard, 2008). However, Morgan (2010) identified two types of context that have the power of leading to transformation: nature/wilderness and contrasting cultural contexts. As stated by Ooi (2008: 33), "in a world that is increasingly fragmented and polarised, fieldwork has become far more important than ever before in understanding social and cultural differences". Therefore, interpersonal encounters play an important role in *transformative learning* (Kelner & Sanders, 2009) as encountering very different sociocultural values and behaviors in a unfamiliar place could have the power to get the traveler to a "mind-set" conducive to transformation (Morgan, 2010).

Besides enhancing the respect for the environment and other cultures, within the key educational objectives of fieldwork pointed by Fuller et al. (2000), there are several related to a more broad personal and professional development. Xie (2004) suggested that personal development is the most important benefit of fieldtrips. Personal and spiritual experiences can provide students with more opportunities of reflection, empathy and broadening of their world view, while having a positive influence in their learning process (Christie et al., 2015; Morgan, 2010). During fieldtrips students discover gaps, deficiencies and mistakes in their previous understanding which leads them to a self-directed learning and a better understanding of teamwork, helping teachers accomplish learning outcomes.

Therefore, the authors propose a model that incorporates the following aspects that are identified as critical transformative effects of fieldtrips within tourism management students: environmental, social, personal and professional.

## METHODOLOGY

In June 2015 a survey was conducted among students of USIL's Tourism Management program who had participated in at least three 4-day fieldtrips organized by the program. The total number of students who were enrolled between the 5<sup>th</sup> and 10<sup>th</sup> semesters on this program was 198. A convenience sample of 86 students was surveyed, and out of those, 74 had participated in at least three fieldtrips, which represents a response rate of 37.4%.

The instrument was divided in two sections. First, students were asked to use 5-point scales anchored in “Totally disagree” (1) and “Totally agree” (5) in order to determine their level of agreement with 40 statements reflecting a diversity of possible transformative effects of fieldtrips divided into the 4 aspects that were identified as critical: environmental, social, personal and professional. As no previously established scales were used, Cronbach’s alphas were computed to assess internal reliability of the statements used for each of the examined aspects (Cortina, 1993). Cronbach’s alphas over .6 were expected following the minimum recommended coefficient (Nunnally & Bernstein, 1994). Only in the case of the environmental aspect, the obtained reliability coefficient was below the recommended minimum. However, results are still being reported as the scale was constructed based on the broader understanding of the concept of environmental impacts suggested in 2012 by the Global Sustainable Tourism Council’s Sustainability Criteria, which involves natural and cultural tourism settings.

The second part of the questionnaire gathered demographic information of participants (e.g., age, gender) as well as travel-related questions (e.g., frequency of domestic and international travel other than fieldtrips). These variables are not being further studied as they do not pertain the purpose of this paper.

In the preliminary stage of the study descriptive analysis was performed on each of the four aspects previously stated to determine the ones perceived as more relevant effects related to fieldtrips.

## RESULTS

Preliminary descriptive analysis indicated participants had an average age of 21 years (Table 1), and a majority of them were female (75.3%) which is consistent with the age and gender distribution of the population.

Table 1. Respondents’ demographic profile.

	n	%
Gender (n = 73)		
Male	18	24.7
Female	55	75.3
Age (n = 69)		
18-21 years old	40	58.0
22-25 years old	21	30.4
Over 25 years old	8	11.6
Mean		(21.6)
Standard Deviation		(2.8)

Regarding social awareness (Table 2), statements related to respect for other cultures had a high level of agreement (M=4.6), along with the need for a responsible approach in tourism management (M=4.4), and the enhancement of their cultural identity

(M=4.4). In contrast, statements related to achievement of social justice (M=3.8) and involvement with humanitarian causes (M=3.5) received the lowest levels of agreement, close to the neutral point.

Table 2. Sustainability awareness effects: social aspects.

	n	Agree	Neutral	Disagree	M <sup>a</sup>	SD
Did not raise my respect for other people's cultures and traditions. <sup>b</sup>	74	6.8	0.0	93.2	4.6	0.8
Provided me with a broader awareness of the need for a socially responsible approach for tourism management.	73	93.2	1.4	5.5	4.4	1.1
Enhanced my cultural identity.	73	91.8	4.1	4.1	4.4	1.0
Provided me with a broader awareness of the socio-economic inequality issues around my country.	74	89.2	5.4	5.4	4.3	1.0
Stimulated my concern for the long-term development of different communities around my country.	74	86.5	6.8	6.8	4.2	1.0
Helped me understand the roles of the different tourism stakeholders.	74	85.1	9.5	5.4	4.1	0.9
Did not enhance my understanding about the benefits of community collaboration for better tourism management. <sup>b</sup>	74	16.2	4.1	79.7	4.0	1.3
Enhanced my understanding about the benefits of public-private alliances for a better tourism management.	74	81.1	8.1	10.8	3.9	1.1
Stimulated my concern for social justice around my country.	74	68.9	21.6	9.5	3.8	1.0
Did not motivate me to get involved in helping humanitarian causes. <sup>b</sup>	74	24.3	16.2	59.5	3.5	1.3

<sup>a</sup>Scale ranged from "1 = completely disagree" to "5 = completely agree".

<sup>b</sup>Reverse-scoring was performed.

Regarding environmental awareness (Table 3), the statement related to greater understanding of cultural resource diversity received the highest score (M=4.4). Only one statement related to involvement with environmental causes received a relatively low level of agreement (M=3.9).

Table 3. Sustainability awareness effects: environmental aspects.

	n	Agree	Neutral	Disagree	M <sup>a</sup>	SD
Enhanced my understanding about the diversity of historic-cultural resources of my country	74	93.2	2.7	4.1	4.4	0.9
Provided me with a broader awareness of environmental issues around my country	74	94.6	0.0	5.4	4.3	0.9
Enhanced my understanding about the diversity of natural resources of my country	74	91.9	4.1	4.1	4.3	0.9
Raised my respect for historic-cultural sites	74	91.9	2.7	5.4	4.3	0.9
Raised my respect for nature	74	89.2	5.4	5.4	4.3	1.0
Improved my understanding of the value of the environment for tourism	74	87.8	5.4	6.8	4.3	1.0
Provided me with a broader awareness of the need for an environmentally responsible approach for tourism management	74	89.2	4.1	6.8	4.2	1.0
Stimulated my concern for the long-term protection of different historic-cultural sites around my country	73	87.8	5.5	5.5	4.2	1.1
Stimulated my concern for the long-term protection of different natural areas around my country	74	86.5	6.8	6.8	4.2	1.0
Motivated me to get involved in helping environmental causes	74	74.3	18.9	6.8	3.9	1.0

<sup>a</sup>Scale ranged from “1 = completely disagree” to “5 = completely agree”.

Regarding personal development (Table 4), statements related to classmate relationship improvement (M=4.3), and awareness of other lifestyles (M=4.2) ranked highest; while statements related to development of spiritual awareness and self-understanding ranked lowest (M=3.7).

Table 4. Competences development effects: personal aspects.

	n	Agree	Neutral	Disagree	M <sup>a</sup>	SD
Improved my relationships with my peers.	74	89.2	6.8	4.1	4.3	0.9
Opened my mind to alternative approaches to living.	74	85.1	8.1	6.8	4.2	1.0
Helped me developing a connection with other “realities”.	74	85.1	6.8	8.1	4.1	1.0
Did not have a positive influence in my personal development. <sup>b</sup>	74	12.2	9.5	78.4	4.1	1.2
Made me feel happiness.	74	77.0	17.6	5.4	4.1	1.0
Provided me with a different perspective about life.	74	81.1	13.5	5.4	4.0	0.9
Improved my relationships with the faculty that traveled with us.	74	77.0	17.6	5.4	4.0	0.9
Enhanced my ability to take other people’s place.	74	79.7	10.8	9.5	3.9	1.0
Helped me better understand myself.	74	70.3	20.3	9.5	3.7	0.9
Did not provide me with a broader awareness of spiritual issues. <sup>b</sup>	74	16.2	23.0	60.8	3.7	1.2

<sup>a</sup>Scale ranged from “1 = completely disagree” to “5 = completely agree”.

<sup>b</sup>Reverse-scoring was performed.

Regarding professional development (Table 5), all statements had high levels of agreement, being the confirmation of their career path the one which ranked highest (M=4.5), while statements related to self-learning (M=4.1) and development of their research and analytical skills ranked lowest (M=4.0) but still above the neutral point.

Table 5. Competences development effects: professional aspects.

	n	Agree	Neutral	Disagree	M <sup>a</sup>	SD
Reaffirmed my decision of becoming a tourism manager.	74	93.2	2.7	4.1	4.5	0.9
Allowed me to know real cases of tourism problems.	74	95.9	1.4	2.7	4.4	0.8
Helped me become more critical when travelling in regards of the services and destination quality.	74	93.2	1.4	5.4	4.4	0.9
Gave me ideas for future tourism business/endeavors.	74	87.8	8.1	4.1	4.4	0.9
Did not have a positive influence in my professional development. <sup>b</sup>	73	11.0	4.1	84.9	4.3	1.1
Increased my knowledge in tourism management related topics.	74	89.2	2.7	8.1	4.2	1.0
Encouraged me to assume more responsibilities during the development of group projects.	74	87.8	5.4	6.8	4.2	0.9
Allowed me to better understand what was learned in class.	74	90.5	6.8	2.7	4.1	0.8
Did not motivate me to learn more on my own. <sup>b</sup>	74	16.2	2.7	81.1	4.1	1.1
Helped me develop my research and analytical skills.	74	85.1	8.1	6.8	4.0	0.9

<sup>a</sup>Scale ranged from “1 = completely disagree” to “5 = completely agree”.

<sup>b</sup>Reverse-scoring was performed.

## CONCLUSIONS

In both social and environmental awareness aspects it was observed that while fieldtrips did make these issues more obvious to them, they did not encourage them to get involved or have a more active role in the same manner, which is more prominent in social aspects. This may be caused by a variety of reasons, which could be both inherent to the trip itself or to the students' context and lifestyle. Therefore, factors that could be preventing students to get involved in volunteering and getting involved in hands-on social or environmental projects at this time require further research that will allow unveiling of this process.

Results from the personal development aspect confirm the problematic identified by Xie (2004) where fieldtrips are perceived by students as activities related to fun and friendship rather than educational opportunities. These findings can be useful for faculty from tourism related programs as they could lead to the incorporation of different educational tools before, during and after the fieldtrips to enhance their educational outcomes. Therefore, turning this apparent problem into a component that allows students to better engage in the learning process.

The high level of agreement on statements related to the professional development aspect confirms previous findings where fieldtrips are perceived as opportunities to have “trials” of professional life and contributions to their working experience (Goh, 2011). These findings suggest a great importance on the role of fieldtrips for tourism management students as they have the opportunity to explore destinations and better understand the particularities of their attractions, services, products, and overall development status while interacting with different stakeholders, community members and other tourists.

Caution should be applied when attempting to generalize these results as the characteristics of the sample, both from their context (e.g. South American country, private university, etc.) as well as demographic characteristics (e.g. mostly female), are unique. Nevertheless, it provides relevant information regarding the role that fieldtrips have and how they could be used in the learning process within tourism related programs.

Future research should aim to explore the relationship between these dimensions and students’ demographic characteristics and travel experience. This would allow faculty to have a better understanding of the true impact of fieldtrips in students and facilitate the attainment of learning objectives.

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# MARIJUANA TOURISM: RESULTS FROM AN UNDERGRADUATE INDEPENDENT STUDY

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## ABSTRACT

*Over the course of three semesters, five undergraduate students were recruited to contribute to a research project examining the phenomenon of Marijuana Tourism in Colorado. Students were responsible for research tasks such as: literature reviews, conducting interviews, transcribing interviews, developing survey instruments, administering surveys, and data entry. While undergraduate research is not uncommon, the novelty of the research topic and the volatility of the industry created a research environment where students encountered unusual obstacles that had to be overcome. The results of qualitative interviews revealed that business owners and managers of recreational marijuana operations encounter diverse challenges in areas such as: industry regulations, maintaining competitive advantage, staffing and training, safety and security, marketing, and community support. The results of a survey that was administered to 325 recreational marijuana customers including both tourists and local residents provides insight into the development of a customer demographic profile, their behavioral history, purchasing, information search, and motivations. This study is an early step contributing to the understanding of the recreational marijuana industry which has only been legal in Colorado since 2014. Future research must continue to investigate legal marijuana tourism in the United States as the industry grows and changes.*

**KEYWORDS:** marijuana tourism, undergraduate research

## INTRODUCTION

Legal sales of recreational marijuana began in Colorado on January 1, 2014. However, constantly changing regulations caused openings in many areas throughout the state to be delayed, including the region in southwest Colorado where many months passed before shops were open for recreational sales. During the transition to legal recreational sales, many meetings of leaders in the tourism industry were plagued with unanswered questions about the management and impacts of marijuana tourism, a phenomenon which had yet to be studied in a legal context in the United States. To help answer those questions, an application to research marijuana tourism through a case study approach was submitted to the Institutional Review Board (IRB) of a public liberal arts college in the region. Included in the IRB application were undergraduate students who expressed interest in better understanding the research topic. Through Spring 2014, Fall 2014, and Spring 2015, five students contributed as researchers by enrolling in an independent study focused on the topic of Marijuana Tourism.

## **Spring 2014**

The IRB application was pending approval in Spring 2014. During the review, many questions arose related to participant confidentiality and possible risks for participating. While the application was going through the revision process to address those issues, there was significant interest from one particular student before IRB had approved for primary research so the independent study began with this student conducting a literature review. The student encountered many challenges with the lack of information associated with marijuana tourism in a legal context. Academic articles from respected journals related to tourism were difficult to find and when they were identified they were often associated with drug tourists in international locations with varying degrees of legality towards the purchase and consumption of marijuana (MacCoun, 2011; Uriely & Belhassen, 2005). In order to better understand the history of legalization of marijuana and the stakeholders involved in the process, many information sources were found from popular media in terms of newspaper articles, magazine articles, or television documentaries. The student provided a report synthesizing the existing literature and created a PowerPoint presentation highlighting key points from the report.

## **Fall 2014**

Two new students from the Tourism and Hospitality Management major chose to take the independent study on Marijuana Tourism for elective credits. IRB approval was received for two segments within the study. There was a qualitative segment that set out to interview managers and owners of the recreational shops to better understand their experience of transitioning from medical sales. There was also a quantitative segment that set out to survey customers of the recreational shops including local residents as well as tourists. The progress during the semester was slowed by delays in the regional shops opening. Initially the geographical region for the study was identified as a single county, but as recreational shops began opening first in neighboring counties, those shops were contacted and invited to participate.

For the qualitative segment, the students participated in an interview. They were able to follow along with the list of potential questions following Seidman's (2006) three interview structure. The students were also able to ask impromptu questions of the owner once the planned questions were complete. The interview was recorded and afterward, students transcribed the audio file into a document to be used later for analysis.

For the quantitative segment, the students contributed to the creation of the survey instrument including participation in the process of scale development. The scale was designed based off of a qualitative study of drug tourism (Belhassen, Santos, & Uriely, 2007). Students identified key themes in the qualitative findings and created a list of quantitative items associated with the responses for each theme. The draft of the scale was sent to the first author for feedback and then provided to a group of undergraduate students who were familiar with the topic from taking a course on the economics of crime. The scale was reviewed in both stages for face validity. Based on the responses, the scale was finalized into four items for each of four dimensions of motivations for

drug tourism. The survey instrument included this scale as well as questions related to demographics, past behaviors, spending, and motivations. Due to the delayed openings, students were limited in their efforts to administer surveys and collect data, however, they did create a data file and code book for future surveys to be entered.

## **Spring 2015**

Two new students enrolled in the independent study. Many of the qualitative interviews had been completed at this point so their only responsibilities for this segment were to review and edit the transcripts. Their main focus for the semester was on survey administration and data collection. An initial obstacle that was encountered was that two of the shop managers felt uncomfortable with the students administering the survey on property. Many customers are already apprehensive about entering a recreational marijuana store and managers felt more comfortable with having a “survey station” set up and employees of the shops would recommend the survey to their customers. The students were able to witness and appreciate the reliability and validity issues that were introduced to the study with the inconsistent administration of the surveys. Students also quickly found that surveying in person was not without its challenges as the volume of customers would vary dramatically during different times of the day, day of the week and around holidays. Also, during the period of data collection, multiple shops in the region were robbed because the industry is known for its cash transactions. The safety issues created challenges with increased resistance to the study from shops that had previously agreed to participate. On several occasions, a student would arrive to administer surveys during a time period that had been approved by the owner and be turned away because shift supervisors at the shop were concerned that surveying introduced an external variable that would unnecessarily complicate their operation. Not all of the impacts on the study from safety concerns were negative. One shop hired a security guard to stand at the entryway during all operating hours and this security guard was supportive of the research study and would help suggest to customers that they should participate in the survey. The students felt that their response rate improved because of the recommendation from an employee with a physical presence in the survey area. Students were able to navigate the challenges associated with safety and security and over the course of three months in February, March, and April of 2015, they collected, coded, and entered 325 completed surveys from five regional shops.

## **RESULTS**

### **Qualitative Findings**

Six interviews were conducted of owners/managers of recreational marijuana shops. Interviewees had in common that their shops were all in the southwestern region of Colorado and had all been selling marijuana through a medical license before applying for the recreational license. Despite being from the same geographical region, interviewees were from three different counties and regulations at the county level influenced their management decisions. Another difference was that two of the six interviewees did not feel comfortable having their voices recorded during the interview

and refused to participate if recording devices were used. Transcripts of those two interviews were developed from copious note-taking while the other four interviews were transcribed from voice recordings. While all of the shop owners/managers wanted to contribute to the understanding of the novel industry, the contentious nature of the research topic caused some interviewees to be uncomfortable with the data collection methods and these inconsistencies were a limitation of this study causing potential validity and reliability issues with the data analysis.

Transcripts were uploaded into MAXQDA which was the software tool used for coding the data. Themes were developed to organize topics that were consistently found in the comments. Common topics that emerged during the interviews were how the owners/managers conducted their business with concern for: industry regulations, maintaining competitive advantage, staffing and training, safety and security, marketing, and community support.

### *Industry regulations*

Interviewees consistently reported that a considerable challenge for their operation was that laws and regulations are constantly changing. Since January 1, 2014, owners/managers had to make adjustments for changes in regulations to packaging, dosages and potency, inventory tracking, testing, and labeling. Many interviewees accepted the changing regulations as a cost of doing business in a new industry.

While I can't fault the government for continually adjusting the rules (they're figuring it out too), the consequences for not keeping up with them are so great that if you miss something small, it can mean big things in a bad way. (#6)

There seemed to be some agreement that the changing regulations helped keep competition down because the industry had huge barriers to entry and even those who made it through "a lot of hoops to jump through" to open the business would stumble with "the hardest part is complacency and all kinds of things change with rules and labeling and security" (#1). The constantly changing regulations in the industry created a natural selection process that would not allow competing business to survive unless they were serious about staying up on "the compliance piece of making sure you're 100% up to date with all state laws all the time" (#2).

### *Maintaining competitive advantage*

The interviewees consistently reported their concern with a growing number of competitors and had felt the impact when new shops open for recreational sales, "They have hit us hard and we've felt the blow already. Almost instantly our sales were cut in a third of what they were initially" (#1). There was a trend in that interviewees felt that, "Shops stay competitive by location, convenience, and reputation" (#3) but there was also considerable effort put forth in terms of product quality and customer service. Businesses feel they stay competitive because "We've got the best looking product, and we've got a lot of it, and we put it on our shelf" (#4). As a point of healthy competition, a manager

from a different shop states, “We pride ourselves on having the best flower in town. We carry more strains than anybody on our shelves and that is part of what makes us successful” (#5).

Interviewees shared that, “Quality combined with good customer service is what helps us be successful” (#4). Another shop owner says that product quality is not a distinguisher between shops because, “No matter where you go the quality is good so I think we stand out because of our customer service and our atmosphere” (#2). Stores seemed to compete on their ability to build relationships with the customers, “One of the biggest things here at our store that people comment on is our customer service and the knowledgeable staff” (#5).

Ideally, all existing shops could stay in business because “We’ve all found different niches and specialize in different things” (#6). Interviewees felt more threatened at the prospect of competing against businesses with extraordinary resources, “We have reason to believe that one of the largest marijuana conglomerates is going to move into town” (#2).

### *Staffing and training*

Excellent customer service contributed to the success of the business and interviewees were conscious of the value of good employees.

I try to pick people out that are going to give customer service because not everyone is a customer service person. I hire people that I’d probably want to sit in a car with for hours, that are nice, and that are friendly and good to the people who come in the store. We really want people to be treated well. (#5)

Another consistency was that there is surprisingly low turnover in the hourly staff. “It is really hard to have turnover in this business because everyone has to go get a state badge” (#5). Obtaining a badge is enough of an investment that it, “Keeps out the kids who are like, ‘I’m going to work in a weed store!’” and “Brings in people who want to see the marijuana industry excel” (#4).

A staffing trend was that interviewees saw their employees as important resources and would invest in them. “We try to make this a great place to work by appreciating the time and energy our staff put forth. We also offer partial health care coverage after a year” (#6). In addition to benefits, staff members are encouraged to play an active role in the success of the business, “Our staff is trained and empowered to make decisions” (#3). Another shop strives to make resources available to the employees, “We instill such self-education in our people and I worked on putting together a pretty extensive staff library that people can access” (#4).

### *Safety and security*

A unique operational challenge in the industry is protecting the product and the employees from security threats. During the interview period, several local shops were robbed at gunpoint. Interviewees were taking proactive safety measures as a reaction to the robberies. “We have begun extensive training on safety and security and we need to educate the staff on how to use the panic button” (#3). Despite the threats, interviewees were confident in their security systems, “We have way more cameras than I’m sure is legally necessary” (#4). Another owner reflected on being robbed afterhours.

They burglarized 19 businesses in town and I knew they were going to come up here sooner or later. The good news is our enhanced security system caught them so everyone was happy because they had already done 19 businesses. (#1)

### *Marketing*

The interviewees consistently saw marketing initiatives as fundamental to their success though regulations specific to marketing were seen as limitations, “Our compliance officer says that advertising out of state is an issue” (#4). Interviewees must also consider the target audience when making decisions about which media to buy, “We advertise now with newspapers and we are getting ready to do TV and radio. I’ve gotten letters from them say that not more than 30 percent of their market is under 21” (#5). Another regulation is related to the limits on logo use and signage, “You can’t use the marijuana leaf or the green cross in promotional material. You also can’t promote your sale or give prices” (#3). One owner tried to get his business name added to, “One of those nice blue signs on the road but the state didn’t want anything to do with it” (#1). While not a formal regulation, shops from one county did not get promoted at local welcome centers, “The tourism office is not really interested in promoting it so people don’t know where to go to ask” (#2). Despite the use of traditional marketing channels, “The bulk of the people of who show up here, show up via the internet and my website” (#1).

Despite the challenges with restrictions, the interviewees use creative marketing initiatives to maintain competitive advantage.

We have implemented an outreach to vets and offer 10% off for purple hearts. We like to give back to the community and are planning on sponsoring events like a tough mudder. We offer specials for holidays like the green love potion for Valentine’s Day. (#3)

Another manager also expressed interest in being involved with local events, “I do so much public relations stuff and I’m trying to figure out if its legal for us to enter the Cannabis Cup which is the marijuana version of a beer competition” (#4).

### *Community support*

Interviewees expressed varying degrees of support from the local community as would be expected from representatives of three different counties. Managers are aware of the importance of maintain positive relationship with local residents.

The business image we've worked to develop has been one focused on community outreach and education. We were present at town council meetings and tried our best to be available for questions and providing honest answers outside of the propaganda. (#6)

Several interviewees indicated that they have not had any issues with the public perception of the industry but perhaps it is because, "I live in a bubble of a lot of support because we're down in the shop every day" (#5).

Other interviewees commented on the challenge of maintaining those positive relationships, "One of the biggest challenges is the lack of education that results in stereotypes about the industry" (#3) and "The biggest challenges are related to local politics so if you want to get into this business you should pick a place where people are friendly and the voters are behind you" (#2). There was generally an optimistic outlook for the future.

We are seeing a different population of people sitting on the city council, but I think that we will see even more of a shift as we see some of those older people move out, and some of those business interests move out, and see some new, younger faces. (#4)

### *Tourism segment*

While the interviews often spoke of their customers as an aggregate, questions probed into tourists as a specific target market. Regulations are stricter for the amount of marijuana that tourists are able to purchase compared to local residents, "What shows on their receipt is a non-Colorado resident. The reason for that is the limit on grams they are allowed to have" (#1). It is also illegal to take the products over state borders. One owner includes this information in their marketing materials, "I put kind of a disclaimer in there saying that crossing the borders is illegal" (#1).

Tourism is a very seasonal industry in southwest Colorado and interviewees agreed that their tourist market would fluctuate with the seasons.

It definitely depends on the time of year. During our off season the majority of our business is locals. During our on season and especially peaking during festivals and holidays, I would say 65% of our business is out-of-state customers. (#6)

That figure is inconsistent though as one owner indicates that, "Being a border community, only one out of six of our customers comes from Colorado" (#1) and another

interviewee reports that, “25% of our business is locals from town or the general area” (#2).

When asked about tourists’ motivations for coming to Colorado, interviewees all said that marijuana is not the only reason why they visit, “Tourists are not deciding to come only for marijuana but see it as one of the benefits, similar to Amsterdam, where it is one of the reasons they choose Colorado” (#3). Many interviewees made similar comments.

We definitely get people who stop, who wouldn’t have stopped, for marijuana on their way to other places. It’s rare that people come here solely for marijuana. They’re here to go mountain biking and want marijuana; they’re here to go skiing and want marijuana. So maybe they chose us over Utah. Maybe they chose us over northern California. Maybe they chose us over another location, but they’re coming here to do something else and marijuana is probably the icing on the cake that brought them here. (#4)

Interviewees are hopeful that the region will eventually become friendlier to marijuana tourism in terms of infrastructure and perceptions. Marijuana tourists are gradually having more options in the area and, “There is a new marijuana tour company opening and a couple marijuana friendly hotels” (#4). Local support has been varied as some interviewees are from a county with welcome centers that feature information on the shops and others are in a county where, “The visitor center seems embarrassed by it but they can’t deny people walking in of the information. Why don’t they give the people what they want?” (#1). Public perceptions of purchasing and consuming marijuana may be shifting too, “Cops are going to get tired of giving people marijuana tickets and that’s going to change things. I think someday we will have tourists on Main Street hitting bong” (#4).

## **Quantitative Findings**

Survey participants were intercepted at five recreational marijuana shops in southwest Colorado. Three of the shops allowed the student researchers to stand outside and administer surveys to customers who were leaving the shops after making a purchase. Owners/managers of two of the shops were uncomfortable with the presence of a student researcher and only agreed to participate in the study by designating a place in the lobby for a survey station where blank surveys would be provided and employees of the shop would recommend to customers that they fill out a survey. The findings of 325 surveys are reviewed below but should be interpreted within the scope of limitations resulting from the reliability and validity issues caused by inconsistent administration of the surveys and selection of the participants.

### *Demographic profile*

Profiles of local residents and tourists were created to determine if any differences existing between the groups. Findings for the analysis of age (Table 1) revealed that

tourists were older than local residents with fewer customers in the youngest age groups though the findings were not significant ( $\text{Chi}^2=8.999$ ,  $p=.532$ ). There was also no significance ( $\text{Chi}^2=2.016$ ,  $p=.569$ ) in the difference between gender as both groups were composed of approximately 70% male customers (Table 2). There was a significant difference ( $\text{Chi}^2=22.859$ ,  $p=.007$ ) in the makeup of occupations with more tourists employed as laborers and in education while more residents were employed in management or professional industries (Table 3).

Table 1: Age profile

	21-25	26-30	31-35	36-40	41-45	46-50	51-55	61-65	66-70	71-75	76-80
Tourists N=164	39	27	24	12	17	7	17	12	7	2	0
Residents N=156	47	31	21	14	11	7	8	11	4	5	1

Table 2: Gender profile

	Male	Female
Tourists N=165	116	48
Residents N=158	112	45

Table 3: Occupation profile

	Retired	Management	Service Industry	Student	Laborer	Education	Professional	Unemployed
Tourists N=154	10	0	36	12	38	12	21	13
Residents N=156	12	8	48	15	28	7	27	9

### *Behavioral history*

To understand the customer history with the product, customers were asked if they had purchased legal recreational marijuana previously and how often they use marijuana products. Results indicate that the history of previous purchases was significantly different ( $\text{Chi}^2=4.275$ ,  $p=.039$ ) for tourists and local residents as tourists were less likely to have purchased legal marijuana in the past (Table 4). There was no significant difference ( $\text{Chi}^2=8.665$ ,  $p=.371$ ) in the frequency of marijuana use between tourists and residents as customers in both groups were mostly likely to be daily users (Table 5).

Table 4: Previous purchases

	Purchased previously- Yes	Purchased previously- No
Tourists N=165	88	77
Residents N=160	67	93

Table 5: Frequency of use

	Every day	Few times/ week	Few times/ month	Once/ month	Once/ few months	Few times/ year	Once/ year	Once/ few years	Never
Tourists N=165	100	31	19	3	5	1	1	3	2
Residents N=159	103	33	19	1	1	0	0	0	2

### *Purchasing*

Customers were asked which marijuana products they bought and how much they spent on their purchase. Edibles were the only product category that was significantly different ( $\chi^2=8.643$ ,  $p=.003$ ) between tourists and local residents as tourists were more likely to purchase edibles (Table 6). Spending was significantly higher ( $F=5.297$ ,  $p=.022$ ) for tourists who spent an average of \$103.87 compared to local residents who spent an average of \$64.24 (Table 7).

Table 6: Product categories

	Bud	Hash	Edibles	Tinctures	Topicals	Concentrates
Tourists N=165	140	26	57	4	10	14
Residents N=160	140	15	32	3	6	12

Table 7: Spending

	Min	Max	Mean
Tourists N=154	\$10	\$500	\$103.87
Residents N=157	\$3	\$400	\$64.24

### *Information search*

Customers were asked which information sources they used to find the shop and what attributes of the shop made them choose that one shop over the others. Tourists and residents used significantly different ( $\chi^2=44.292$ ,  $p=.000$ ) information sources as tourists were more likely to use the Internet while residents were more likely to use word of mouth or newspapers (Table 8). None of the search attributes were significantly

different as tourists and local residents feel similarly about the importance of location, price, service, quality, reputation, and product availability (Table 9).

Table 8: Information Sources

	Internet	Word of Mouth	Newspaper	Radio	Other
Tourists N=160	79	75	6	0	0
Residents N=150	24	105	14	1	6

Table 9: Shop attributes

	Location	Price	Service	Quality	Reputation	Product availability
Tourists N=164	108	40	50	46	39	24
Residents N=156	92	46	60	59	43	20

### *Motivations*

All customers were asked how much they agreed (1-strongly disagree to 7-strongly agree) with statements about their general motivations for visiting the shop to make a purchase. The strongest motivation ( $\bar{x}$ = 5.35,  $s$ = 1.982) to purchase from a recreational shop was “I wanted to access to safe products that have been tested” (Table 10).

Table 10: Customer motivations

	N	Min	Max	Mean	SD
I wanted to be one of the first to purchase it legally	310	1	7	4.04	2.152
Since it is legal now, I might as well try it	306	1	7	3.88	2.163
I have nowhere else to purchase it	307	1	7	3.39	2.195
I wanted access to higher quality products	307	1	7	5.31	1.870
I wanted to access to safe products that have been tested	308	1	7	5.35	1.982
I wanted to purchase it to make a political statement	306	1	7	3.85	2.349

Tourists were asked how much they agreed (1-strongly disagree to 7-strongly agree) about their motivations in an additional scale that was developed with four items per theme for four themes emerging from qualitative research on international drug tourists (Belhassen et al., 2007). While preliminary results from Exploratory Factor Analysis reveal that further revisions of the scale are necessary, results from the first round of data collection (Table 11) indicate that the two strongest motivations for tourists to purchase recreational marijuana while traveling are “This is an outcome of my free choice” ( $\bar{x}$ = 5.74,  $s$ = 1.740) and “This place is a ‘must’ for marijuana users” ( $\bar{x}$ = 5.44,  $s$ = 1.783).

Table 11: Tourist motivations

Theme/Statement	N	Min	Max	Mean	SD
<b>Experimentation</b>					
When I am traveling I am more open to new experiences	158	1	7	4.87	1.888
I feel like I can give into temptation when I travel	159	1	7	3.35	1.997
I feel like this is the right place to try it	159	1	7	5.07	1.839
It is legal here so it is safer than at home	158	1	7	5.22	2.002
<b>Pleasure and Diversion Seeking</b>					
I wanted to escape the boredom of my real life	159	1	7	3.70	2.002
I see it as a part of the fun-seeking on vacation	158	1	7	4.15	2.102
I am seeking pleasure experiences on vacation	159	1	7	4.36	2.069
I chose this destination because it is legal here	158	1	7	5.09	1.946
<b>Quest for Authenticity</b>					
This place is a “must” for marijuana users	160	1	7	5.44	1.783
I want to be in company of other marijuana users	159	1	7	4.19	2.121
This is an outcome of my free choice	159	1	7	5.74	1.740
I wanted to try it here at least once in my life	158	1	7	3.94	2.170
<b>Accessible Purchasing</b>					
I don’t want to take the risk of being caught at home	158	1	7	3.59	2.183
It is easier to access than at home	159	1	7	5.03	2.039
I don’t want to be associated with marijuana in my hometown	159	1	7	3.48	2.175
I don’t want to deal with drug dealers in my hometown	159	1	7	4.65	2.211

## CONCLUSION

The legalization of recreational marijuana has created the need for research to better understand the industry, its management, and its customers. Undergraduate students were able to contribute to this research study in the format of an independent study course. Students made contributions to the development, administration, and analysis of two segments of the study. Their involvement in qualitative interviews resulted in a better understanding of how owners and managers are navigating issues with industry regulations, maintaining competitive advantage, staffing and training, safety and security, marketing, and community support. The students’ involvement with quantitative surveys resulted in the development of a customer profile for local residents and tourists, and a better understanding of their behavioral history, purchasing, information search, and motivations. While this study encountered challenges that may have resulted in data that should be interpreted conservatively, the findings are still an important first step in the body of knowledge that will soon follow about the marijuana tourism industry.

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# HOW TEACHING EMOTIONAL INTELLIGENCE BECAME A 7 YEAR ASSESSMENT PROJECT

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## ABSTRACT

*Emotional intelligence pertains to intra and interpersonal skills. Those who have higher EI perform better at work. Therefore, there is support for including emotional intelligence in tourism and hospitality curricula. This is one example of such endeavor. Students were given a pre-test, then emotional intelligence lessons were incorporated into a class, followed by a post-test. The study expanded over several years and became an assessment process.*

**KEYWORDS:** assessment, emotional intelligence, tourism and hospitality education

## INTRODUCTION

Tourism and hospitality educators have shown an increased interest in emotional intelligence (EI), probably because the topic has lots of potential for addressing issues in the industry. A study has shown that tourism and hospitality managers with high EI leads to better employee and customer satisfaction, as well as higher profits (Langhorn, 2004). Therefore, it would seem pertinent for tourism and hospitality faculty to help students try to increase their EI in order to be more successful managers.

Mayer and Salovey (1997), who are credited with creating the concept of emotional intelligence, define it as “the ability to perceive emotions, to access and generate emotions and emotional meanings, and to reflectively regulate emotions in ways that promote emotional and intellectual growth” (p. 5). Emotional intelligence has been studied in various tourism and hospitality settings such as full service hotel employees (Jung and Yoon, 2012; Lee, Magnini, and Kim, 2011), flight attendants (Hochschild, 1983), private club managers (Cichy, Cha, and Kim, 2007), casino dealers (Prentice and King, 2010), and tour operators (Cavelzani, Lee, Locatelli, Monti, and Villamira, 2003). Scott-Halsell et al. (2007) studied college undergraduate hospitality students to gauge their emotional intelligence level and the transformational leadership skills they obtained, as the indicator for their future job success.

I have always been intrigued by the idea of the scholarship of teaching and learning. I enjoy teaching and I enjoy conducting research; however, I was not sure how I could conduct research on my teaching, nor was I sure that I wanted to find out if my teaching was effective or not. However, my passion for the concept of emotional intelligence, led me to embark on an adventure to assess whether students could improve their EI or not. This paper is a story about my reflection of teaching EI to hospitality & tourism students over the past several years.

The project served a dual-purpose, in that, higher education administrators, parents and industry representatives want more proof of the value of graduating from college and it was an exploration in the scholarship of teaching and learning. I was not sure what assessment was or how to assess student learning. After suffering through several years of writing assessment reports for university committees and studying the topic, I finally started to understand a little bit about assessing student learning. There are various kinds of assessments: course and program assessment, direct and indirect measures, formative and summative evaluations, just to mention a few (Allen, 2004). And, there are many ways to conduct assessment, such as national exam pass rates (i.e. registered nurses licensing exam), some programs use job placement rates for program assessment, and faculty could use a knowledge pre-post test model for student learning in a course. This project used a pre-test, intervention, and post-test model to assess students' emotional intelligence, since EI is linked with tourism and managers' success.

## METHODOLOGY

While attending an ISTTE conference in 2004 in Hong Kong, China SAR, I attended a presentation on the EI of chefs. I was captivated by the concept of EI and what it could mean for hospitality and tourism education. After the conference, I delved into the topic, studied many models of EI, attended a certification program for the Bar-On EQ-i assessment in 2005 (which made me eligible to purchase and administer the EQ-i, along with providing EI teaching materials).

The Bar-On EQi (1997) was used to assess students' EI; it has 133 questions that are used to provide an overall EQ scores, as well as five categories: Intrapersonal, Interpersonal, Adaptability, Stress Management, and General Mood. This was a pre-test administered at the beginning of the semester (Fall 2006). Then, I incorporated EI lessons into the class. The EI lessons started with information about the definition of EI and some of the research demonstrating the potential value of EI in the workplace. Activities were used to further advance the discussion of EI, for instance pictures of peoples' faces were shown and students had to describe possible emotions the people might be feeling, along with discussions of emotionally charged scenarios from hospitality and tourism work experiences. Other discussions and activities related to emotional self-awareness, self-regard, empathy, adaptability, optimism and stress management. A total of five short lessons were incorporated throughout the semester, followed by a post-test at the end of the semester. After data were collected an analysis was done and there was no improvement in the students' EI scores (see Table 1). To try and improve my teaching methods I read more research on EI.

Year 2 (2007) of the project included the same methods, a pre-test, EI lessons and post-test. The results showed no significant increase in the EI score (however, at least the scores went up this time, as opposed to the decrease from last year). Also, I acknowledged that Bar-On (1997) recommended at least 6 months between the pre and post-tests, to allow participants time to make meaningful changes in their behavior. So, a follow-up assessment was added to a capstone course. There was no significant increase

in the scores (see Table 2); however, the sample size was small (n=20), so I decided to persist with the project. To try and improve on my teaching methods, I attended the Multi-Health Systems (MHS) International conference on EI in Chicago (2008). With new hope, I continued the EI pre-test, lessons and post-test for Year 3 (2008). However, I quit doing data analysis on a class by class basis, due to disappointment and no desire to see a lack of improvement.

Table 1. Paired T-tests for Total EI scores

Year	n	Total EI Means			
		Pre-test	Post-test	t	p
2006	51	93.43 (12.95)	91.65 (14.22)	1.338	0.253
2007	43	98.93 (11.03)	100.56 (13.37)	1.702	0.199
2008	48	96.69 (11.06)	95.98 (11.80)	0.408	0.526
2009	54	94.35 (11.55)	95.15 (11.78)	0.606	0.440
2010	48	95.94 (11.06)	96.17 (12.94)	0.043	0.837

Based on my strong belief in the value of EI, I kept teaching the concept, as well as conducting the pre-, post-test and follow-up. After seven years (2006-2012) of data collection (n=77), there was no significant increase in EI among the HTM students from the introductory course pre-test to the follow-up test in the capstone course. How could this be? The results were discouraging. Then, I read some articles on the difference between people with high and low EI. The median for the EI scores was 99. The data were divided as those scores 99 and below where the low scoring group and those scores 100 and above were the high scoring group. After dividing the students' scores into the two groups analysis was conducted and there were significant increases in EI among the students who started with lower EI scores. The good news was that the students who needed to learn about EI the most were able to improve their EI scores over time.

Table 2. Repeated measures EI scores

Categories	Total EI (SD)		
	Pre-test	Post-test	Follow-up
First year of follow-up (n=20) F = 20.805, p=0.463	95.90 (12.95)	96.00 (12.19)	98.10 (12.44)
Combined classes (n =77) F = 2.204, p=0.139	97.79 (10.90)	98.331 (10.66)	99.65 (10.58)
High-Low comparison			
Low (n=39)	89.59 (7.79)	91.87 (8.80)	93.85 (9.73)
High (n=38) F = 3.495, p=0.035	106.21 (6.15)	104.92 (8.10)	105.61 (7.79)

## DISCUSSION

Based on the result, I continue to teach EI to students. Now I focus more EI by utilizing more lessons on the concept and teach it in smaller classes. Some of the teaching methods include more individualized and self-reflection techniques. The students use a text "The Student EQ Edge" (Stein, Book & Kanoy, 2013), which has case

studies, scenarios and reflection questions. Of course there were some limitations to the study, it is not known if all the students were present during all of the EI lessons in the introductory course. Also, the research took place at one university. Future studies could see if other tourism and hospitality programs had similar results. More research is needed to assess the best techniques for teaching EI.

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