Managing online communications and feedback relating to the Welsh visitor attraction experience: apathy and inflexibility in tourism marketing practice?

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DECLARATION

This work has not previously been accepted in substance for any degree and is not being concurrently submitted in candidature for any degree.

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Abstract

Understanding of what constitutes a tourism experience has been the focus of increasing attention in academic literature in recent years. For tourism businesses operating in an ever more competitive marketplace, identifying and responding to the needs and wants of their customers, and understanding how the product or consumer experience is created is arguably essential. The impact of user generated content (UGC) and online reviews in the tourism sector has captured the attention of academics, yet the focus has been mostly on the accommodation sector. The application of online social media sites such as TripAdvisor and Facebook by visitors to attractions and, particularly, by attraction operators has seemingly received little academic attention to date. This thesis sets out to gain a critical insight into Welsh visitor attraction operators' understanding of the visitor experience, and their practices in relation to managing online communication and feedback. It uses a three-phase methodological approach to investigate attraction operators' understanding of visitor experience; to critically analyse their opinions on the use of social media by themselves and their publics; and to identify the online co-creation of visitor experience for selected visitor attractions in Wales. A combination of research methods was used: online questionnaires with eighty-one Welsh attraction operators; sixteen semi structured interviews with Welsh visitor attraction operators; and a netnographic review of the digital 'footprint' of eighty-four Welsh visitor attractions.

It is found that the online co-creation of experience for Welsh visitor attractions is predominantly visitor-led, and that supply-side interaction is lacking in the feedback and communication process. It is apparent that many Welsh visitor attraction operators are missing a key marketing opportunity to develop their online presence and exploit the interactive communication opportunities offered by Web 2.0 and social media. The findings contribute to theoretical understanding of co-creation of experience, and online interactions between suppliers and consumers in a tourism context. The management implications of apparent apathy or indifference and inflexibility in the marketing practices of many Welsh visitor attractions are considered.

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Chapter 1

Introduction

1.1 The impact of online social media developments on visitor attractions

The impact of new technologies and especially Web 2.0[1] on tourism planning and consumption has been dramatic (Fotis *et al*, 2012). Electronic word of mouth (eWOM) has been able to *"positively influence the destination image, tourist attitude and travel intention"* (Jalilvand *et al*, 2012, p 134), and museum websites, for example, have been replaced, as "*the Web as a two-way multi-sensory communications environment takes their place*" (Bearman and Trant, 2007 p 10). For marketing, the digital dimension means that although there have been tactical level shifts, on a strategic level the core issues have arguably stayed the same: positioning; creativity; insight; and engagement (Ritson, 2015). Given these observations, it remains crucial for visitor attractions to engage fully in the marketing process in order to attract and retain new and repeat visitors. With user generated content[2] (UGC) growing in popularity and online review sites such as TripAdvisor[3] demonstrating global reach and massive impact on tourism (Zeng and Gerritsen, 2014; Munar and Jacobsen, 2014; Kladou and Mavragani, 2015), there are some fundamental marketing reasons for visitor attractions to secure these digital opportunities. As Neuhofer *et al* (2013 p 550) note:

> "*in order to enhance tourism experiences, it will be crucial for businesses to extend their sphere of activity to the virtual space to intensify engagement, extend experience co-creation and offer a higher value proposition to the tourist in the online world*"

A simple definition of what constitutes a visitor attraction is that they are *"natural locations or features, objects, or man-made constructions that have a special appeal to tourists and local residents*" (Robinson, 2012 p 185). However, it is acknowledged that, as with most definitions in tourism, this is not without challenge, debate or contestation (see Section 1.3). For reasons of

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[1] Web 2.0 is a term used to cover the way that the possibilities of on-line interaction have developed a new kind of consumer, that is more involved in the process of interaction by helping to create and add value to online content (Garcia-Barriocanal et al, 2010).
[2] All forms of online media such as blogs, discussion forums, posts, chats, tweets, images, that are created by users of a system (Rowley, 2008)
[3] TripAdvisor – the largest travel community in the world, with 435 million reviews and opinions covering more than 6.8 million accomodations, restaurants and attractions. The site operates in 49 country markets worldwide (www.TripAdvisor.co.uk/aboutus accessed 26/02/17)

consistency and comparability (see Chapter 2) the definition of a visitor attraction that has been adopted for this PhD study is the one currently used by Visit Wales, and which was agreed upon by the four U.K. National Tourist Boards in 2001 to define a 'visitor attraction'. That definition is more detailed and emanates from the supply-side or business side (in line with Smith's 1991 cogent arguments over defining tourism per se*)*. Thus, a tourist attraction is somewhere:

> "*where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from the visitors*." (Welsh Government, 2014a p.4)

Empirical analysis of UGC has tended to concentrate on other areas of tourism, with scant work carried out in the attractions sector (Leask *et al*, 2014). One exception is a study of Greek museums and their use of social media (Theocharidis *et al*, 2014), but it appears that overall, attention has predominantly focused on guest reviews of hotels and other forms of accommodation (Garcia-Barriocanal *et al*, 2010). For these businesses, as well as for restaurants, TripAdvisor is well-established and seen as a generally trustworthy and significant source of eWOM[4] (Jeacle and Carter, 2011; Neuhofer *et al*, 2014). The effect that TripAdvisor can have on a tourism business can be direct and immediate, and both positive or negative. It is well-documented (Bassig, 2016) that positive reviews can lead to an increase in business reputation and revenue, whereas unchallenged negative reviews, for example may result in a loss of clientele (ITB Berlin, 2014). The use of eWOM and sites such as TripAdvisor would appear to be enduring, presenting a series of related business issues pertaining to the digital

[4] eWOM is the personal influence of consumers on others through recommendations in an online context (Markey *et al*, 2009). eWOM is covered in greater detail in Section 2.15.4

environment that need to be addressed by operators and other bodies involved in tourism, including visitor attractions (Munar and Ooi, 2012; Scott and Orlikowski, 2010).

1.2 Purpose and rationale for the study

Growth in online social media engagement provides an argument for increased attention to be paid to this phenomenon in the context of tourism, especially given the intangible and individualised nature of the tourism experience. With respect to the sector focus of this PhD research, as highlighted in the literature review presented in Chapter 2, there have been some notable omissions or research gaps in the academic study of visitor attractions. In particular, it may be argued that the application of the marketing process to the management and development of attractions and the visitor experience, especially online, remains a neglected academic research area. Particularly, in response to this, one of the key starting points of this PhD study was to identify and critically review the type of UGC relating to Welsh visitor attractions. The impetus for this was a desire to explore and gain a deeper understanding of the responsiveness of visitor attractions to online visitor interactions (namely comments, feedback, and reviews relating to post-visit experiences), in the context of 'experiencescape'[5], still a neglected concept in the study of visitor attractions. Visitor attractions in Wales were selected as the focus for the study because of the researcher's personal and professional interest and experience in this sector (see Chapter 3).

The overall aim of this PhD thesis is:

> To develop a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience.

The specific research objectives are:

1. To provide an updated review of the Welsh visitor attraction landscape;
2. To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool;

[5] This was an extension of Bitner's (1992) 'servicescape', which relates to an environment controlled by the provider. The tourism 'experiencescape' (O'Dell, 2005) differs in that it can include a variety of products and offerings from more than one supplier, as well as a series of different 'scapes' linked more to the human body's senses, rather than the traditional approach of much tourism literature which has focused on the visual aspects of sightseeing (Mossberg 2007). This is investigated further in Chapter 2.

3. To explore Welsh visitor attraction operator engagement with online communications and feedback relating to visitor experiences.

The initial stage of this PhD research synthesised available information on visitor attractions from secondary sources and provides an analysis of the number and type of attractions in Wales in 2015 (see Chapter 3). This was important as a scoping exercise that enabled the researcher to direct the sampling for the first phase of the primary research which utilised an online survey method directed at visitor attractions in Wales. The focus at this stage was on marketing processes and awareness and employment of marketing techniques. Subsequently, the second phase of the primary research involved semi-structured interviews with Welsh attraction owners and operators to explore in further depth the extent to which visitor experiences were measured or evaluated and how this informed promotional activity. The third phase of the research identified and examined online communication channels (namely visitor attraction operator websites and online UGC reviews) relating to Welsh visitor attractions, together with any associated comments and feedback emanating from the attraction operators, specifically focusing on TripAdvisor and Facebook[6]. During the early stages of this PhD research other social media channels such as Snapchat (2010) and Instagram (2011) were still relatively new and had not gained the high usage figures that later developed. These channels were not included therefore in the analysis of online communications and feedback relating to the Welsh visitor attraction experience.

The main emphasis of previous studies in relation to the management of visitor experience by visitor attractions, particularly when measuring experience through service quality, has been on the consumer viewpoint (demand-side). The perspective of the visitor attraction operator (supply-side) has been largely ignored (Leask, 2014; Campos, 2016). It is unclear to what extent (if at all) there may be a conflict between the opinions of attraction operators and visitors, especially in the context of the attraction 'experiencescape' (O'Dell, 2005 and Mossberg, 2007), in a digital context. Within the overall aim of this PhD thesis, the determination of a link between awareness, uptake and engagement with the management of online communications and

[6] Established in 2004 as a social networking site, Facebook had over 1.59 billion global monthly active users in 2015 (www.newsroom.fb.com accessed 16/02/16)

feedback as part of the marketing practices of Welsh visitor attraction operators might be investigated. Therefore, the following research question was formulated:

- Is there a link between operator awareness, uptake, and engagement with the management of online communications and feedback and high levels of satisfaction for Welsh visitor attractions recorded via online review sites?

1.3 Attractions and the visitor experience

Visitor attractions, at the most basic or fundamental level, can be described simply as the places that people visit, when on holiday or on a day trip from home (Robinson, 2012; Weidenfeld and Leask, 2013). Those visitors may initially decide on a particular area or wider destination to visit, perhaps tempted by cheap air travel or a special promotion, and may subsequently gravitate to specific attractions within that destination area. They may be deliberately heading for a certain attraction, or they may be combining their visit with a wider day visit that includes other activities such as shopping or visiting friends and relatives. With respect to 'attraction' it has been argued that each place may have its own special appeal or reason for people to want to visit it, and the motivational factors behind potential visitors' desire to go to a certain place vary for different people and different places and at different times (Holloway, 2009). Thus, heterogeneity and complexity in visitation must be recognised. Arguably, more attention and academic study is needed in this sector of tourism (Robinson, 2012), and as Leiper (2004 p305) observes: "*attractions should be a major topic in any general study of tourism, yet paradoxically most general text books on tourism say little about attractions*".

The early part of the twentieth century saw many new visitor attractions opening in the U.K. supported by Millennium or Heritage Lottery funding, yet many attraction developments seem to have been based on seemingly overly optimistic projections, with the need to secure grant aid and external funding often leading to weaknesses in business planning and visitor targets (Lennon, 2004). The need for better understanding of the experiences of visitors to attractions and how these are formed and influenced remains a key factor for tourism businesses as we progress through the twenty-first century (Mossberg, 2007; Leask, 2009; Ooi, 2010). In this digital age of communications and technology, with a proliferation of websites and social media sites, the online experience of attraction visitors is pertinent and of growing importance (Neuhofer *et al,* 2014). It has been argued that communications surrounding the visitor experience should be an integral part of the marketing activities led by visitor attractions themselves (Frochot and Batat, 2013; Sotiriadis and van Zyl, 2016). With this in mind, an introduction to the main marketing principles linked to visitor attractions is provided in the following section.

1.4 Attractions and marketing concepts

There has been some growth in the academic study of visitor attractions, visible through the work of Fyall *et al* (2002, 2008, 2012), Swarbrooke (2009), and Leask *et al* (2014), for example. However, much of the more specific work on marketing-related issues has tended, in the main, to be piecemeal and has concentrated on museums and visitor attractions in the heritage sector, see for example Misiura (2006) and Theocharidis *et al* (2014), with the former providing an example of the application of selected marketing frameworks to heritage attractions. The ubiquitous marketing mix model (Kotler, 2010), commonly known as the '4 Ps' of product, price, place, promotion, has been the one most commonly applied frameworks to attractions, arguably because of its relative simplicity (Fyall *et al*, 2002; Jones, 2002; Garrod *et al*, 2007; Holloway, 2009; Fullerton, 2010; Robinson 2012). Yet, in the wider field of marketing study, this model has been continually critiqued, reviewed and extended for some time to include other Ps, notably process, people and physical evidence (taking the '4 Ps' to '7 Ps'), and these dimensions have been recognised to hold high degrees of relevance for the service sector and the consumer experience (Brassington and Petit, 2006; Blythe, 2008; Palmer, 2009; Jobber, 2009; and Kotler and Keller, 2010). Although links between experiential marketing[7] theories and visitor experience are made by O'Dell (2005) and Mossberg (2007), Kim Lian Chan (2009) supports the argument that the application of the extended marketing mix or 7 P's (incorporating process, people and physical evidence), has not been fully applied to the visitor attractions sector, in particular the study of museums as 'service experience providers'. He argues that there

[7] Experiential marketing sees customers as human beings with emotions, seeking experiences that give them pleasure or satisfaction (Schmitt 1999) rather than making decisions only based on functional aspects of the product.

is scope to explore further the concept of 'service experience consumption' by visitors, grounded in their own words and actions. Kotler *et al* (2010a) also note a need to respond to a shift in consumption behaviour, highlighting the development of ‘communities of customers’ based on shared values and emotions in what they term ‘Marketing 3.0’. These developments suggest important implications for the marketing and management of sites of service experience consumption (which include visitor attractions), not least in relation to the idea that perceived empowerment by consumers may emerge from internet-based co-creation activities (Füller *et al*., 2009) if online presence is managed effectively. There is a danger that the increased visibility of visitor communications and feedback online (far beyond the realm of the traditional visitor comments book) present a continual management challenge to visitor attractions, fuelled by the development of online communities centred on online supplier communication and feedback. In sectors outside of the tourism industry, recognition of this potential threat has resulted in concerted attempts to build stronger brands through online communities. There has perhaps been most attention paid to this at destination brand level (Bayraktar and Uslay, 2016), and lesser so at the level of individual visitor attractions.

This thesis essentially may be situated in the broader context of tourism marketing. Its focus on a supply-side perspective of the management of online communication and feedback relating to Welsh visitor attraction experience leads the researcher to investigate tourism marketing practice. Thus, the literature review in Chapter 2 pays considerable attention to tourism marketing-related concepts and ideas. The structure of the thesis in relation to the research aim and objectives is presented in Section 1.5.

1. 5 Chapter summary: Thesis outline

This first chapter (a) introduces the rationale for the study and then (b) outlines its focus and sets the boundaries in terms of research aim and objectives. Marketing concepts relating to attractions are introduced, as well as brief coverage of process and quality issues leading to introductory discussion of the attraction experience and the impact of online communications.

Chapter 2 provides a review of literature relating to tourism, visitor attractions, and relevant marketing concepts and models. It commences with a brief examination of the historical context of the development of visitor attractions, from the origins of organised visits to natural features, man-made buildings or sites of specific interest such as battlefields or natural disasters. The reasons and motivations behind the desire of people to visit such locations is then investigated. The use of terms such as 'tourists' and 'visitors' are examined before moving on to review how marketing models such as the extended marketing mix (Kotler *et al*, 2010, 2010a) might be applied to attractions within the context of a digital age. Experiential marketing themes and the 'experiencescape' (O'Dell, 2005; Mossberg, 2007) are considered before proceeding to netnographic[8] issues (Neuhofer *et al*, 2013) as the basis for the investigation of online tourist experience (Leung *et al*, 2013; Sigala, 2016).

Chapter 3 addresses research objective 1. It outlines the context for the research and provides an updated review of the Welsh visitor attractions landscapes, and in particular considers developments in the industry since the work of Stevens (2000)[9] – who provided the most comprehensive source of baseline data relating to this sector. He had concluded that there had been huge growth in product development in the decade prior to 1998, but that the type and scale of future developments in the sector was unclear. There could be the "*emergence of a new geography and typography of visitor attractions (and) the concept of multi-faceted and multi-occupier sites*" (Stevens, 2000b, p 60). Annual surveys of attractions carried out by Visit Wales are restricted to a relatively low number of attractions that participate (Welsh Government, 2014a; 2016), and provide only a limited picture of possible developments in the sector. It was therefore essential to provide an updated picture of the distribution and variety of Welsh attractions, in order to provide the context for the primary research in this PhD that was focused on a selected sample of visitor attractions in Wales.

Chapter 4 presents the research methodology. It discusses the main framework for the research; reiterates its purpose and the methodology describes how the research data was collected. The direction taken involves an emic interpretivist approach including a combination of qualitative, quantitative and netnographic methods to provide more than one means of gathering data. Using

[8] The use of qualitative methodologies online has been called 'netnography' (Kozinets, 2002; 2015). This term combines elements of the words 'internet' and 'ethnography' and can provide a framework for analysing and gaining insights into consumer behaviour within digital communities and online cultures.

[9] The work of Prof. Terry Stevens is amongst the most widely cited in relation to historical reviews of the Welsh visitor attraction sector and it has often been cited by Welsh tourism policy-makers

the interpretation of the secondary research carried out in Chapter 3 as a benchmark to quantify the overall dataset of attractions, three phases of primary research were used to gather data for analysis. The first method consisted of an online questionnaire sent to 450 visitor attractions in Wales, to enable analysis of the key marketing-decision making processes used by respondents, and their understanding of the visitor experience (Phase 1). The aim of this was to provide a 'snapshot' of the business and marketing-related factors behind the operation and management of these attractions. A group of owner-operators or managers of attractions, drawn from those that had provided contact details (n=43), and those that had not, were then selected for further in-depth semi-structured interviews to gain a greater depth of knowledge of the key marketing process issues operationally influencing these attractions (Phase 2). A critical analysis of the online presence of 84 selected Welsh visitor attractions was carried out (Phase 3), examining key aspects of their websites: content; use of images; visitor information; as highlighted by Blum and Fallon (2001). TripAdvisor and Facebook listings, visitor comments and any responses from attraction managers were also examined. The attraction sample chosen for this netnographic analysis comprised the 43 attractions in Phase 2 of this research, plus an additional 8 visitor attractions operated by Cadw, The National Trust and a Local Authority, which were added to the list to ensure a more representative view of the overall attractions sector in Wales. In addition to this, a further 33 attractions were included from the list of Blum and Fallon (2001) to allow for critical comparison of that data, using a variation of the combined evaluation framework approach.[10]

Chapter 5 presents the findings of the three phases of research, with discussion and analysis of the results. The first phase is the online questionnaire emailed to 450 attractions in Wales. The response rate was 18% (n=81), and critical analysis of the answers is provided, with additional interpretation of the results where possible and relevant. The second and third phases of primary research describe the findings and analysis of the semi structured interviews and review of websites, TripAdvisor, Facebook and Google listings. For the interviews, attractions were selected both from those that had responded to the online survey and those that had not, in order

[10] This approach allows the evaluation of websites and UGC using agreed perspectives, list of features and criteria (Pendersen et al, 2002; Pu et al, 2011)

to attempt to identify any possible differences in responses. 53% (43) of the attractions completing the online survey had provided contact details to get information on the results of the research. One face-to-face interview was completed, followed by 15 telephone interviews to form the first phase of scoping work in order to provide initial insight into the practices of the visitor attractions in relation to their collection, monitoring and use of visitor feedback. The results of the interviews were critically analysed and the key topics arising from the investigation of marketing process and quality issues for operators were coded using the themes identified in Phase 1. The findings of the analysis of website, TripAdvisor, Facebook and Google listings and reviews is presented using cross sectional analysis, with a thematic summary and statistical analysis, as described in Chapter 4.

Chapter 6 concludes the research. A summary of the key findings of the research are placed in the context of the relevant academic models and theories discussed in the literature review. The relevance of these are re-examined to see if they remain valid or if any new models emerge. It also contains the analysis of the links between marketing concepts and the visitor experience and how this relates to the chosen samples in the quantitative and qualitative surveys. The limitations of the research are identified, together with recommendations for future research in this area, and implications for visitor attraction operators.

Chapter 2
Literature Review

2.1 Introduction

This chapter provides a thematic review of literature relating to the focus of the PhD (as outlined in Chapter 1). The review of existing research is shaped by the personal and professional experiences of the researcher and affects the conceptual thinking presented (in Chapter 3). In line with the overall focus of the thesis, the chapter primarily focuses on literature relating to the visitor experience, but it also considers literature relating to marketing management practices and their application in a visitor attractions context, with a specific focus on online communication and feedback. The chapter provides an introduction to the historical development of visitor attractions before considering how marketing models such as the extended marketing mix (Kotler *et al*, 2010) might be applied to attractions within the context of a digital age. Experiential marketing themes including the 'experiencescape' (O'Dell, 2005; Mossberg, 2007) and co-creation of experience are considered before acknowledging links between service quality experience and satisfaction. Growing interest in the effectiveness of customer experience / relationship marketing linked to supplier awareness of, uptake of and engagement with online visitor communication and feedback is acknowledged.

2.2 Visitor attractions, tourism and marketing

Many tourism textbooks, such as Callaghan *et al* (1994); Holloway (2009) and Morrison (2013), tend to concentrate on tourist destinations in their coverage of where visitors go, and these have in the main been towns, cities or wider geographical areas such as a coastline, area of countryside or specific region. There has been little reference to 'attractions' as specific places to visit unless they are the 'primary' visitor attractions that are destinations in their own right (Stevens, 2000a). The importance of visitor attractions as driving forces of and even fundamental contributors to the tourism industry has previously been acknowledged (Gunn, 1972; Lew, 1987; Walsh-Heron & Stevens, 1990; Swarbrooke, 1995, 2009; Goeldner *et al*, 2000; O'Dell, 2005; Robinson, 2012). Additionally, a lack of academic study of the visitor attractions sector, and the need for further research in this area have also been highlighted (Fyall *et al*, 2008; Swarbrooke, 2009; Holloway, 2009; Leask, 2009; Leask *et al*, 2014). When examining the attractions sector in countries such as Wales, the driving force behind the development of attractions has not always been clear. Many questions arise in relation to the extent to which the sector is market-driven (is the visitor looking for somewhere to spend their time?) or product-driven (is the visitor attraction seeking to get people to go to it?). The extent to which visitor attraction development is demand-driven or supply-led remains unclear. The two forces are described in marketing literature as 'push and pull' factors (Kotler, 2010). In this thesis those factors are implicit or underpinning in respect to considering visitor attraction operator responses to visitor feedback on attraction experiences. That is to say, there is a need to consider the nature of the driving forces behind attractions and the relationship between demand and supply. For example, failing to respond to visitor feedback in a market-driven environment might have very different implications to neglecting visitor feedback in a product-driven environment, not least in terms of scale and significance for sustainable visitor attraction operations. Failure to respond to visitor comments or a request for information on opening times, could lead to a loss of potential visitors and income and negative visitor perceptions of the attraction and visitor experience.

This chapter presents a thematic literature review, guided by the elements underpinning the research objectives presented in Chapter 1. The use of the visitor experience as a marketing tool is considered through a review of marketing models and, in particular, the marketing mix in relation to tourism. The operation of visitor attractions as both demand-driven and supply-led entities is considered. The review ends with acknowledgement of the relevance of online communication and feedback for management of the visitor attraction experience.

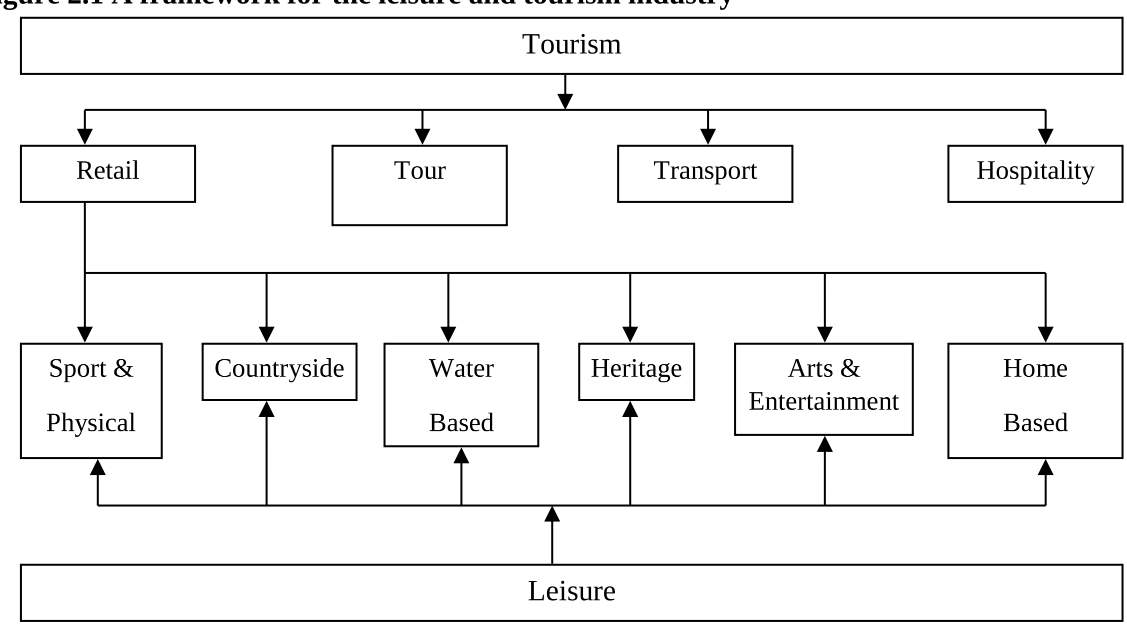
2.3 Different types of visitors and the evolutionary consideration of visitor attractions: blurred boundaries

In order to fully understand the role and position of visitor attractions in tourism, it was decided that there was a need to contemplate briefly the development of attractions in an historical context, and reflect on what motivates people to visit certain places or buildings. Swarbrooke (2009) asked if the Egyptian Pyramids only truly became recognised as tourist attractions with the advent of mass tourism in the modern era. He questioned their significance as attractions during Roman times when the occasional visitor that went there to see the imposing structures were low in numbers. Had the pyramids already been the focus for what we now recognise and describe as 'religious tourism' in their very early days? Swarbrooke's ideas are important not only in that they force us to consider the nature and significance of an attraction, but they also raise the issue of when visitation may be identified to occur for touristic purposes. Religious pilgrimage was perhaps the earliest strong motivator for extensive, often hazardous travel (Urry, 1985), but as Swarbrooke (2009) asks, what is the tipping point at which religious sites become visitor attractions – is it simply when the main reason for visiting them is given as education or for a new experience? If the latter were true, it could have major implications for the management and future development of these places, particularly in the context of more recent application of the experiential marketing concept (Ritchie *et al*, 2011). That idea is investigated in more detail later in this chapter.

It has been claimed that, "*In the middle ages people were tourists because of their religion, whereas now they are tourists because tourism is their religion"* (Runcie, 1988 p 62). Timothy and Iverson (2006) refer to the fact that many Muslims are avid travellers, encouraged to visit different places by their Islamic doctrines, and over 2 million devotees make the annual pilgrimage (Hajj) to Mecca, Saudi Arabia, which is managed as a major tourism event in addition to its religious significance. In a similar vein, albeit not on the same scale, it is possible that many of the larger British churches and abbeys such as St David's Cathedral in Pembrokeshire, now receive more visitors through tourism, going to see an historic 'attraction' than actual worshippers (Welsh Government, 2015). There have even been efforts to develop this area of activity, and increase the number of 'tourist' visits through such initiatives as the Churches Tourism Network Wales (www.ctnw.co.uk) with varying degrees of success. Yet the extent to which the original 'core' element of the attraction is affected or altered by the possible need to change it for the 'new' visitors remains unclear, as is the exact experience of the visitors (O'Dell, 2005). Following this idea of going to see something that is somehow 'different' from where someone would normally go, curiosity and the desire for new experiences have regularly been cited as reasons for people to visit new places (Holloway, 2004). However, this alone does not fully explain the development of certain specific visitor attractions as places for people to visit. Smit (2002) notes in his account of the development of the Eden Project in Cornwall, that many attractions have developed based on a single, unique raison d'être due to their location or collection/display. Yet, in their successful move from idea to fruition, they have also, perhaps been heavily reliant on the driving force and determination of one key person, who wanted to 'make it happen'. The human element of visitor attraction management should not be overlooked (Stevens, 2000b), and neither should the human element of visitor demand, both arguably contribute to the 'experience'.

The 'modern' idea of people seeking to fill their leisure time with worthwhile activities is not necessarily new (Burkart and Medlik, 1981; McKercher *et al*, 2002; Hosany and Witham, 2010; Kim, 2016). Leisure time can be an integral part of personal development (Hemingway, 1988). What emerges is the idea that many visitors will have an explicit or implicit expectation of gaining something from their visit to an attraction - even if it is on a subconscious level, they are seeking *something* from the experience. This could range from a straightforward physical experience – the thrill or fear from a theme park ride; the excitement of a new experience; to gaining knowledge, personal development or better understanding from a visit to a museum or art gallery (O'Dell, 2005; Mossberg, 2007). This is a theme that is developed further in Chapter 3 of this thesis in relation to exploring the context of visitor attractions in Wales and the conceptual thinking of the researcher. It may be argued that the understanding of leisure has grown to incorporate a tourism industry that is made up of the various elements of travel, accommodation and visitor attractions that also have links to 'leisure' (Swarbrooke, 2009). Indeed, a framework connecting the components of leisure and tourism in an industry context can be recognised (Figure 2.1).

Figure 2.1 A framework for the leisure and tourism industry



(Source: Tribe, 1995)

In this framework by Tribe (1995), the diversity of componenets of the industry is illustrated and the interrelationships highlighted. Articulating a clear link between leisure and tourism related activities is far from new (Hemingway, 1988). The roots of a more commercialised development are seen in the phenomenon of the European ‘Grand Tour’ in the seventeenth century and the appearance of entrepreneurs such as Thomas Cook, who was perhaps amongst the first to introduce and apply a truly effective ‘marketing’ approach to his endeavours and activities (Youell, 1998; Holloway 2009; Robinson, 2012). Cook took advantage of a developing transport infrastructure to develop what had been a ‘niche’ product into one that was accessible to the masses. Increasing numbers of people had the time and money to travel away from home, perhaps for the first time (Foster, 1985; Holloway, 2006), leading to a ‘democratisation’ of travel (Urry, 1985). Other societal changes that supported improved working conditions and a more educated workforce also helped fuel the growth in recreational leisure, notably a desire to visit green, open areas of the countryside and coast to escape the urban landscape blighted by industrial processes. This is demonstrated by the modern idea of tourism as:

> “*a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure”* (UNWTO, 2014).

Looking in more detail at the specific destinations of these ‘visitors’ can lead to a simple classification of attractions which includes ‘natural’ and ‘man-made’. This covers purpose-built visitor attractions as well as those constructed for other reasons, that have since become visitor attractions, such as Bournville model village in Birmingham, UK now home to the Cadbury World attraction, reporting visitor numbers in excess of 590,000 in 2012 (Brown, 2012). The reasons for visiting different types of visitor attractions can be quite straightforward, often linked directly to the type of place – going to enjoy beautiful, majestic scenery or visiting the remains of a historic monument such as a castle or stately home, where visitors can gain insights into the lives of people in earlier times. Middleton (1988 p 32) describes an attraction as: “*a designated permanent resource which is controlled and managed for the enjoyment, amusement,* *entertainment, and education of the visiting public*". One problem with this definition is that it could easily include theatres, cinemas and other venues whose main aim is entertainment alone and which receive mostly local people. Youell (1988 p33), suggests a demand-side definition: *"a visitor's overall perception of a destination as an attractive place to visit*", bound with subjectivity. Academic discussions of visitor attractions to date have blurred boundaries between tourism and leisure and the designation of what an attraction is – in short, it has been argued that attractions can include destinations as well as specific points of interest and can be temporary as well as permanent features. Further complexity has been highlighted in relation to the audience or the market of the attraction, in particular, debates have arisen around the connotation of 'tourist' versus 'visitor'.

2.4. Tourists or Visitors?

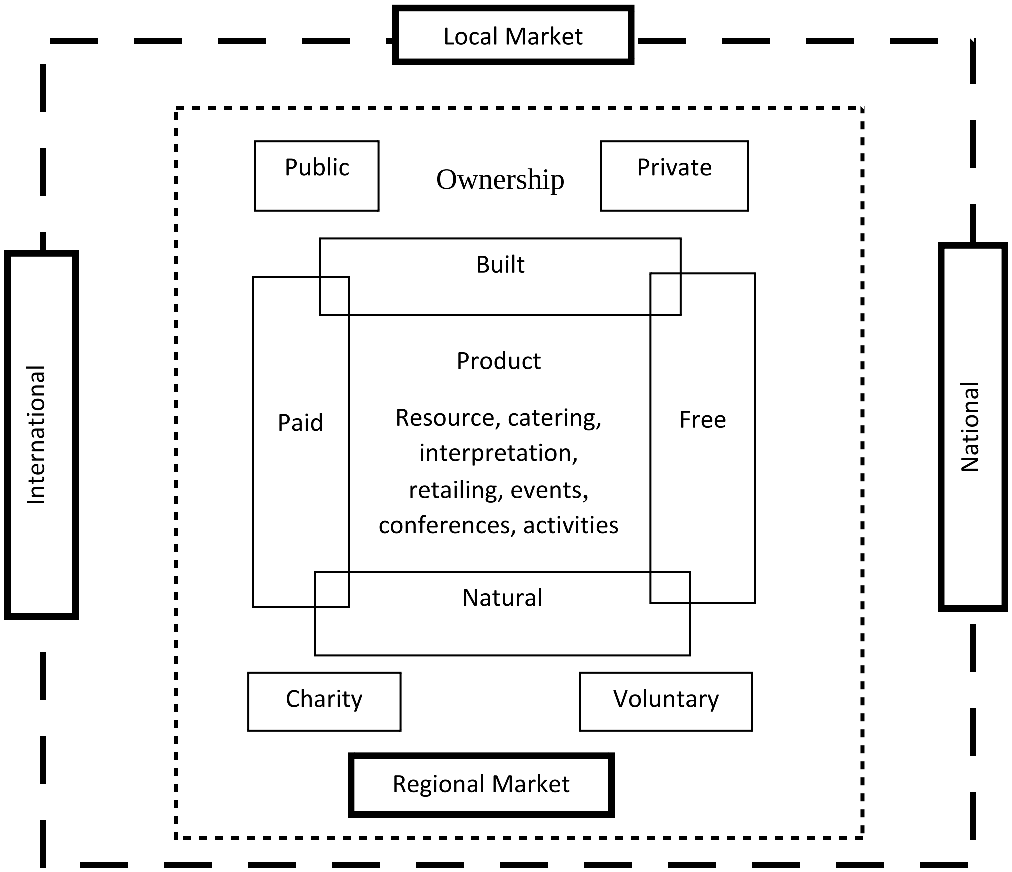
In most Western countries, the term 'visitor attraction' is widely accepted as describing the places that people go to visit, yet the term can still be interchangeable with the 'tourist attraction' (Holloway, 2009). The difference between 'visitor attraction' and 'tourist attraction' may be nothing more than the way that the words are commonly used. Most people going to an attraction are not in fact 'tourists', on holiday or staying away from home, but may be local residents on a day out (Urry, 1998). Callaghan *et al* (1994 p 55) note that, "*Although not officially tourists, day visitors, in terms of their numbers and spending power are an increasingly important market for some tourism-related enterprises*" Hence, it may be acknowledged that the term 'visitor' would appear to be the most acceptable in its association with attractions in this context (Swarbrooke, 2009; Dewhurst and Thwaites, 2014), and thus, appropriate in its association with attractions in the context of this thesis. The term 'visitor' has been used to link the concepts of tourists and excursionists, where excursionists are those that visit and leave without spending a night in a destination (Mason, 2006). '*Visitor attraction'* is therefore the term that best describes the places under investigation in the context of this PhD research, notwithstanding that there is still much to understand about the motivations of visitors for going to certain attractions as well as the ways in which the operators of the attractions themselves seek to attract their visitors.

The desire to see something different, to acquire some kind of stimulation, is purported to be a strong motivational factor behind visiting different places (Sharpley, 2008; Robinson, 2012).

Emotional appeals can come from a beautiful painting or piece of work in an art gallery as well as from a special landscape. Stimulation can be positive and negative. Visiting a battlefield site or the scene of a natural or man-made disaster, for example, can evoke strong feelings of pride and woe, often simultaneously, amongst visitors. The study of visits to such places as Auschwitz and Ground Zero in New York has led to the use of the term 'dark tourism' linked to this phenomenon (Lennon and Foley, 2000). The planned development of experiential attractions, where much attention has in the past been put on theme park rides has been linked by Holloway (2006) to travelling fairgrounds and circuses, which in turn led to the ground-breaking work of Disney in the twentieth century in concentrating on the visitor 'experience'. In recent years, there has been a growing trend for more and more senses to be involved in the managed 'experiences' of attractions, as an interpretation aid, starting with authentic smells, to movement such as the transporter vehicles at Jorvik, to being sprayed with water and blown by wind on the Cadbury World factory tour. The issues of visitor experience and co-creation of experience have become increasingly important in tourism (O'Dell, 2005; Mossberg, 2007; Kim *et al*, 2012; Campos *et al*, 2015; Sigala, 2016) alongside increased academic recognition of the importance of senses, emotions and 'embodiment' in the context of tourism visitation (Everett, 2008; Thurnell-Read, 2011).

A major issue when studying the attractions sector and visitor experience, is not just the diverse nature of the attractions themselves, but also the wide range of different owners and operators and the experiences they may strive to create or provide. Leask (in Fyall *et al*, 2008, p 8), observes how "*Visitor attraction sectors around the world are often typified by a large number of small, geographically segmented and resource-poor attractions trying to meet a multitude of objectives for a diverse set of owners"*. This diversity is developed further by Leask (2008) in her classification of attractions (Figure 2.2), which highlights the multiple characteristics of attractions.

Figure 2.2: Classification of Attractions



(Source: Leask in Fyall *et al* (2008)

It is theorised that the different types of ownership may affect the way that the attractions are operated, and the type and range of facilities and experiences offered. Leask's (2008) classification, although largely descriptive in nature, helps to illustrate the complexity of the attractions marketplace, with the range of operators and variety of factors affecting the attraction 'product' and visitor experience on offer. These range from the obvious tangible, physical features to the intangible aspects of a service product and the experience that the visitor has at an attraction during a specific visit. The core product is shown as including all those factors directly offered by the attraction that helps draw visitors to the site. It also includes elements that reflect the increasing pressure on all attractions to generate income, such as catering and events. It is this pressure to attract additional revenue that has led many visitor attractions to diversify and focus on their potential roles as venues for conferences and meetings or weddings, for instance. In these circumstances, leisure visitors can receive secondary attention vis-à-vis other customer groups based on spending power. This can play out as user group conflicts as observed at many outdoor recreation and cultural heritage sites. The implications are that through market diversification visitor attractions risk alienating specific market segments, notably the conventional attraction visitor.

2.5. Attractions and the marketing perspective

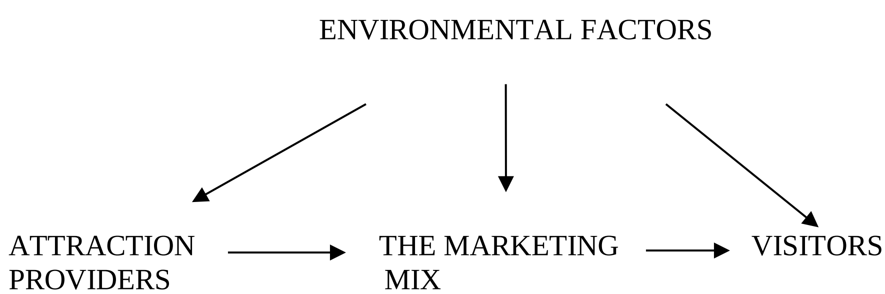
The influence of the public and third sectors[11] in the development of attractions is described by Stevens (2000a) in his review of attractions in Wales, where he describes the country as being dominated by attractions of this type. This may be explained to some extent by the fact that there are a significant proportion of attractions operated by Local Authorities and Cadw[12], and this is investigated further in Chapter 3. The term 'third sector' can incorporate organisations such as The National Trust, and whilst this organisation has a clear, commercial focus in the operation of its retail branch: National Trust Enterprises, the academic study of the influence of open market forces and the development of privately run attractions for profit has mostly been confined to references to Disney (Fyall *et al*, 2008). Gunn (1972) refers to visitor attractions as the focal point for tourism activity and services, yet despite their seemingly obvious importance for tourism employment and possible positive economic impact, there has been a lack of scholarly research and academic studies in this sector in the past compared with the attention given to other parts of the tourism industry such as transport and accommodation (Leask, 2009). As Lennon (2004) declares, perhaps the study of visitor attractions has finally become worthy enough for them to be seen as commodities for consumption, falling within the marketing framework and linked to these and other management models and theories. The work of Misiura (2006) in applying marketing models to heritage attractions in particular, sets the scene for further possible work in this area. Lennon (2004) concludes that there are a series of marketing models and theories that could be relevant to visitor attractions, including the product life cycle; the marketing mix; elements of consumer behaviour; and analysis of what constitutes the attraction product and the visitor experience. Yet there have seemingly been few attempts to follow this path into the use of

[11] 'third sector' is a term used to encompass charity, voluntary non-governmental or not-for-profit organisations
[12] Cadw:Welsh Historic Monuments is the statutory body for ancient monuments and listed buildings in Wales (Cadw is the Welsh word for 'to keep or preserve')

mainstream marketing models for attractions that explore the visitor experience (Campos *et al*, 2015). This is particularly true when trying to describe and examine the performance of attractions, which has historically tended to focus solely on the number of visitors to an attraction. If an attraction had an increase in visitor numbers, it was perceived to be more successful (Stevens, 2000b), with no account taken of other financial, or management benchmark factors. One reason for a change to look the performance of attractions in terms of experience, rather than just how many visitors were attracted each year might be the fact that marketing itself was changing. In the 1990s, the 'postmodern'[13] marketing ethos (Brown, 2001), was emerging. This created confusion, however since whilst the term 'postmodern' was relatively new to marketing, it had already been applied to tourism for many years before this, with Disney's theme parks cited as prime examples of a 'postmodern' tourism experience in the 1980s (Urry, 1990).

It should not be overlooked that there have been some notable attempts to apply marketing theory frameworks to visitor attractions. In particular, Misiura (2006) developed a set of generic marketing principles and applied them within a study of heritage marketing. This can be further adapted to apply to the marketing of attractions as shown in Figure 2.3.

Figure 2.3 A summary of the generic principles in the context of visitor attraction marketing



(Source: Adapted from Misiura, 2006)

It must be emphasised that a significant issue here, as introduced above, is that historically the performance of many visitor attractions was routinely assessed based on a review of their visitor numbers (Pender & Sharpley, 2005; Stevens, 2000b; Fyall *et al*, 2008; Lennon 2004). This was a metric advocated by tourism policymakers. Indeed, U.K. National Tourist Boards regularly

[13] Postmodern in this context refers to the de-construction of narratives and the focusing on customised experiences rather than broad market generalisations (Palmer, 2009).

produced lists of visitor attractions in Wales, Scotland and England ranked in order of highest numbers of visitors first, that had little or no bearing at all on the financial performance or even quality of an attraction (however that may be measured). The practice continues with annual results of surveys that include ‘the top ten free attractions’ and ‘top ten paid attractions’ (Welsh Government, 2015; ALVA, 2016). Using the total number of visitors an attraction receives as an indicator of success in overall business management terms is much the same as using sales figures alone as a measure of the quality or financial success of any product, which itself is a flawed benchmark when used in isolation (Kotler *et al*, 2010). Tourism academics have recognised the need for a new measure of assessing visitor attraction ‘performance’ in terms of what is provided to visitors. This prompted increased numbers of studies of the visitor ‘experience’ (O’Dell 2005), an area of focus that has arguably been facilitated through online visitor review sites such as TripAdvisor, Facebook and even Google, where visitors can leave a review of their ‘experience’, and ‘rate’ their satisfaction publically. Aside from presenting more readily available data, these digitalised versions of the traditional visitor comments book offer opportunities for supply-side responses to visitor feedback and facilitate relationship marketing (focusing on building customer loyalty and long-term customer engagement).

Whilst considering the fact that many attractions might be perceived as being more successful if they increase their visitor numbers each year, there is also the possibility of sites operating at a financial loss, particularly those in the third sector, who may depend for their survival on grants or subsidies. Linked to this also, is the fact that the motivation and raison d’être of some attraction operators, even in the private sector, is not primarily to make as much money as possible (Swarbrooke, 2008; Falk and Dierking, 2013; Morrison, 2013). Many smaller owner-operators may have developed their attraction as a lifestyle enterprise and could even be averse to applying rigid business management techniques to see their ‘businesses’ develop. Even when considering the business plans (or lack of them) for many attractions, in the public, private and voluntary sectors, there has often been a lack of realistic and accurate financial forecasting, with many attraction developments based on over-optimistic targets and business plans that were perhaps unrealistic (Lennon, 2004). The pressure on attractions to over-inflate visitor targets to gain European Funding, Lottery support or grant aid has been considerable (Smit, 2002). This burden, combined with a distinct lack of response from the various funding bodies to consider clawing back any financial support when actual performance has fallen far short of the agreed targets has sometimes led to a false cycle of over-optimistic target setting. Seen within a business management context, many of these issues relating to the running of a visitor attraction could be broken down into recognisable marketing categories such as: numbers of visitors (sales targets); the day-to-day operating cost (cost of production); and promotional expenditure (publicity/advertising costs). However, marketing theories have progressed a long way from such a simple overview, to encompass what is known as the marketing process (Brassington & Pettit, 2006; Blythe, 2008; Jobber, 2009; Kotler and Keller, 2011; Morrison, 2013; Campos *et al*, 2015). Marketing is no longer just about selling or advertising and has been defined by the U.K. Chartered Institute of Marketing as: "*the management function that is involved in identifying, anticipating and satisfying customer requirements profitably"*[14].

Marketing is therefore, arguably, more to do with understanding and identifying actual or potential target markets for a product (or service), increasingly through using the principles of segmentation; targeting; positioning and branding (Kotler *et al*, 2009), rather than just selling or advertising. In considering the marketing of visitor attractions therefore, the 'new' focus is not on the advertising or promotion of attractions, which would be the out-of-date yet sometimes still commonly held use of the term. Instead, the attraction marketing process should encompass the customer (or visitor) needs and focus on how to realistically provide and satisfy those, as well as the most effective way of communicating with them. Dibb and Simkin's (2002 p 24) observation holds relevance here. "*The aim of marketing is to know and understand the customer so well that the product or service fits him/her but allows the organisation to achieve its goals*"

Many marketing theories and models were traditionally linked to two main areas – the product i.e. what was being manufactured and sold; and the customer – the person who was buying it (Kotler and Keller, 2011). As acknowledged earlier, these ideas have evolved significantly to include the notion of 'experiential marketing', the impact of the digital age and social media, and these have all had an impact on tourism (Leung *et al*, 2013; Leask *et al*, 2014; Sotiriadis and van Zyl, 2015). A critical analysis and discussion of the marketing of visitor attractions and the visitor experience in a digital age, can therefore draw for its framework on many of the widely-accepted

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[14] It is interesting to note here that the use of the term 'profitably' is widely accepted to mean of benefit to both parties rather than in just the financial use of the word (Blythe, 2009).

concepts, terms and models of current marketing theories and models, as set out in the following sections.

2.6. The Marketing Mix for visitor attractions

The marketing mix, traditionally known as the '4 P's, and now usually extended to the 7 P's[15], has become established as one of the foundation models for studying marketing activities in any situation (Brassington and Pettitt, 2006; Jobber, 2009; Kotler, *et al* 2010; Baines *et al*, 2011). The list has been extended to include up to 12 or more 'P's to cover developments linked to a greater emphasis on service industries, consumer behaviour and social marketing (Palmer 2009). Kotler (2010) believes, however, that many of the additional P's can easily be incorporated within the basic four of 'product', 'price', 'place', and 'promotion', although some of the further P's are still relevant, especially for the service industry. Therefore, adding 'people', 'process' and 'physical evidence', makes up the '7 P's mentioned above. Although very popular, this is not the only model that has been suggested to represent the marketing mix, and other ideas such as the '4 C's (Blythe, 2008) have also been suggested, reflecting a greater emphasis on the move from mass to niche or more focussed marketing (Table 2.1).

Table 2.1. The 4 Ps and 4 Cs

Product	Consumer	Focus on consumer needs
Price	Cost	Including all elements of the cost to the customer of ownership of the product
Place	Convenience	The ease of finding and purchasing the product, including developments in technology such as the internet
Promotion	Communications	A broader focus covering all communications with the consumer

(Source: Adapted from Blythe (2008)

Whilst the 4 C's model has a role to play in the study of marketing, the '7 P's framework is still the one most widely accepted and currently used (Kotler and Keller 2011) and this, therefore is the one that was applied to the visitor attractions sector in this study. The four main elements of the traditional marketing mix are used, but for attractions 'planning' can also be incorporated within 'product', particularly in relation to the setting up and development of the attraction, an area of market analysis that has shown many apparent deficiencies in the past: "*all too often a*

[15] Product, price, place, promotion, people, process, physical evidence

plan is developed without the market having been adequately researched to establish whether demand is viable. All too often investment is made in the product with inadequate thought to managing or marketing it" (Lickorish, 1994 p 10).

2.6.1 Overview of the application of the 7 P's model to visitor attractions

The attraction **product** as described by Wanhill (2008) draws on marketing models and definitions such as that of Kotler *et al* (2010), and in particular the service element is highlighted in this context (Swarbrooke, 1999; Lynch, 2007). The need for a variety of attraction products to suit the needs of different consumers (visitors) is mentioned by Timothy (2005). Such study of the visitor attraction product often leads to the application of the product life cycle (Vernon, 1966) to visitor attractions (Lennon, 2004; Mason, 2006), before dealing with another 'p', that of **promotion**. The elements investigated here are not just focused on how to gain the attention of potential (and repeat) visitors through advertising and publicity, but also involve an examination of the decision-making process that may lie behind any visit (Swarbrooke, 2009). **Price**, and the way it is linked to different elements of the attraction product (Walsh-Heron & Stevens, 1990) is discussed before looking at **place** in the attraction context (Leiper, 2004; Lennon, 2004). The next element of the marketing mix, **people**, is linked to the customers or consumers of the product (Palmer, 2009). Visitors will choose which type of attraction to visit depending on a whole host of motivational issues relevant to them at a particular time. Tourism subtypes are identified (Swarbrooke, 2007) as part of segmentation analysis of attraction visitors.

The attraction **process** taking place between an attraction and its visitors (Cherem, 1977) has been compared with the marketing process in tourism (Youell, 1998). The wider marketing context of process is incorporated in a review of the literature relating to the environmental analysis for attractions using elements of the PESTLE framework (Jobber, 2009; Palmer, 2009; Kotler *et al*, 2010), the origins of which can be traced back to Arnold Brown's Strategic Trend Evaluation Process or 'STEP' model (Yuksel, 2012). The significance of **physical** evidence emerges as part of the attraction product, and its impact on the visitor experience, and is also an important factor in the **service** element of the attraction product. With respect to this, the relevance of the

SERVQUAL[16] model (Parasuraman, Zeithaml and Berry 1988, 1991), for measuring service quality cannot be overlooked. The particular application to attractions through subsequent developments such as HISTOQUAL for historic properties (Misioura 2006), MUSEQUAL for museums (Allen 2001) and ATTRACTQUAL for attractions (Lynch, 2007) clearly note the impact on visitor experience as a result of the service received. This last model is based on a relatively small sample of responses (133) from visitors to 4 man-made attractions in Victoria, Australia and whilst clearly limited because of this, it opens the way for further work in this and other areas of study. These adaptations of the SERVQUAL model concentrate on the viewpoint of perceived quality in terms of service, satisfaction and behavioural intentions amongst visitors, but also include visitor experience as part of the overall measurement of 'value' (Buhalis *et al*, 2015; Neuhofer, 2016; Swart, 2016). There have been other developments in the study of visitor attractions and quality concepts, including Oriade's (2013) study, but even that was limited to two English attractions only – a theme park and a heritage attraction, again leaving much potential for further research in this area. A surprising omission, perhaps, in view of the emphasis on assessing quality, is that there is no mention at all of the Visitor Attraction Quality Assurance Scheme (VAQAS)[17] in Oriade's work, which is intended not just to focus the attention of operators on quality issues, but also act as a marketing tool (Visit Wales, 2012).

2.7. The Attraction Product

In the wider tourism context, there can often be some difficulty in identifying which tourism product is being referred to within any given context, since, as described by Jefferson and Lickorish (1989), a product can range from a sandy beach, a resort hotel, a seat on an airplane or an art gallery. All of these products can be part of the visitor experience whilst on holiday or even on a day trip. In a relevant context, the tourism product can even be simply described as "*a satisfying activity at a desired destination*" (Jefferson and Lickorish, 1989 p4). Satisfaction is thus, conceptually linked to product. Visitors may also include other elements of their overall experience into their opinion of the attraction – so for example problems with access or parking

[16] Devised in the 1980s this model attempted to assess service quality based on differences between cutomer expectations and service delivery in the financial services market
[17] The scheme has been operating in England and Wales since 2003 and is similar in many respects to a model developed in Scotland.

outside the direct control of an attraction may have a negative impact on the visitors' satisfaction rating of their experience at the attraction itself.

In trying to identify some of the basic characteristics of visitor attractions, problems with definitions start to emerge. The variety of attractions means that there is no all-encompassing definition – they either include too much that is not directly relevant (Middleton 1988), or can be too prescriptive and narrow so that many attractions are excluded. Walsh-Heron and Stevens (1990), in their definition, focus on certain operational features of a visitor attraction such as the way that they are managed, and the type and range of facilities provided for visitors. There are visitor attractions that meet some but not all of any detailed listing of such criteria (Stevens, 2000c). There are also difficulties with applying some of the descriptions and categories to particular types of attractions, such as whether or not an admission fee is, or could reasonably be charged. Trying to come up with one overall definition that encompases all types of visitor attraction or destination may not only be impossible but could be arguably irrelevant in some cases (Stevens 2000a; 2003). Table 2.2 illustrates some of the issues and differences arising from different definitions of attractions.

Table 2.2 Summary of visitor attraction definitions

Author/Source	**Definition**	**Comment**
Pearce, 1991	A tourist attraction is a named site with a specific human or natural feature which is the focus of visitor and management attention	Previously considered to be vague. Some events and festivals would be excluded
WTB, ETB, STB, NITB, 2001	An attraction, where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from the visitors	This definition continues to be used in Wales. Whilst venues such as the Wales Millennium Centre would be excluded by the definition, this site is included in annual surveys of attractions. Attractions that only have prior booking (eg some tours and boat trips) are also included in surveys. The definition also mentions charging admission.
Scottish Executive, 2007	An attraction where the main purpose is sightseeing. The attraction must be a permanent established excursion destination, a primary purpose of which is to	Slight initial change of wording, otherwise same as 2001. The criteria of

	allow access for entertainment, interest, or education; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue and employment, and must be receiving revenue directly from visitors.	operating as a 'single business' may not apply to third sector attractions run by organizations, charities or independent trusts. Free entry sites may not be receiving revenue direct from visitors.
Walsh-Heron and Stevens, 1990 p2	1.Sets out to attract visitors (day visitors from resident and tourist populations) and is managed accordingly 2.Provides a fun and pleasurable experience and an enjoyable way for customers to spend their leisure time 3.Is developed to realize this potential 4.Is managed as and attraction, providing satisfaction to its customers 5.Provides an appropriate level of facilities and services to meet and cater to the demands, needs and interest of its visitors 6.May or may not charge an admission for entry	Dark tourism attractions would not be expected to conform to the second criteria?
Holloway, 2009 p231	Attractions may be defined as natural or constructed (whether or not purpose built for tourism) and, if not constructed, they may still be to a greater or lesser extent 'managed' to suit the purpose of tourism or, more rarely, left entirely in their natural state	Emphasises the managed ie purposeful aspect of the attraction
Swarbrooke, 2009 p 4/5	Attractions tend to be single units, individual sites or closely defined small scale geographical areas that are accessible and motivate large numbers of people to travel some distance from their home, usually in their leisure time, to visit them for a short, limited period.	Emphasis on the managed aspect but also focuses on the motivation of people to visit. Includes destinations.
Weidenfeld and Leask, 2013	Highlights those of single unit or site, or small scale geographical area based on a single key feature. Also acknowledges the elements that draw visitors, a particular 'sight' and the role of heritage and experience	A review of existing definitions, including the bias of national tourism organisations' needs to collect statistical information on attractions
Dewhurst and Thwaites, 2014 p 272	Broad definition - anything that serves to attract visitors to a location. More detail refers to distinct groupings and sub groups of different types	Describes typologies based on product and visitor expectations

(Source: The author, 2016)

One particular weakness of most of the definitions identified in Table 2.2 is the exclusion of attractions that have a variety of constituent parts – for example those which feature large elements of shopping, as well as locations and images featured in films or television, which could become specific destinations or attractions in their own right. In addition to the complexity of different types of attractions within the U.K., there are also international differences of opinions, meanings and definitions of what is, or can be classified as an attraction (Stevens 2003, Holloway 2009). Another example of different categories and definitions was the recognised development of 'Dark Tourism', and although this may have only fully emerged in the late twentieth century (Lennon and Foley, 2000), it has already been identified as a motivating factor for visitors by Urry (1990), who refer to the morbid attraction of past scenes of horror such as battlefields or the sites of murders and atrocities. It is impossible to think of a visit to Auschwitz as a 'fun and pleasurable experience' as covered by the definition of Walsh-Heron and Stevens (1990), so which of the traditional motivational factors are relevant here? Lennon and Foley's (2000) description of Dark Tourism in the context of mass tourism also brings with it the factor of time, or chronological distance, and that the events referred to by them should largely be within recent or living memory. A key element missing from the list of Walsh-Heron and Stevens (1990) is 'education', which is surely a fundamental motivator and reason for visiting many attractions, especially in the heritage sector: "*tourism as a form of educative enterprise is strongly associated with the key principles of modernity*" (Lennon and Foley, 2000 p7). Within the definition of a visitor attraction used by U.K. national governments presented in Chapter 1 of this thesis, the key points to be drawn out include the reference once again to 'entertainment' as well as 'education', but also the importance of differentiating attractions from those places that are predominantly retail, or associated with sport, theatre or film. Hence leisure centres such as the LC2 in Swansea can be counted as attractions, but not the Wales Millennium Centre in its entirety, even though many of its visitors may be tourists or day trippers. For this reason, there is often great overlap between examining and studying the profile of theatre goers for example, and general tourism trends to an area or specific destination such as a large city with theatres and other places to visit.

According to Stevens (2003), definitions which lack reference to 'destination' attractions that include a wider range of eating, drinking and leisure, reveal a "*myopic, restrictive and outdated view of the attractions sector*" (Stevens 2003, p 62). Traditional definitions of attractions have been stretched by the need to accommodate different types of attraction facilities, often with more entertainment and retail elements (Lennon and Foley, 2000; Leask 2003). Large scale festivals and mega events[18] are also not included such as Glastonbury or the National Eisteddfod of Wales,

[18] A mega event is one that can have significant regional or national impact (Muller, 2015)

but interestingly enough, these would seem to fit Pierce's (1991) definition (see table 2.2). The Wales Millennium Centre could be classed as a destination attraction since it has multiple offerings and businesses within it, yet it does not strictly comply with the definition used by Visit Wales. It has been included in the annual survey of Welsh attractions by excluding the numbers of theatre goers and those whose main purpose of visit was associated with the theatre such as ticket sales or collection (Welsh Government, 2015). For national tourism bodies trying to assess overall tourism impacts, there has perhaps been the disinclination to exclude sites that have significant tourism activity so that their contribution can be counted of as part of the national level of tourism performance.

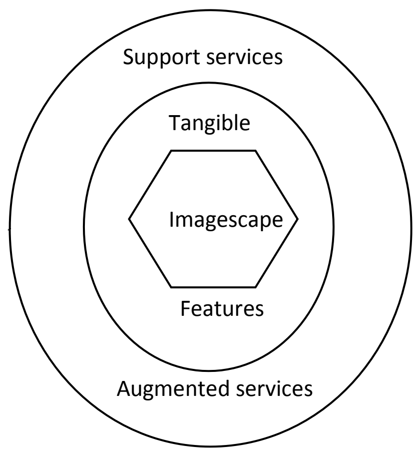
The relationships between quality and value as well as the actual experience at the visitor attraction, and the important part these may play in visitor motivation, also appear to be crucial elements missing from traditional definitions of visitor attraction. It is accepted that visitation is a multifarious concept; people will visit various places for different reasons depending on their motivation and expectations – sometimes parents take their children to a museum or gallery simply because they believe it will be more 'educational' than a theme park (Leask 2003). Yet if they are also entertained, it may positively enhance their visit experience and subsequent post-visit reflections (Garrod and Leask 2012). Visitor attractions can therefore be recognised to be an experiential product (Govers and Go 2003), and in this context Frochot and Batat (2013) describe how the attraction and destination service 'experiencescape' of O'Dell (2005) can be linked to elements of service marketing theories. How these attraction experiences form part of experiential marketing and can be measured are dealt with later in this chapter (Section 2.15). It seems, therefore, that what remains is not one all-encompassing definition, but perhaps an understanding of what the attraction is 'about' and this accounts for the examination of typologies later in this chapter.

Motivations for visiting different attractions can be distinct for many people – from the activity-led benefits of the leisure centre, to Misiura's (2006) claim that the reasons for going to an art gallery are more related to self-fulfilment and intellectual stimulation, although other models for investigating visitor motivation have since been developed (Selstad, 2007; Kim, 2014; Swart, 2016). The actual and perceived experience of an attraction can vary from visitor to visitor, and therefore *experience* is also an area that has struggled to fit into attraction definitions. The basic attraction product can vary from natural to built (man-made) as well as special activities or events, but throughout, it may be argued, there is overall relevance to the many marketing definitions of a product:

> "*a product is anything that can be offered to a market for attention, acquisition, use or consumption that might satisfy a want or need. It includes physical objects, services, persons, places, organisations and ideas*" (Kotler *et al*, 2010).

Kotler's seminal definition of a product with core, tangible and augmented features, was adapted by Wanhill (2008) so that the 'core' attraction product has been changed to what he calls the 'imagescape'. This is shown in Figure 2.4 below

Figure 2.4 The Attraction Product



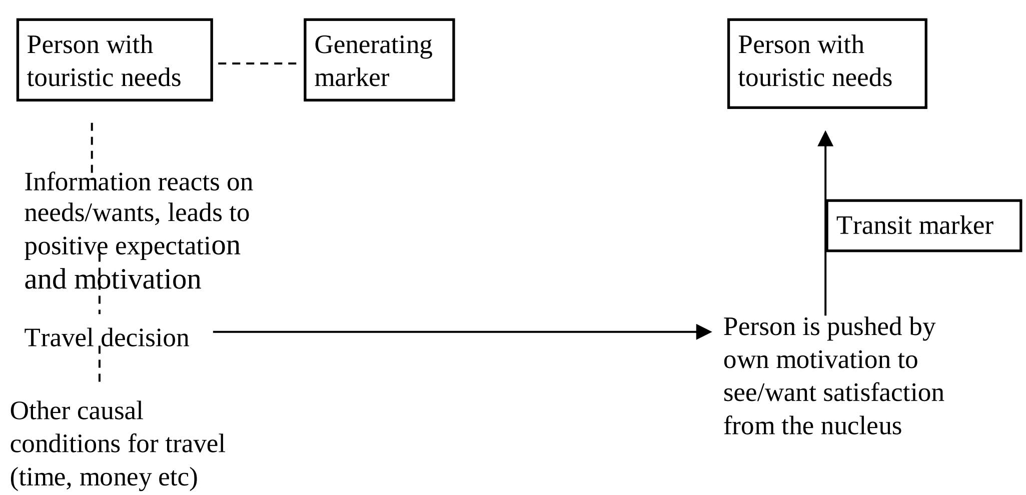
(Source: Wanhill in Fyall *et al* 2008, p18)

Here, the term 'imagescape' is used to describe the main experience that potential visitors could expect to get at that attraction. "*Failure to convey the imagescape to the market in terms of the product offer and how to consume it, will lead to under-performance and possibly project failure*" (Wanhill in Fyall *et al*, 2008 p19). All attractions can have some sort of physical presence, even if only the castle ruins at an un-staffed heritage site, but many have a strong service element to them (Swarbrooke, 1999), and can therefore be linked to the definitions that include this combination of tangible goods and intangible service products. Several key factors can therefore be identified when considering the visitor attraction as a service product, based on Swarbrooke, (1999) p36/37:

1. *the crucial role of the staff in producing and delivering the product – whether it is the ride operators at a theme park or the support staff at natural attractions that maintained the footpaths and cleared up the litter;*
2. *the production process can involve the customers - particularly heritage attractions and museums, where each person's experience can be influenced by their own attitudes, experiences and expectations;*
3. *service products are not standardised - the product changes to reflect the service, the deliverer, the customer and the resource on which the product is based e.g. a theme park attraction experience could be affected by the weather and the attitude of staff;*
4. *the product was perishable - it is produced and consumed at the same time e.g. a seat on an airplane ceases to be a product to be sold once the plane takes off;*
5. *the product is intangible - it cannot be taken away or experienced in exactly the same way again e.g. the night's sleep in a hotel room;*
6. *the surroundings of the service delivery process are a feature of the service - they must be functional and attractive to the customer.*

Authors such as Leiper (2004) have questioned the way that the term 'attraction' is used in the tourism context, suggesting that it has undertones or literal suggestions that it somehow draws or pulls tourists like a magnet. A more comprehensive definition may be that suggested by MacCannell (1976 p41): "*a tourist attraction is an empirical relationship between a tourist, a sight and a marker – a piece of information about a sight*". Leiper also refers to Gunn's (1972) hesitation in using the word 'sight', which has obvious connotations to the idea of something to be 'seen' by people, and for which Gunn substituted 'nucleus'. Within the context of a systems approach to tourism studies, Leiper (2004) therefore proposed the following model of tourist attraction system with three elements: "*a tourist or human element, a nucleus or central element, and a marker or informative element. A tourist attraction comes into existence when the three elements are connected*" (Leiper, 2004 p318), as shown in Figure 2.5.

Figure 2.5 A tourist attraction system



(Source: Leiper, 2004)

As with other more complicated products, the attraction product can be difficult to apply to the basic needs-wants-desire model of consumer behaviour (Blythe 2009). Two people may both need a relaxing holiday, but for one, they want a sunny, seaside resort, whilst the other's idea of a break is an action-packed adrenalin-filled adventure type holiday. As Leiper (2004) notes, this difference is highly relevant to studies of tourism and leisure behaviour. A hierarchical approach (Swarbrooke, 1999; Stevens, 2000a; Leiper, 2004) can help when classifying attractions into three categories: primary/secondary/tertiary (Table 2.3)

Table 2.3 Three tier classification of attractions

	Primary	Secondary	Tertiary
Swarbrooke (1999)	Main reason for taking a leisure trip	Visited on the way to or from a primary attraction	Little prior planning before visit
Leiper (2004)	Influences a tourist's decision to visit a place	Know about before the person visits but doesn't influence the itinerary	Something unknown pre-visit but discovered by the visitor
Stevens (2000a)	'Must see' or destination attraction	Those of regional importance	Smaller, local attractions

(Source: The author, 2015)

Youell (1998) describes a possible grouping of man-made attractions under a number of themes (Table 2.4)

Table 2.4 Themes for man-made attractions

Heritage attractions	Facilities that evoke past events, or through displays of artefacts and memorabilia
Museums and ancient monuments	the conservation of historic attractions or collections related to past events e.g. the British Museum and the Louvre
Theme parks	places that offer an exciting experience in purpose built, themed settings. Also includes other themed entertainments, catering and retail outlets
Entertainments	theatres, concert halls, nightclubs, discos
Sports facilities and events	a strong motivator for tourism trips
Leisure shopping venues	out-of-town retail complexes and shopping malls, including historic areas such as Chester
Wildlife	zoos and aquariums as well as botanical gardens

(Source: Youell 1998, p35)

It is clear from the literature that there is consensus on a need for there to be a variety of attraction products and experiences to suit the various demands of the different consumers. Different people have different needs and not all attractions are relevant to everyone, as typified by Timothy's

(2005, p 1) recount of the female visitor to Volcano National Park Hawaii who was overheard to say, "*get me out of this irritating natural stuff and back to the mall*"

When discussing the attraction product, a significant development is that of the study of heritage attractions, a sector that had seen phenomenal growth since the 1980s (Prentice, 1994; Drummond and Yeoman, 2003). Hewison (1980) set the scene for future studies of the heritage 'industry', a sector that he believes had developed for several reasons. In particular, there was the desire to look back at past times when the world was a seemingly better place to live in, often with rose tinted glasses and a sense of nostalgia for lost times. Other societal changes are linked to the availability of greater disposable income and increased leisure time and a heightened public awareness of 'heritage' sites being lost through new developments. Government and other organizations have also identified the potential value and benefits of 'heritage' within a programme for economic development, aided by technological advances providing easy access to greater depths of information on heritage attractions. In this context, Walsh-Heron and Stevens (1990) raise the cautionary note that the increasing concentration on interpretation and presentation of sites can have such an impact that visitors may be drawn to the spectacle of the techniques and media used rather than the core attraction product which could eventually become peripheral in appeal. This could result in confusion or a disconnect between the core product and the experience (Neuhofer, 2016). This leads to the possible issue of attractions simply becoming venues for other activities, events or performances. Whilst many of these may be wholly appropriate, such as mediaeval archers at an historic castle, it can be easy to fall into the trap of staging un-related activities that can detract from the original sense of place purely to attract more visitors in order to generate income (Prentice, 1993).

Williams (2006) highlights the postmodern issue of hypereality in relation to attractions, where the attraction product could in fact be a pastiche or representation of the true elements. Lascaux II (www.lascaux.fr) is clearly presented as a facsimile of the original – the life size imitation of the original cave interior in south west France was created in order to help save the original from environmental damage caused by having too many visitors, and this is clearly explained to visitors. It has now been joined by Lascaux 3, a touring exhibition, and Lascaux 4, a high-tech modern version which opened in December 2016. Yet sometimes there can be a blurring of the lines between real and simulated experiences (whether intentional or not). In South East Wales, for example, the Rhondda Heritage Park's re-created underground tour, which is an above ground facsimile, when compared with the actual underground experience of a trip down the original lift shaft at Big Pit National Mining Museum. The National Trust's decision to transport the 1930s mining equipment from the Halkyn Mine in North Wales to Dolaucothi Gold Mines in Carmarthenshire was done to improve the visitor experience at the Gold Mines (National Trust, 1987), yet the explanation to visitors that what they see at Dolaucothi today is not the original, but how it *might* have looked, is fairly low key and not always clearly made. This issue of authenticity in the tourist experience and how it relates to the actual product or thing that is experienced, is particularly relevant in cultural encounters (Chhabra, 2012; Mkono 2012) where it is important to clearly distinguish between the original, the authentic reproduction and the imitation or parody.

Most visitor attraction products can therefore be more closely linked to the service model of product delivery, since, as described earlier, what most visitors expect to get at an attraction is an experience or emotion, perhaps more than something physical and tangible. Although they can in many cases, be physically connecting with the historic remains or theme park ride, this is not something that visitors can take away with them as they can with a tangible product such as a souvenir or gift (although this also would serve as a link to the experience). These tourism experience products therefore conform to many of the characteristics of services in that they are intangible; heterogeneous; inseparable and perishable (Cowell, 1986). Each visitor attraction has its own special attributes and features that make it unique, which only serve to compound the issues relating to service quality (Campos, 2016). For larger organisations operating attractions at multiple sites, such as The National Trust, local authorities and the Merlin Group, as well as larger visitor attractions such as theme parks and zoos, staff training is a key part of ensuring consistency of approach for the interaction between staff and visitors in all areas, from admissions to retail and catering. The idea of customer-orientated service quality can best be enshrined in a 'visitor ethic' (Drummond and Yeoman, 2003), and is dealt with later in this chapter when investigating other issues relating to the service product. Having an agreed definition of 'attractions' is useful for management and research purposes (Fyall *et al*, 2008) yet as noted previously, it is probably impossible to devise one all-encompassing definition (Holloway, 2009). There remains another issue closely related to this, which concerns problems not just with the definition(s) of what is an attraction, but also the variety of ways in which the attractions can be classified to form a typology.

2.7.1 Typology of attractions

The classification of attractions described by Leask (2003) incorporates differences in ownership, location and facilities, but apart from built/natural does not include detail on the different types of attractions based on what they actually are. Visit Wales lists attractions based on the following: historic properties; museum/art gallery; industrial/craft attraction; country park, garden, other natural; wildlife attraction; themed attraction, leisure park/centre; railway/tramway (Welsh Government, 2015). According to Wanhill (in Fyall *et al* 2009), at the most basic level, there is little new in what attracts visitors - natural wonders and the creations of human society are still the main appeal. The huge variety of different attractions and ownerships, especially in different countries, therefore make a simple classification extremely difficult. In seeking to define and classify attractions, several issues have been raised concerning typologies, with various criteria or elements suggested for inclusion, as shown in Table 2.5.

Table 2.5 Typologies of attractions

Author	Typology	Comment
Lew 1987	Three attractions perspectives: (i) ideographic listing of attractions; (ii) organizational perspective incorporating capacity, special and temporal scale; (iii) cognitive viewpoint examining visitors' perceptions and experiences	Based on a review of the research methods that had been used to study tourist attractions
Walsh-Heron and Stevens 1990, p3	The attraction management should: '(i) perceive and recognize itself to be a tourist attraction; (ii) promote and market the attraction publicly; (iii) provide on site management and staffing; and (iv) be recognized as a tourist attraction by the visitor'	Aimed at attraction managers, includes some relevant issues, but doesn't cover unmanned sites
Inskeep 1991	(i) Natural attractions that are based on features of the natural environment (ii) Cultural attractions that are based on humans' activities (iii) Special types of attractions that are artificially created	An approach based on, and incorporating tourism planning and sustainable development also linked to the needs of local communities
Swarbrooke 2009 p5	Attractions can be split into four main types: (i) Features within the natural environment (ii) Human made buildings, structures and sites that were designed for a purpose other than attracting visitors, such as religious worship, but which now	Included reference to mega events and non-permanent attractions. The first two can be said to be under threat from tourism, whilst the other two see

	attract substantial numbers of visitors who use them as leisure amenities (iii) Human made buildings, structures and sites that are designed to attract visitors and are purpose built to accommodate their needs, such as theme parks (iv) Special events'	tourism as a positive opportunity to be developed
Nyaupane and Andereck, 2014	Focused on activities of visitors to cultural heritage sites and events. Subgroupings based on motivations and experiences of visitors.	Typologies for events and attractions are distinct

(Source: The author, 2015)

Despite a lack of academic agreement, it is clear that researchers have persisted in attempting to suggest typologies. Wanhill suggests a classification with at one end of the scale, attractions built specifically for visitors, and at the other, "*resources and facilities that are neither for visitors nor can be adapted for them"* (Wanhill, in Fyall *et al* 2009 p33). Swarbrooke (2009) highlights the fact that many of the categories are not mutually exclusive, and the boundaries can often overlap. He also cites the example of cathedrals and churches built on pilgrimage routes to religious shrines – these could be considered as meeting the criteria of point 3 of his typology in Table 2.5. The relevant issue for the managers of these sites today is that these buildings were constructed for the needs of visitors of a different time, and the requirements and expectations of some modern-day visitors/tourists are perhaps quite different from their predecessors, with additional tourism infrastructure, visitor facilities and interpretation being seen as the norm (Holloway, 2009; Xu, 2010).

A classification of attractions can also be developed reflecting issues such as ownership, size, type, location and visitor numbers. A visitor-orientated classification could focus more on other factors such as the benefits gained from visiting them, for example: having a new or different experience; learning something new; value-for-money; good levels of service; easily accessible (Swarbrooke 2009). Visitors can also be looking for, or evaluating secondary factors to the main visit such as catering and retail. Leask (2003) describes a classification which helps to illustrate the complexity of the attractions marketplace, with the range of operators and variety of factors affecting the product itself. These range from the obvious tangible features to the intangible aspects of a service product and the experience that the visitor has at any attraction during a specific visit. Another classification is that of price and Visit Wales and other national tourism bodies continue to include lists of the 'top ten' free entry attractions or 'top ten' attractions with an admissions charge. Ownership can be a key element in the way that an attraction is managed or developed, especially in terms of revenue yield and management ethos (Leask 2008), yet once again terms such as third sector, public or private have different meanings in different countries, making international comparisons difficult. In all cases, the only criteria seemingly consistently used for developing a ranking of attractions is the total number of visitors. Little or no mention is made of visitor experience or quality (however they may be measured) which would seem to be an obvious omission when compared with other league tables, such as those for schools or universities for example, which include elements based on subjective comment and feedback. This issue is relevant to the user generated content of TripAdvisor reviews for example - whereas accommodation and restaurant listings include questions on service quality and value, there are no such options for attractions (things to do). Yet the overall ranking scores can still lead to a comparative rating that may suggest that the overall visit, or experience may be 'better' at one attraction compared with another. A ranking of an attraction as 35th out of 35 in a particular geographic area may suggest that it is the least popular in that area, when in fact it may just have had fewer reviews compared with a well-reviewed attraction with a plethora of negative appraisals.

Issues relating to visitor experiences and the attraction 'experiencescape' are raised by Frochot and Batat (2013), who describe how value typologies can be introduced or developed to help classify attractions in this way. Holbrook (2006) uses a variety of criteria to develop a value classification that focuses on the 'extrinsic' (linked to service elements and other objectives) or 'intrinsic' (the experience of consumption itself). Such value typologies are described in a study by Sheth *et al* (1991), identifying five consumption values: functional; social; emotional; epistemic; and conditional. These clearly link to the experiences sought by visitors, whether on a conscious or subconscious level, and therefore to motivation. As described later in this chapter, the notions of 'flow' and immersion in the context of tourist satisfaction can contribute to understanding of the tourist experience, especially in the context of destination image (Frochot and Batat, 2013).

Attempts to relate value to specific elements of the visitor attraction experience have led to some of the factors listed in SERVQUAL and its attraction spin-offs such as Lynch's (2007)

ATTRACTQUAL as described later in this chapter. VisitScotland's visitor attraction quality assurance scheme gives attractions a grade from one to five stars depending on their quality assessment score. It could be possible therefore to produce a league table of attractions in Scotland based on their star rating. Since 2014, attractions in Wales participating in the VAQAS Cymru scheme have been given their total percentage score at the end of the assessment visit, and it could therefore be possible to produce a league table of these attractions based on their scores, if these were made public or shared between attractions.

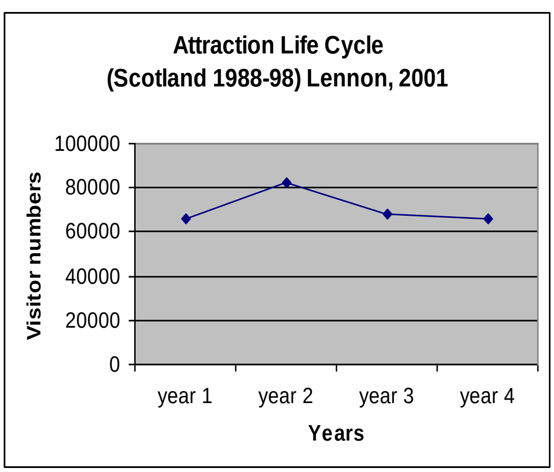
2.7.2 Product life-cycle

Closely linked to any analysis of issues associated with 'product' is the theory of a product life cycle - the basic model of which was developed to show the relationship between manufactured goods and their market (Butler, 1980; 2005; Brassington and Pettitt, 2006; Kotler *et al*, 2010; Baines *et al*, 2011). It suggests that products pass through several stages during their lifetime and that this has a direct impact on product management:

INTRODUCTION – GROWTH – MATURITY – DECLINE

The relevance of this to the attractions industry is that it can be used as a potential framework for analysing the factors behind the development, growth and decline of an attraction. An attraction life cycle is described by Lennon (2004), based on a study of attractions in Scotland, where the different stages were clearly identified over a period of time, as shown in Figure 2.6.

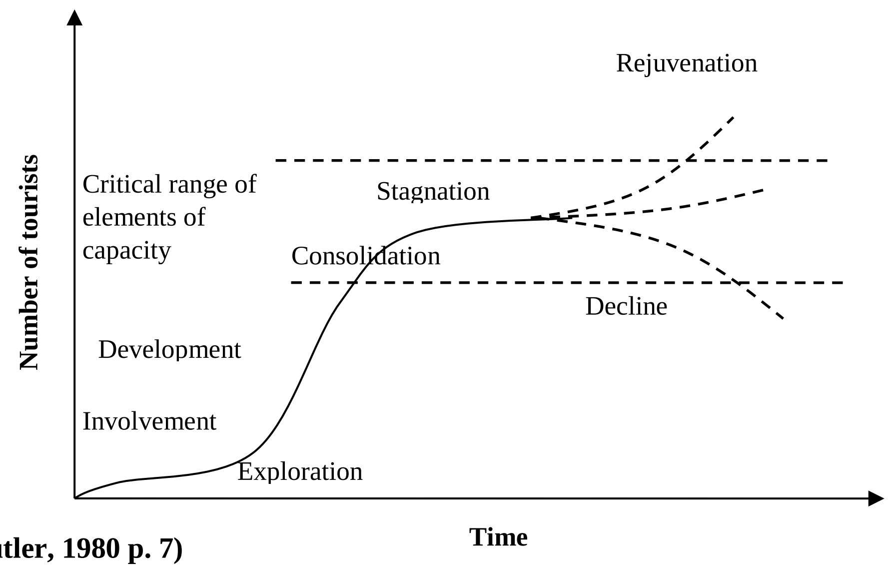
Figure 2.6 Attraction life cycle for Scottish attractions 1988-98



(Source: Lennon, 2004 p342)

The product life cycle concept can be applied to tourism destinations, through the linked stages of: Exploration; Involvement; Development; Consolidation; and Stagnation / Decline / Rejuvenation (Butler, 1980; 2005 ; Mason, 2006). The various stages reflect the growth in tourism development and increase in visitor numbers to the destination, as shown in Figure 2.7.

Figure 2.7 The tourism area cycle of evolution



(Source: Butler, 1980 p. 7)

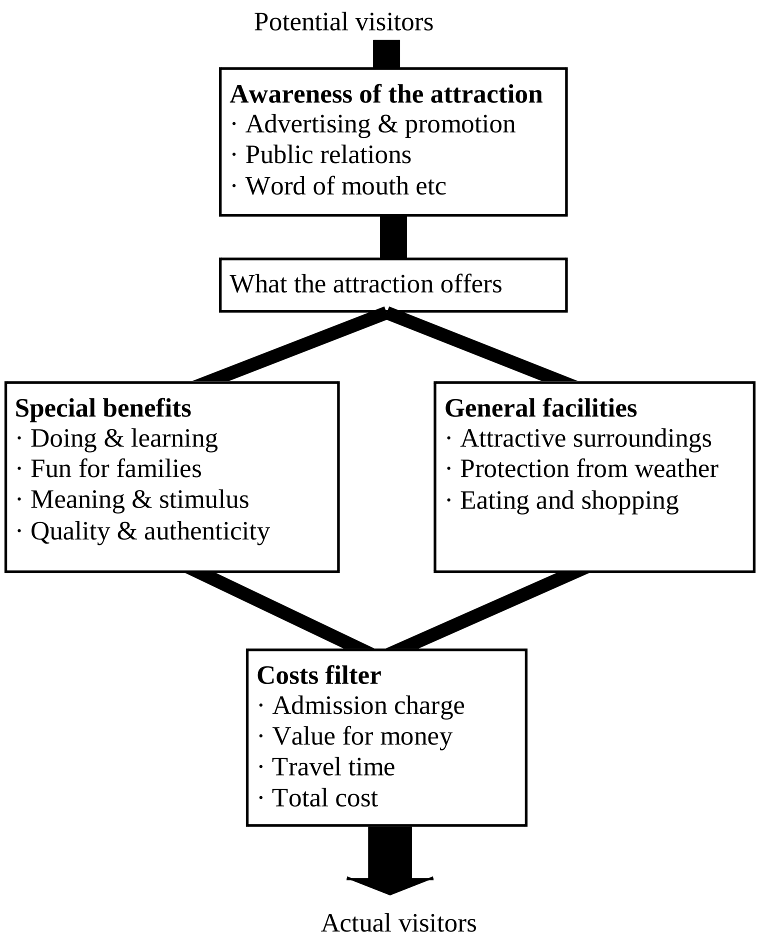
The product life cycle model is most easily linked to attractions that have been developed specifically to attract visitors (Swarbrooke, 2009). This model relates particularly to large attractions, and typically sees an increase in visitor numbers in the early stages due to media coverage and high levels of communication or advertising activity due to the need to recoup investment in a relatively short period of time. The span of the life-cycle can be relatively short, even just a few years, as new competitors enter the market place or technological changes bring in new developments. Without product improvements or additions, the product can quickly go into decline. According to this standard product life cycle model, products can, at some stage of their decline, be disposed of or 'killed off' when they are no longer generating a satisfactory rate of return. Not all attractions will follow this trend however, since other factors could influence the decision-making process – for example loss making local authority museums could be kept open since closure would be politically and socially unacceptable. Other, usually small, privately owned attractions can also stay open long after they became economically unviable because they are run as lifestyle businesses or even hobbies by their owners. Swarbrooke (2009) states that the product life-cycle for purpose-built attractions is usually bimodal, since it can be relatively straightforward for a theme park to add a new ride or for a heritage site to bring in a new method of interpretation or display that could bring in a boost to visitor numbers (both depending on availability of finance of course). But his assertions about the difficulties of fitting the model to places that didn't initially start out as visitor attractions, such as cathedrals or natural landscapes, can be questioned, since the starting point could be taken as the time that they started to become managed as visitor attractions, not when they originally opened. This would be more than just a change of emphasis, rather a tipping-point where the fundamental purpose of the site had changed significantly, and even with sites such as ancient monuments, where the key purpose may be the preservation of the building or remains, they are still managed as visitor attractions and therefore the product life cycle and visitor experience could be relevant to managers.

Within this discussion of the attraction product, it is pertinent to briefly refer to branding in the context of attractions. Some attraction products such as Disney's theme parks, The National Trust and Alton Towers are well established brands within their own sectors and wider afield. "*A brand is a name, term, sign, symbol or design or combination of them intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors*" Kotler *et al* (2010 p78). A strong brand helps customers quickly identify a particular product that they recognise and trust. However, according to Swarbrooke (2009), branding as a whole is weaker for the attractions sector compared with other parts of the tourism industry. This is mainly because it can take a long time to develop a strong, positive brand image and it is an expensive process. Some attraction products have been fortunate to evolve into brands over time such as Folly Farm in West Wales and St Fagan's near Cardiff. In the case of the latter, despite several official name changes including 'The Welsh Folk Museum' and 'The Museum of Welsh Life', it is still referred to by many people in Wales by the name of the village where it is located – St Fagans. (Thomas, 1998). Indeed, the National Museum Wales eventually embraced this in 2014 and changed the name to 'St Fagans: National History Museum' (www.museumwales.ac.uk/stfagans).

2.8. Promotion

Promotion in the marketing mix generally refers not to any price discount or special discount promotion such as BOGOF (buy one get one free), but rather to publicity and advertising (Kotler and Keller, 2011). In the attractions context, it can apply to the publicity efforts made by places to attract visitors though leaflets, posters, adverts, and other means of getting the attention of potential visitors. Discounts on admission charges and special price offers can play a part in this, but are covered in the section on price as they are basically price discounts. The importance of how the visitor experience is portrayed and communicated to visitors is a crucial element in this situation (Sorensen and Jensen, 2015; Kim, 2016). As a prelude to the promotional process linked to visitor attractions, it is worth considering briefly the decision-making process and consumer behaviour models that may be behind any visit. Swarbrooke (2009) refers to motivators and determinants that influence and play a part in the individual's decision-making process of whether to visit an attraction (Figure 2.8).

Fig 2.8. The individual decision-making process



(Source: Leisure Consultants 1990, cited in Swarbrooke 2009 p 72)

As noted in the section on 'product', Leiper (2004) mentions 'markers' in his classification of attractions and describes these markers as the linking elements between tourists and the attraction or 'nucleus' they are visiting. He believes that they could stimulate motivation and tourists' decision on where to go, and that they are part of wider itineraries and plans of what to do each day. These markers can also assist with the identification of an attraction or its parts, and they can form images which may help tourists remember past experiences and provide meaning.

2.8.1 Push and Pull factors

It is also suggested that tourists are motivated to visit an attraction when it "*reacts positively with needs and wants*" (Leiper, 2004 p 318). Tourists are 'pushed' to the attraction by their own motivation rather than any supposed 'pull' of the attraction itself. This is supported by the description of the psychological model of tourism motivations developed by Iso-Aloha (1980), although Mason (2006) also believes that this use of 'push and pull' may have underestimated a more complicated process. Putting these into a travel and tourism context, Baloglu and Uysal (1996 p 32) state that: "*push factors are considered to be socio-psychological motivations that predispose the individual to travel, while the pull factors are those that attract the individual to a specific destination once the decision to travel has been made*".

2.9. Price

Tribe (1998) examines the function of price in a tourism market economy, linked to the notions of supply and demand, and how price for certain tourism products such as package holidays can fluctuate due to other factors. He describes the relevance of price elasticity of demand in relation to heritage visitor attractions for example, where the supply can be inelastic, in that many heritage attractions are unique and cannot be replicated. Yet many have free entry or relatively low admission charges due to the fact that they lie within the public sector and one of their remits is to share the opportunity of visiting with as many people as possible. This can sometimes result in pressures due to having to cope with excessively large numbers of visitors to 'must-see' attractions. Careful management of visitor flows at sites such as the tomb of Chairman Mao in Beijing and the Sistine Chapel in Rome was necessary to deal with the resultant excess demand (Swarbrooke, 2009). The performance benchmark for many free entry museums may be more on the visitor profile than visitor numbers alone, and they may have had a remit to try and bring in more non-traditional museum visitors (for example) than looking at total visitor numbers in isolation. It must be noted that charging an admission price can be used to regulate or alter visitor patterns. Theme parks provide a good example here, where price discounts may be offered at different times of the day, when demand may be less, in much the same way that off-peak rail travel operates strategically.

Other pricing issues include the cost of developing sites, particularly heritage-related attractions, in the name of visitor enjoyment, which has been used as a reason for introducing an admission charge (Walsh-Heron and Stevens, 1990). The process of 'commodification'[19] of tourist facilities is highlighted by Shaw and Williams (1995) with examples including the private purchase of Land's End and development of visitor facilities, with a resulting admission charge to parts of the coastline that were previously free to enter. Where such sites were once considered to be in the 'public realm' such as landscapes or even publicly owned ancient monuments, there can often be considerable public criticism or objection to the level of control (e.g. only open at certain times) or the price of admission, when they may previously have been open for longer or with a lower entry charge. Such developments have brought these attractions into the domain of the consumer market when they can be classified as paid-for-products (Drummond and Yeoman, 2003). Williams and Shaw (1992) had previously described this notion of the 'commodification' of places as being done either through controlling access and having an admission charge, or by offering other commercial services linked to the visit such as catering and retail, often referred to as secondary spend. These issues can have a direct impact on the visitor experience. Having to pay for entry to a previously free site may provoke negative feelings, whilst new and improved visitor facilities may enhance the visitor enjoyment of an attraction, generating positive feedback.

This aspect of income generation and revenue from trading and other activities led to a realisation that small museums, craft galleries, shops, leisure facilities and farm attractions, to name but a few, were crucial to the economic well-being of many areas of the country (Stevens, 2003; Morrison, 2013). Together they can form the 'critical mass' of attractions in a locality that constitute the basis for encouraging tourists to explore and perhaps stay overnight (Youell, 1998 p116). In other words, whilst individually they may have only a minor effect on the local

[19] The process of transforming something into an object that can be traded

economy, collectively their worth and impact can be considerable. This factor, identified in the 'ecomuseum'[20] movement on the European continent seems to have been more widely accepted by tourism analysts working on destination management systems such as Visit Wales' www.dmwales.com where attempts have been made to bring the seeming plethora of attraction details together to provide a more co-ordinated 'whole' on one website (www.visitwales.com), as part of a wider destination management system. In this way, attempts can be made to put a 'price' value on the economic contribution of attractions within the tourism sector, and the economic impact that they may have. Closely linked to the issue of price or cost to visitors, are the factors of value, satisfaction and quality. These will be discussed later in this chapter.

2.10 Place

In marketing terms, 'place' can include a variety of key factors such as location or distribution channels, so that it deals with the way that a product can be sold in a physical location such as a shop, or online in a 'virtual' location, as well as the way that it reaches the consumer. In relation to attractions, the obvious elements are the physical aspects of the location and description of a place. An interesting facet of place in this sense is the seemingly modern approach in Western countries of appreciating natural landscapes. According to Leiper (2004), Confucius and others wrote of the beauty of mountains and the pleasures of nature, yet Europeans extolling the virtues of natural beauty in undeveloped landscapes were seen as unusual exceptions. Leiper continues this theme by describing the example of a house built in Geneva that had windows facing the street, but none that allowed the occupants to enjoy the spectacular views of the Swiss Alps from the rear of the property, since this was seen as unnecessary at that time. Walsh Heron and Stevens (1990) cited 'location' as the most important factor for any new visitor attraction. Yet as Lennon (2004) points out, for most heritage attractions and even some museums, there is, often little if any element of choice in the decision-making process relating to location. Many historic buildings, ancient monuments and churches have become popular visitor attractions despite being difficult to get to. The importance of location can be a fundamental factor in the success or otherwise of more commercially-orientated (usually larger-scale) attractions such as theme parks

[20] Originating in France in the 1970s this movement identified that there was a significantly higher impact than previously realised resulting from the contribution of many small individual cultural and community projects when considered together

(Smit, 2002), but there are also examples of farm diversification projects where proximity to an existing or developing holiday destination has enabled new attraction businesses to be developed – for example Folly Farm and Oakwood Theme Park in Pembrokeshire. This apparent paradox is also covered by Wanhill (2008), where he describes the ideal path of the three components in attraction development as:

MARKET ⟶ IMAGESCAPE ⟶ LOCATION

It is perhaps only in a few cases, however, where this path can be truly followed, since most attraction developments are constrained by their type and location as well as ownership. Prentice (1993) found that the 'market areas' or travelling time of visitors and day trippers to most heritage attractions in particular are actually quite localised. Place has been examined as a factor in literary tourism (Tetley, 1998; Herbert, 2001), with the importance and relevance of authenticity being highlighted – again the different experiences and satisfaction of individual visitors varies according to their motivation for visiting and expectations. In terms of comparing the physical elements of an attraction with its online presence or digital 'place', the websites and social media links of selected Welsh attractions were investigated as part of this PhD thesis. Apart from occasional examples such as Blum and Fallon (2001), little attention appears to have been given to this aspect of the online presence of attractions, although there is a growing study of such online tourism issues, especially in relation to the co-creation of experience (Leung *et al*, 2013; Buhalis *et al*, 2015; Campos, 2015; Sigala, 2016). Taken to its extreme, online provision could see the development of a virtual attraction that exists only online (virtual reality headsets), or a virtual element that co-exists with the physical. One example of the latter is the Digital Zoo (www.digitaldjurpark.se), an EU funded project with Lycksele Zoo, Sweden. Fahlquist *et al* (2011, p 171) report that:

> "*the idea behind the Digital Zoo is to share information and create and retain relations with future, current and past visitors. One of the goals for the Digital Zoo project has been to enhance the visitor's experience of the zoo, making the zoo experience something more than just a visit to the actual park*"

For the vast majority of attractions however, it is the physical location that remains the key element for people to visit and experience.

2.11 People

In marketing terms 'people' generally refers to customers or consumers – those who purchase or use the product (Palmer, 2009), and in the attractions context, the focus is usually on the people that visit attractions, with the resulting segmentation of visitors by different types. The different management priorities of the people (staff) at attractions is mentioned in other sections of this work, such as when discussing typologies of attractions and ownership. Some are straightforward in that many museums and galleries were primarily established to conserve and preserve their collections and allowing people to see them is sometimes seen as a secondary objective (Swarbrooke, 2009, Holloway 2009). The National Trust has, at various times, stopped or restricted public access to certain parts of the Lake District in order to aid conservation of the landscape. The need to generate income or make a profit may also influence the way that attractions are managed, again based on organisational priorities. The owner-operators of smaller attractions that are micro-businesses[21] may have a different outlook on the way that they operate and see their decision to do what they do as a lifestyle choice. Since the main aim of the research was to see how operators of all types perceived and understood the visitor experience, it was deemed worthwhile therefore to examine in more detail the understanding of this 'people' element as it related to visitors and their motivations.

According to Swarbrooke (2007), tourism can be divided into subtypes that group different elements together. Although this can differ in subjective approach, there are themes within tourism activity that stand out, such as visiting friends and relatives (VFR); travelling for mainly business or religious reasons; or health tourism, which was one of the historic motivators for people being sent to the Alps (clean air) or the seaside from the U.K. in the nineteenth century. There are also categories for educational and cultural tourism, whilst social tourism is mostly seen in European countries and is based on the premise of social benefits to the individual justifying state support or subsidy. Special interest and activity tourism can be linked to personal preferences or the specific interests of individuals and is also referred to as hedonic consumption (Kerrigan *et al*, 2004). The primary motivation for people to be involved in tourism activity can therefore be quite varied (Holloway, 2011) and this stretches the basic marketing model of needs-wants-

[21] Micro businesses are enterprises that have fewer than 10 employees

desires. Despite this, it must be highlighted that it is only in relatively recent times that the experiential marketing models have been considered and applied in the context of visitor attractions (Williams, 2006; Ritchie *et al*, 2011).

Following on from the idea of tourism motivational factors, it is evident that visitor attractions can welcome a range of people going to each one for different reasons and experiences. Even within a designated category of visitor types, there can be individual differences. For example, within the group of museum-goers, Leiper (2004 p332) notes that there are "*those that are content with superficial impressions and at the opposite end are those who spend time studying the paintings, often consulting a guidebook, discussing the works with a companion or tour guide*". In describing a potential classification of tourists, Callaghan (1994) refers to the attitude and expectations of tourists to their trip. He describes the concept of play instead of leisure, further suggesting that the interests or activity a person chooses are linked to their environment, mood and age. He summarised the work of Cohen (1979) and Plog (1991) in a way that has many similarities with later models of consumer behaviour and experience-seeking (Table 2.6)

Table 2.6. The characteristics of tourists

	Cohen (1979)	Plog (1991)	
Non-institutionalised traveller	Drifter Explorer	Allocentric	Adventurer in search of novelty
Institutionalised traveller	Individual mass tourist	Mid-centric	Individual travel arrangements made to destinations which are in the process of becoming better known and more familiar
	Organised mass tourist	Psychocentric	Package holiday maker who seeks familiarity

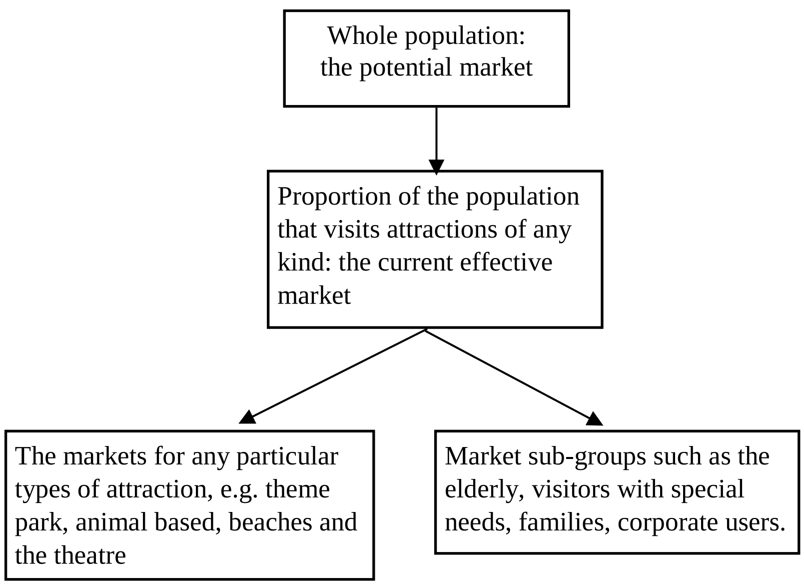
(Source: Callaghan *et al*, 1994 p 6)

Further work in this area includes that of Swarbrooke (2007) who compared 11 different typologies in chronological order from Cohen (1972) to Wickens (1994), highlighting the fact that whilst there were others in addition to these, there were common threads that could be identified in each. In general, most seem to bring tourists together based on their specific experiences in terms of the destination or where they go; the things that they do whilst there; and the difference between package holidays and independent travellers. Although many were based on non-empirical studies, such typologies can help in the segmenting of markets, as described in the next section.

2.11.1 A market segmentation of attraction visitors

Market segmentation is a way of splitting the potential or actual market for a product or service into sub sections or groups, whose members show similar needs, characteristics and buying behaviour (Kotler *et al*, 2008). This was updated to: "*the need to identify groups of buyers who respond in a similar way to any given marketing stimuli*" (Palmer, 2009 p180). If a 'market' can be described as being made up of anyone who is interested in a particular product (Baines *et al* 2011), then it is possible to develop the concept of a market for attractions, as suggested by Swarbrooke (2009) as shown in Figure 2.9.

Figure 2.9 The hierarchy of attractions markets



(Source: Swarbrooke 2009 p68)

The marketing model of: segmentation – targeting – positioning (STP) (Brassington and Pettit, 2006; Baines *et al*, 2011) can also help identify a product or organisation's position in its business environment and relationship to its competitors. However, the main ways of identifying different types of customers remain relatively straightforward and well established, and arguably, can be adapted to attractions (Figure 2.10).

Figure 2.10: The basis of identification of different types of attraction for visitors

- Geographic – the location of the attraction and the people that may want to visit it e.g. a primary attraction will draw people from a wider travelling time
- Demographic – sub-dividing groups according to age, sex, ethnicity
- Psychographic – differences in attitudes and opinions, including social class and lifestyle
- Behaviouristic – types of buyers e.g. first time or repeat visitors; benefits visitors are seeking from an attraction.

(Source: Adapted from Swarbrooke (1999); Kotler *et al* (2008); Blythe (2009); Palmer (2009).

The relevance of these different categories is that whilst it can be a generic approach in some cases, to a certain extent, they can help identify experiences sought or desired from those within the different groups. At its simplest level, geographic classification relates to catchment areas and travelling distances of visitors. How far people travel to visit an attraction helps towards the distinction of primary, secondary and tertiary in terms of the scale of the attraction and its reach or pull in attracting visitors. The number of potential visitors can be linked to the size of the catchment area both in terms of resident population and the seasonal holidaymakers staying in the area. A large theme park, for example may attract people from a 3-4-hour drive time, whilst even some 'national' museums may still have only a fairly local draw in terms of drive time, if the size and nature of the attraction itself is of a specialist interest. The National Woollen Museum at Dre-Fach Felindre in West Wales, for example – despite having 'national' in the title, is a relatively small attraction that might otherwise be in the tertiary category. The important issue of geographic location of the attraction was also referred to in the section on place.

Demographic classification is a well-established factor within the attractions sector where according to Swarbrooke (2009) certain trends have been identified, leading to simple categorisations such as: stereotypical museum visitors (well-off older people) and theme parks (younger generation). The Saga Group started with organising holidays exclusively for the over 50s for their cruise trips and other holidays and then diversified with great success into insurance products (www.saga.com). Demographic segmentation is still valid but has had to take account of wider changes in society, leading to new classifications based more on consumer lifestyles, experiences sought and discretionary spending power (Baines *et al*, 2011). Applying this segmentation to attractions may not be possible in all cases, but there have been some experiments at art galleries and museums for events such as ‘over 50s’ nights (www.watfordmuseum.org.uk). Perhaps when considering the visitor experience as a motivational factor for visiting, then demographics should perhaps no longer be seen as such a crucial factor as it once was in segmenting visitors (Prentice *et al*, 1998; Patterson and Pegg, 2009).

Classifying people by lifestyle or personality characteristics – according to ‘psychographic’ characteristics has been a technique that has, traditionally, focused on social class distinctions. However, the relevance of this has been questioned more recently and disposable income as well as wants and desires of consumers (Blythe, 2009) has become more pertinent. There is recognition that income-based analyses have not always portrayed a reliable picture for leisure visitors. For example, someone on a small income may have small outgoings and a strong desire to go on an expensive holiday and visit lots of attractions, while someone on a high income might have high outgoings and little disposable income. Despite this observation, classification by (income assumed) occupation has been widely used within the U.K. since the 1920s and although this has been superseded by other social changes, it continues to be used by many marketers for its simplicity and clarity (Palmer, 2009), as shown in Table 2.7.

Table 2.7 Class category in the U.K.

Class category	Occupation	% of population (NRS Jan-Dec 2016)
A	Higher managerial, administrative and professional	4
B	Intermediate managerial, administrative and professional	23
C1	Supervisory, clerical and junior managerial, administrative and professional	28
C2	Skilled manual workers	20
D	Semi-skilled and unskilled manual workers	15
E	State pensioners, casual and lower grade workers, unemployed with state benefits only	10

(Source: NRS, 2017)

This system of demographic classification based on social grade and occupation, was originally developed to classify newspaper readers in Britain in 1956 by the Joint Industry Committee for National Readership Survey (JICNAR). It has since then been adapted several times, although many of the core characteristics remain similar (NRS, 2017).

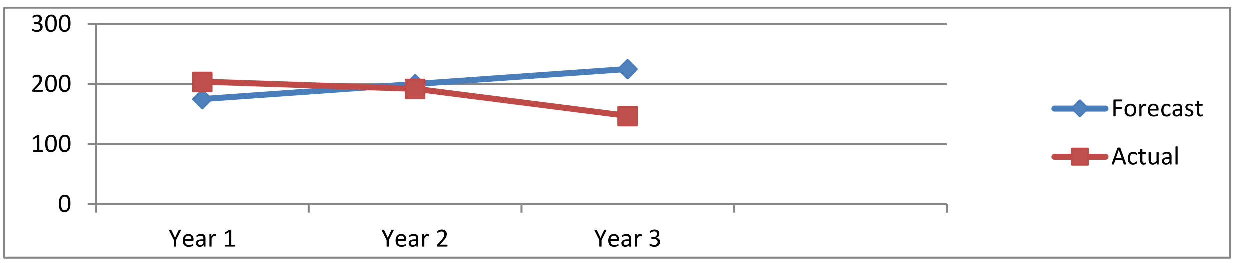
It is through using this classification, perhaps more than others, that many attraction segmentations have tended to stereotype visitors in the past, and many museum visitors continued to be described as ABC1 (Visit Wales, 2011) and the National Trust have a very clear idea of the background and lifestyle of their ‘typical’ member (Palmer, 2009).

In the twenty-first century, geodemographic segments have become more popular as a form of classification, combining elements of previous other categories. This has also reflected changes in understanding behaviour based on disposable and discretionary income, so that for example students were once included in category E above, but this did not reflect their importance to mobile phone companies who found that their spending on new technology was far in advance of any other segment (Blythe, 2009). Acorn (www.acorn.caci.co.uk) and MOSAIC (www.experian.co.uk/products/mosaic) are examples of modern commercially available approaches to segmentation that provide a wealth of information on consumer classifications and lifestyle habits.

Behaviouristic segmentation has perhaps been understood and utilised most by theme park operators, but lesser explored by many other types of attractions. It is similar to the psychographic segmentation and looked at the reasons why people visit attractions, and what they expect to get from their visit. Understanding these motivations can play a key role in developing repeat visits as well as getting more first-time visitors. This also includes developing an understanding of the motivations for visiting, and the visitor experience.

Many of the above categories have arisen from developments in market research studies on consumer behaviour such as the values and lifestyles (VALs) framework developed in America (www.strategicbusinessinsights.com/vals). This focused on a psychographic segmentation to help companies develop or adapt their products to suit the needs of those consumers most likely to buy them, and by identifying changing societal needs. Shaw and Williams (1995) describe the relevance of this to understanding tourist behaviour using the broad categories of motivation such as ‘need driven’, ‘integrated’, ‘outer-directed’ and ‘inner-directed’. A fundamental difficulty with market segmentation, however, is that by its very nature it sought to pigeon-hole people into categories that they did not always fit naturally, and they did not always stay in their segments. People’s needs, wants and desires change, and markets can be dynamic, responding to societal and other changes, so that when attempting to predict visitor numbers to attractions, lifestyle and demographics are not necessarily as reliable as for other aspects of consumer behaviour. (Prentice *et al*, 1998). If segmentation is about identifying and satisfying people with similar needs, it can be complicated by those with varying degrees of the same need: "*some consumers may treat satisfaction of one particular need as a high priority, whereas others may regard this need as quite trivial*" (Palmer, 2009 p181). This helps to identify one of the weaknesses in many feasibility studies that can arise when setting visitor targets - how likely were all those who said they were interested in a particular type of attraction ever likely to visit it when completed? There are some clear examples of attractions in South Wales (as with many other parts of the U.K.) that have fallen short of their initial pre-opening targets, despite having visitor number projections based on market research. The National Botanic Garden of Wales provides a readily-accessible example (Figure 2.11)

Figure 2.11 NBGW visitor numbers (ooo's) - target and actual. Source from 2000 (year 1) to 2003 (Year 3)



(Source: Wales Audit Office 2005)

Attempting to predict changes in consumer/visitor behaviour, particularly in relation to the expected or desired experience is therefore fraught with difficulty (Morrison, 2013; Quadri-Felitti and Fiore, 2013). Some trends can, however, be identified, as outlined in the next section.

2.11.2. Social changes and visitor experience

As aforementioned, significant changes in society such as those following the industrial revolution, have played a contributing factor to the growth of modern day mass tourism. For many British people in the late nineteenth and twentieth centuries, a visit to the seaside or countryside was considered preferable to going to a museum or art gallery (Swarbrooke, 2009). There have also been changing patterns in what people find attractive and want to visit. According to Leiper (2004), Western enjoyment of beautiful landscapes was a fairly recent phenomenon, and only since 1800 had there been a noticeable change in human consciousness. With respect to this, Leiper (2004, p14) remarks, "*while it may be human nature to seek pleasure, the sorts of experiences that are regarded as pleasurable have changed over time as a result of cultural changes in society*". Mason (2006) refers to the work of the German planner Christaller, who described how tourist areas had grown and developed, affected by changing social and other factors, which in turn was highly relevant to the attractions in those areas. Destinations can change over time in response to the different types of visitors at different times. Allied to this are changes in the visitor experience and the involvement of locals. Shaw and Williams (1995) concurred with this point, stating that cultural change can also be facilitated by tourism developments.

The places that people visit may have certain clear historical or social themes, such as the site of a battlefield, that have been long accepted as places to visit, but there has been "*a fundamental shift in the way in which death, disaster and atrocity are being handled by those who offer associated tourism 'products'*" (Lennon and Foley, 2004 p6). There is a social appetite for learning and understanding more about the past, and in today's increasingly digital and information-rich society, there is a need to acknowledge and address the expectations of modern visitors and to consider how those expectations relate to the type and range of facilities that are provided at the places they visit. A visit to even a relatively small castle such as White Castle in South East Wales, now offers visitors a downloadable 'app' for mobile phones that gives them an additional audio experience to enhance their visit with more details of the past lives and experiences of people in the castle. These changes in expectations and the need to respond to changing visitor needs has been described as a 'continuum' of typical roles for staff working at heritage attractions, as suggested by Johns N (in Drummond and Yeoman, 2003, p220). It highlights how the main role of attractions staff has changed over time:

CUSTODIAN – CONSERVATOR – EXHIBITOR – INTERPRETER – EDUCATOR – ENTERTAINER

In examining the way that the visitor attractions sector has developed, particularly in the U.K., there is evidence that there are still major differences in the way that attractions are developed or started in relation to market forces or societal changes (Fyall *et al*, 2008). Pine and Gilmore (1999) refer to the 'experience economy' in a part of post-industrial society, where there is a restructuring of the production system to create value added marketing experiences. This concept is perhaps more clearly defined by the work of Brown (2010) on postmodern marketing, yet as stated previously, the term postmodern had already been applied and become popular in the tourism industry especially in the context of heritage attractions (Hewison, 1987; Misiura, 2006).

Tourism can have negative socio-cultural impacts, as described by Youell (1998), this includes factors such as overcrowding, and the distortion of local customs and traditional industries. This can also lead to negative impacts on native languages and the breakup of communities, as well as changes in behaviour. According to Mason (2006), as far back as the 1970s, growing concern over negative effects of tourism on a region led to the development of an irritation index (Irridex) by Doxey, which highlighted the impact of visitors on the host society (Shaw and Williams, 1995). Although Doxey's work was not based on any empirical research, it added to the study of interactions between tourists and hosts, as shown in Figure 2.12.

Figure 2.12 Doxey's irritation index

Euphoria – visitors are welcome and there is little planning

↓

Apathy – visitors are taken for granted and contact becomes more formal

↓

Annoyance – saturation is approached, and the local people have misgivings. Planners attempt to control via increasing infrastructure rather than limiting growth

↓

Antagonism – open expression of irritation and planning is remedial, yet promotion is increased to offset the deteriorating reputation of the resort

(Source: Mason, 2006 p 22)

A relationship is also argued to exist between the type of customers (visitors) and the nature of the attraction itself through the idea of benefits being sought, as shown in Table 2.8.

Table 2.8. Customer characteristics and benefits sought

Customer characteristics	Main benefits sought
Elderly people	Economy, passive activities; nostalgia; easy access
Families with young children	Entertainment for the children; special children's meals in the catering; economy
Adventurous personalities	Excitement; challenges; new experiences
Health - conscious	Exercise; healthy food; clean and safe environment
Fashion – conscious	Status; being seen at a fashionable attraction or taking part in a fashionable activity
Car driver	Easy access by road; good or inexpensive parking; lack of traffic congestion
Urban dweller	Peace and quiet; contrast with home environment; aesthetically pleasing environment.

(Source: Swarbrooke, 2009 p 47)

The trend towards societal marketing has been seen as an approach with beneficial factors towards the culture and environment of particular places or destinations (Christie-Mill, 1996). According to Drummond and Yeoman (2003), societal marketing can be different from traditional marketing in a variety of ways such as managing demand rather than just seeking to increase it, and emphasising meaning and fulfilment as part of the experience rather than only concentrating on facilities and services. They refer to the creation of individual experiences rather than a standardised product and in this way, there are parallels with the 'customerisation'[22] approach in consumer behaviour (Jobber, 2009; Palmer, 2009; Kotler, 2010; Baines *et al*, 2011). The attractions market is therefore dependant on changes in the consumer behaviour of visitors, originating from a variety of sources, both product and consumer led (Swarbrooke 2007). One of the major issues in discussing changes within the sector is that there has been a paucity of longitudinal surveys over long periods of time that gave the data necessary for further study and analysis. The Wales Tourist Board, now Visit Wales, has described trends in each of its annual surveys of visitor attractions since 1979, but as highlighted later in Chapter 3, the surveys are sometimes only representative of less than half of all attractions in Wales, so it is unclear if this gives a true picture of the sector as a whole.

Hewison (1987) observed that changes in social attitudes were particularly noticeable in the heritage attraction sector. As traditional manufacturing and industries had disappeared in the

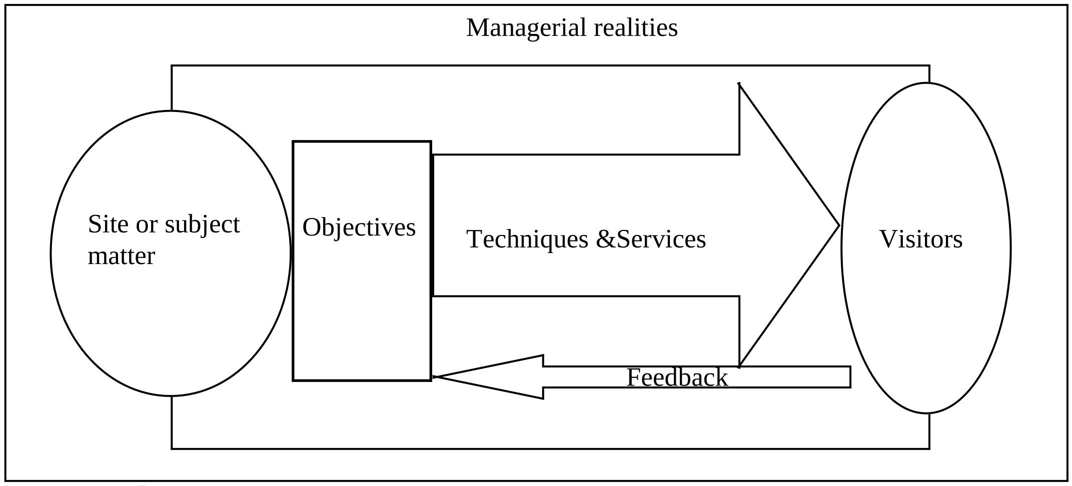
[22] Customerisation is the process of customising products or services based on interaction or dialogue between an organisation and its customers on a one-to-one basis

U.K., there had been a growing nostalgia for industrial heritage, and even manufacturing. Values were being replaced by those of the service industry and there was a move away from the manufacture of physical products towards the development of experiences. However, this had also been associated with the more recent technology driven societal changes identified above, so that heritage attractions in particular are now more likely to offer ‘dynamic experiences’, or be the venue for exciting living history re-enactments, in addition to the basic historic remains or artefacts in a museum that may be their core feature. Thus, perceptions of quality have moved, and the main part of the visitor experience is now just as likely to come from high-tech interpretation or trained staff, as from the place or exhibit itself (Misiura 2006). The way that these various factors interact to influence the visitor experience can be seen as part of the ‘process’ element in marketing models, as explained in the next section.

2.12. Process

Leiper (2004) refers to a process theory of tourist psychology, where there is a link between a visitor’s needs and the place that can, possibly, satisfy those needs. According to Mason (2006) Leiper’s earlier work, showing tourism as a form of system had been too simplistic, yet the idea of such a system (Fig 2.5, p 34) is, perhaps one element of process that can be identified relating to people, visitor experience and attractions. The identification and understanding of such systems is important in the management of attractions, and once again the marketing process context of providing the right product to the right people. In discussing the management of heritage attractions, Drummond and Yeoman (2003) describe the ‘interpretive’ approach, which seeks to define what is to be presented; why the attraction needs to be developed or changed; who is being targeted by the presentation (bearing in mind any audience needs and expectations); and how the attraction is to be presented (the overall concept). All these factors contribute to the visitor experience. Cherem (1977) concentrates on elements of the visitor experience in his description of the process of interpretation of tourist sites. A theoretical model was developed to illustrate the interaction of elements taking place between a particular tourist site and visitors (Figure 2.13). Eelements of this model were determined to form a key part of developing a model to describe the interaction between Welsh visitor attraction operators’ and the online visitor experience. This is developed further in Chapter 6.

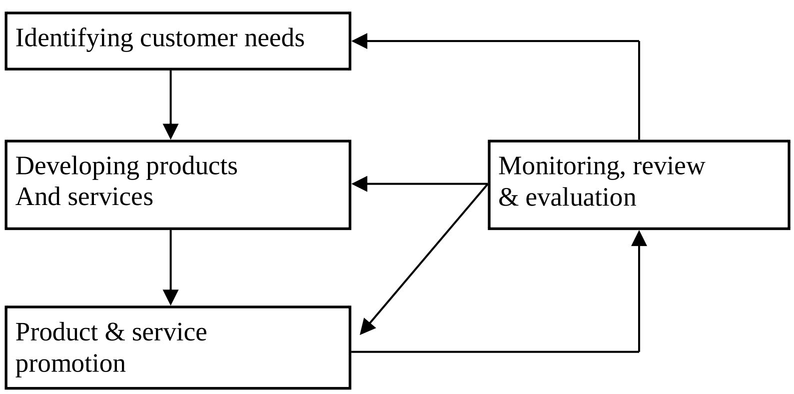
Figure 2.13 A model of interpretation



(Source: Cherem, 1977 p 6)

This model was reviewed by Ververka (1998) with greater emphasis on the experience of visitors as part of the process involved in providing or supplying the interpretation product. The concept of a process is developed further by Youell to show the interaction and relationship between the marketing related activities taking place in tourism, but which could also apply to visitor attractions (Figure 2.14).

Figure 2.14 The marketing process in tourism



(Source: Youell, 1998)

The 'monitoring, review and evaluation' in Fig 2.14 has a similar function in part, to that of the 'feedback loop', in obtaining responses from customers on their satisfaction with the product or service (Jacobs, 2010). "*Feedback is central to the adaptive capabilities for competing in a radically changing and uncertain world*" (Hax and Wilde II, 1999 p24). In any product/customer situation, feedback on customer experience is essential for several reasons, including satisfaction and further possible product development. Markey *et al* (2009) categorise customers into three groups: promoters; passives; and detractors; and highlight the importance of feedback and understanding customer needs in order to develop more ‘promoters’. It is claimed that being aware of the issues raised by customers can help an organisation to anticipate and deal with those issues before they become major problems (Kyte and Ruggie, 2005). One mechanism for obtaining and monitoring customer comments is the feedback loop: “*in its simplest form the feedback loop consists of four elements: a referent standard or goal; a sensor or input function; a comparator; and an effector or output function”* (Klein, 1989 p151). Any breakdown in obtaining feedback, or poor-quality information, can result in incorrect conclusions being drawn, or ‘misperceptions of feedback’ (Sterman, 1989). Examining the interactions between visitor attraction operators and their visitors through a critical analysis of the management of visitor comments and feedback is one of the objectives of this PhD study, specifically in the context of online environments and the geographical setting of Wales.

2.13. Environmental (business/economic factors)

In addition to the need to obtain visitor feedback, attraction operators must also be aware of the wider business environment that may affect them. In the countries of Western Europe, there have been some similarities in the historical development of types of attractions, yet Swarbrooke (2009) points out that there were also differences emanating from specific factors within different countries such as the varying levels of economic development and disposable income, and variations in infrastructure frameworks such as public transport. There are also differences in national culture, as well as natural environment and built heritage. Swarbrooke (ibid) maintains that perhaps the most significant difference between some countries has been the extent to which tourism has developed based upon incoming overseas visitors in contrast with any local or domestic demand. Factors outside the control of operators have included changes in government policy, for example in the levels of VAT (value added tax) being charged; reductions in business rates for small businesses; and the introduction of free entry to national museums when there was previously a charge (Swarbrooke, 2009). Even for well-established heritage attractions, the business environment can change quickly, as highlighted by Misiura (2006), reflecting changes in visitor tastes or needs. Attractions need to take account of these changing factors – "*organisations that remain static in a dynamic environment experience strategic drift and are likely to fail*" (Tribe, 1995 p6). Yet given the fact that many attractions are based, or highly reliant, on their location or core product, how feasible or realistic is it to expect them to make significant changes, even if these are necessary to meet changing markets and visitor expectations? At one level, superficial changes could be fairly straightforward such as implementing new interpretative techniques that could dramatically change the visitor experience. Yet these again could be subject to funding constraints or part of a bid for external funding that may be reliant on increasing visitor numbers. Bodies such as Visit Wales recognise this, and it is possible to apply for funding to safeguard existing jobs instead of the necessity of just creating new ones. MALD[23], the Welsh Government's body for Museums and Libraries, also have in their funding criteria in 2016 elements focused on improving the visitor experience at museums and galleries. Many improvements to develop the visitor experience are based on utilising the latest technology, and this will be explored further in the next section.

2.14. Technological

The use of advances in technology for most attractions is either related to developments in interpretation and presentation, or operational issues such as the day-to-day use of computers and systems for management and communication. Operationally technology could be used for such things as ticketing systems, also linked to online purchase of tickets; and office computers which can be used to administer and facilitate management related operations. Developments in digital marketing mean that for effective communications, attractions of all sizes should have their own website and digital presence in the form of free opportunities for communicating with visitors such as Facebook or Twitter accounts (Dimotikalis, 2015). These are of course not mandatory, but as part of their marketing efforts, attractions should be making the most of the possible opportunities for getting their message across to potential (and repeat) visitors. Third party website listings such as www.visitwales.com and TripAdvisor can be invaluable tools in developing a digital presence and are discussed in more detail in a later section of this chapter, as is the use of technology in the co-creation of online experience. Digital developments include the

[23] MALD, the Museums, Archives and Libraries Division of the Welsh Government, changed its name from CyMAL in 2015

options for online ticketing, pre-booking tours or visits, and by providing virtual access to museum collections. In addition to using technology for p.o.s (point of sale) information in the shop, and stock control, simple marketing details such as postcodes of visitors can be collected on a daily basis to build up information on visitor patterns. Even small attractions should be able to develop their own quite sophisticated databases of invaluable information which can be used as a management tool and to inform future marketing activities.

Other technological developments are linked to interpretation, such as digital audio tours, although there is always the danger of using some technology 'for the sake of it'. The National Waterfront Museum in Swansea has used technology to provide 'virtual' access to information on its collections since it opened in 2000, with specific artefacts used as focal points for telling a particular story, but there has been anecdotal evidence that some visitors consider it an over-use of digital technology and preferred a visit to the museum stores (open only every Wednesday) where they can walk around the larger exhibits of old vehicles and memorabilia, and have a good experience even without any interpretation. However, the potential offered by technology for virtual tours online as well as enhancing the actual visit with sights and sounds is immense, especially as the cost of much of this new digital technology continues to fall. The only danger may be that the method overtakes the message, and that the 'hypereality' referred to by Williams (2006) means that the simulation can in fact take over from the real thing in providing the visitor experience, once again raising issues of 'authenticity'. An example of this was the original Jorvick Viking Centre (York), where the interpretative experience of the 'ride through time' in the 1980s became more popular for visitors than the actual archaeological content of the site (Hewison, 1987). In dealing with visitor experiences in this context, the issue of quality merits further investigation.

2.15 Quality issues in attractions

U.K. legislation has on the whole tended to tackle most issues relevant to attractions through a strong emphasis on consumer protection laws, but there has also been a move since the late 1990s to make tourism businesses more aware of the quality of the experience that they offer (Kim, 2014; Buhalis and Foerste, 2015). Quality management at attractions can be linked to standards such as BS5750 and ISO9002[24], but there are sometimes practical difficulties in applying them specifically to attractions (Swarbrooke, 2009). Membership of schemes such as VAQAS[25] in England and Wales has been voluntary, although many larger attraction operators such as the National Trust and English Heritage also have their own quality guidelines. Quality issues in attractions have related not only to product quality and the service element of the product, but also other issues relevant to business operations and economic survival: *"use of quality tools and techniques to gain advantage and, in some cases, to survive"* (Drummond and Yeoman, 2003 p 17). Whilst this is mentioned specifically in the context of heritage attractions, it can be equally valid across the range of attractions operating on a commercial and not-for-profit basis. Models such as SERVQUAL (Parasuraman *et al*, 1988) can help close the gap between understanding customer expectations and the service experience at attractions. Developed in the early-mid 1980s, the SERVQUAL model of service quality is based on interviews in four service sectors of credit cards; retail banking; securities brokerage and maintenance and repair of products. The variations between expected and perceived performance and quality of service were investigated. It was suggested that the model could be used to assess trends in service quality in each dimension: tangibility; reliability; responsiveness; assurance; and empathy. Having been widely adopted initially, there were some criticisms of the model especially in the tourism context (Frochot and Batat, 2013), yet despite this, there have been a variety of spin-offs of this service quality model applied within tourism.

Misioura (2006) describes the development of HISTOQUAL, which was applied to historic houses and included such things as how potential visitors are made aware of the attraction, and how their expectations of the various facilities such as catering and retail, are dealt with on site. These factors were also included in the VAQAS scheme in England and VAQAS Cymru in Wales which concentrated on benchmarking quality issues at visitor attractions of all types. Table 2.9 provides a summary of the key points of each of these schemes.

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[24] These are the British and European standards relating broadly to quality of products and systems
[25] Visitor Attraction Quality Assurance Scheme

Table 2.9: a comparison of SERVQUAL, HISTOQUAL and VAQAS

	SERVQUAL	**HISTOQUAL (Misioura 2006)**	**VAQAS**
Tangibles	the physical facilities	Catering, retail	Condition of buildings and visitor facilities – catering retail, toilets. Promotional literature, website.
Reliability	how well the org. delivers the promises made in the name of customer quality	Does the attraction meet customer expectations?	Information for visitors, interpretation
Responsiveness	how far the org. is prepared to go to meet the needs of its customers	What are the future plans of the org. in response to visitor feedback?	Dealing with visitor enquiries, telephone calls
Assurance	the level of knowledge acquired by staff (through training) which benefits customers	Quality of service	Efficiency and effectiveness of staff
Empathy	level of care and individual attention offered to customers	Skill and expertise of staff and volunteers dealing with visitors	Levels of customer care

(Source: The author, 2015)

An important difference in the above models is that whilst the first two use groupings of questions put to visitors/consumers to get quantitative responses, the VAQAS scheme uses a scoresheet completed by trained assessors to arrive at a quality score for each attraction representing the visitor experience. A further model, ATTRACTQUAL for attractions was based on the SERVQUAL principles, and proposed by Lynch (2008). It was however, based on a relatively small sample of responses (133) from visitors to 4 man-made attractions in Victoria, Australia and Lynch acknowledged the shortcomings in data collection and suggested that further research on a wider scale was needed. A limitation of these models relates to cultural issues, and Morgan *et al* (2010) highlight the Western viewpoint of the frameworks as opposed to the collectivist. PAKSERV was developed by Raajpoot (2004) as a more suitable alternative for Asian cultures, by using additional focus groups to further investigate the nature of the quality of experiences of visitors from Eastern cultures. There were also queries raised about the applicability of such models within the Chinese tourism sector. Therefore, unlike the accommodation sector, there has never been a compulsory legal or other requirement for the visitor experience at attractions to be formally assessed or inspected in any way, other than perhaps during the statutory local authority planning stages that may involve change of use, or for building regulations approval or food hygiene inspections where relevant. The VAQAS scheme in Wales mentioned above, is a voluntary scheme that replaced previous versions such as the Wales Tourist Board's 'Star

Attraction'. Scotland was the first U.K. country to adopt its own attraction quality assurance scheme, introduced with the agreement of the Association of Scottish Visitor Attractions (ASVA) in 1995. The scheme was developed with three primary objectives: (i) to provide the public with the means to identify visitor attractions which provide the desired quality; (ii) to help attraction operators to market themselves more effectively through the official independent endorsement; (iii) to encourage and acknowledge improvements in standards throughout the industry (Go and Govers, 1999).

VAQAS Cymru is similar to the scheme in Scotland and mirrors the scheme developed in England in the late 1990s. All of these have their origins in a SERVQUAL style grouping of factors, albeit with the collection of data completed in a different way. In Wales, feedback on assessment visits is provided through oral debriefs and written reports, but the score-sheets used by assessors to objectively rank different aspects of their visit was never shared with the attraction operators until 2014. This had been one of the moot points about the scheme, with some attractions wanting their quality 'score' to be made public, whilst others were wary that they may be seen to be under-performing compared to similar attractions in terms of quality measured. In 2014 the decision was taken to provide individual operators with their scores in England and Wales. Whilst the scores continue to remain confidential, there appear to be no plans for using them publically as a means of benchmarking performance within the industry other than on an informal, ad hoc basis done through cooperation between attractions. The relevance of the scheme to this PhD research is simply in the fact that there exists a framework of gathering, albeit confidential information on quality aspects of the attraction experience and feeding that back to the attractions and their owners or operators, in an impartial and objective way. The scheme looks at attractions as they are on the day of the assessment visit, and there is no commentary as to whether attractions may have been under- or over-performing in terms of visitor numbers or income generation. This is seen as being outside the scope of the scheme, but the assessors are supposed to give advice to attractions on how they may be able to improve certain aspects of their product or service relating to visitor experience, if a specific weakness is identified by the assessor. The final percentage score given to attractions under this scheme can therefore, be seen as a quality rating in terms of quantifying visitor satisfaction, Defining what is actually meant by the words ‘quality’, ‘tourism’ and ‘experiences’ is a complex issue, often because of the way that they are used in different ways by different people and organizations. “*Quality tourism experiences is a term imbued with multiple meanings and interpretations, depending on who is using the term and why, as well as where and when it is being used*” (Jennings *et al*, 2009 p 303). This leads to the need for a more detailed review of how these terms are used when investigating the attraction experience.

2.15.1 Quality, value and satisfaction

Perceived value is an important aspect of quality described by Sanchez *et al* (2004), who developed the GLOVAL model as a scale of measurement within a global context. Although this is biased towards an examination of the wider tourism package on offer through travel agents rather than any specific mention of visitor attractions, it demonstrates that perceptions of value in relation to the tourism product can vary between customers and cultures and is also closely linked to time. Chen & Chen (2009) focus on the area of heritage tourism and the way in which the variables of perceived value, satisfaction and service quality are linked to the intentions and behaviours of tourists. Rather than the service quality emphasis of the SERVQUAL model, they investigated the experience quality in the context of heritage tourism and suggest strategic directions for heritage managers, so that through engaging and involving visitors, their quality of service and experience would be improved, leading to increased satisfaction, perceived value, and ultimately visitor loyalty. These issues were also identified in the earlier work by Chen & Tsai (2006), who state that their examination of perceived value and overall satisfaction of tourism destination trips is evident as:

destination image → trip quality → perceived value → satisfaction → behavioural intentions.

Zabkar *et al* (2010) also concentrate on these factors in their model investigating the perceived quality of a destination’s offerings and how this can be used to predict behavioural intentions: “*a destination’s offerings should be moulded in an ongoing process of evaluating visitors’ quality perceptions regarding destination attributes*” (Zabkar *et al*, 2010 p 544). This knowledge can be used to manage or influence destination offerings and is particularly important when developing awareness and visitors’ perceptions of a destination pre-visit. Improving ratings of specific attributes of the destination can lead to increased awareness, positive perceptions and repeat visits.

Nowacki (2009) notes that benefits gained may in fact be a more important factor in the context of behavioural intentions, than satisfaction of the product from the service provider. The relationship between expectations, satisfaction and customer loyalty in the tourism (travel agency) sector is analysed by Bosque *et al* (2004). They briefly mention the role of 'image' in the process of visitor expectations and draw comparisons with a range of established marketing literature in this field but fail to investigate the crucial part played by branding, which is surely a significant factor when dealing with travel agencies. For first time visitors to an attraction, the role of branding can be linked to awareness, so that visitors may have some pre-conceived ideas about a National Trust property for example, especially if they had already visited one elsewhere, compared with a possible lack of awareness of what to expect at an individual attraction, that they may have only heard about through publicity material or a website. Gallarza & Saura (2004) used a similar approach to investigate perceived value dimensions in tourism, this time in the travel behaviour of Spanish university students. They found validity in Holbrook's (1999) model of consumer value and the way it can be used by tourism operators to improve their knowledge of the expectations of tourists (visitors) and suggested that: "*variation in individual perceptions and product attributes can thus provide insights into segmentation and positioning strategies through the value multidimensional concept*" (Gallarza and Saura, 2004, p 449). The implications for attraction operators being the possible use of social value and service issues to promote the visitor experience, rather than elements such as efficiency and quality which may be more relevant for accommodation providers.

The significant role of perceived value and a link to behavioural intention is also noted by Cronin *et al* (2000) in a study of six industries ranging from sports, fast food, healthcare and long-distance carriers. There is an indirect link through customer satisfaction, between service value and behavioural intention. Repurchase intentions amongst cruise passengers was linked to satisfaction, quality and perceived value by Petrick (2004); whilst behavioural intentions and service quality of festival visitors' satisfaction was examined by Cole and Illum (2006). Re-visit intention and satisfaction of festival visitors experience was described by Cole and Chancellor (2009), as shown in Table 2.10.

Table 2.10 Quality, value and satisfaction of tourism experience

Author	Topic	Predominant factor(s) identified
Petrick 2004	Quality, value and satisfaction in predicting cruise passengers' behavioural intentions	Quality
Mehmetoglu & Abelsen 2005	Examining the visitor attraction product	Tangible & ancillary features influence satisfaction
Cole and Illum 2006	Festival-goers satisfaction in relation to service quality and behavioural intention	Experience quality; mediating role of satisfaction
Cole and Chancellor 2009	Festival attributes that impact visitor experience, satisfaction and revisit intention	Entertainment quality
Maunier and Camelis 2013	Elements contributing to satisfaction in the tourism experience	Satisfaction and dissatisfaction; role of people
Correia, Kozak and Ferradeira 2013	Tourist motivations and tourist satisfactions	Push and pull satisfaction

(Source: The author, 2015)

Rowley (2008) mentions the issue of customer value in a digital context, as part of digital content marketing (DCM), where the customer can be actively involved in the co-creation of the experience, a factor which is explored in more detail later in this chapter.

As part of the gap-spotting review of literature, an exploration of PhD theses available online (www.ethos.bl.uk accessed January 2015 and October 2016) was conducted using the keyword searches: 'visitor/tourist attraction'; 'quality'; 'satisfaction'; 'value'; 'experience'; 'definition'. This identified a number of doctoral research studies that were deemed relevant to the context of this research (Table 2.11).

Table 2.11 Review of PhD theses relating to the research topic area

Author	Title	Review of content/findings
Tetley (1998) Sheffield Hallam	Visitor attitudes to authenticity at a literary tourist destination	Understanding visitor experiences at Howarth (Bronte Country)
Kelly (2000) Liverpool	Motivations and experiences of tourists at English cathedrals	Socio demographic profile; desire to see something different
Westwood (2004) UWIC	Narratives of Tourism Experiences: an interpretative approach to understanding tourist - brand relationships	Tourist consumption behaviour and experiences; branding
Marr (2007) Stirling	Work process knowledge in Scottish visitor attractions	Functionality of work patterns of staff at 6 attractions in Scotland
Guthrie (2007) Aberdeen	Sense making and sense giving: using visitor narratives to understand the impact of visitor interactions on destination image'	Meaning of experiences as narrative at Edinburgh and Greenwich
Daengbuppa (2009) Bournemouth	Modelling visitor experiences: case study of World Heritage sites in Thailand	Process and elements of experience construction; experience as a product of heritage consumption

Stone (2010) Central Lancashire	Death, Dying and Dark Tourism in Contemporary Society: A Theoretical and Empirical Analysis	Interrelationship between visitors and specific places they visit/attractions
Taheri (2011) Strathclyde	Unpacking visitor engagement: examining drivers of engagement in museums	Museum visitor's consumption and experience patterns
Thomas (2012) Glasgow	Battlefield tourism: meanings and interpretation	What battlefields mean to tourists and impact of interpretation on visitor experience
Oriade (2013) Salford	An Empirical Investigation Of The Relationship Between Perceived Quality, Value, Satisfaction And Behavioural Intentions Among Visitors To UK Attractions	Visitor experiences and intentions at Blists Hill and Alton Towers, identified 6 on site characteristics that influence visitors

(Source: The author, 2015)

In their discussion of visitor experience and motivation, all of the above have some relevance as a background for the issues in this PhD research, although only Marr (2010) specifically took the viewpoint of the attraction operators. The remainder concentrate on the visitor's experiences and opinions, which mostly focus on quality and satisfaction. Kim *et al* (2012) in their review of academic literature on the tourism product came to the conclusion that: "*satisfaction and quality alone are no longer adequate descriptions of the experience that today's tourists seek*" (Kim at al 2012 p 13. Exactly what is meant by the visitor experience therefore needs to be investigated further in order to better understand the relationship with the elements of satisfaction and quality in the tourism (attraction) service product. Experiential marketing themes including the 'experiencescape' (O'Dell, 2005; Mossberg, 2007) and co-creation of experience are considered in this context in Section 2.15.

2.16 The tourist experience

Whilst the VAQAS framework outlined above has been in use in Wales since 2003 as a measurement of the perceived service quality of attractions and visitor experience, there has been continuing emphasis on the need for further academic research into what constitutes quality experiences for visitors and how the elements of this were measured and analysed (Morgan *et al*, 2010, Ritchie *et al*, 2011; Rihova *et al* 2014; Kim, 2016). The experience of tourists, particularly when examining destinations, is a complicated intertwining of emotions, memories and experiences associated with a location (Noy, 2007). The attractions themselves create the essential parts of the experience by the way that they combine the presentation of place and culture (O'Dell, 2007). Yet the experience itself is significant for the individual and reflects psychological factors such as self-realisation and identity, as well as other issues of novelty/familiarity and authenticity (Li, 2000; Selstad, 2007). Patterson and Pegg (2009) describe the breakdown of the divide between tourism and leisure research on experience in their examination of the search by the 'baby boomer'26 generation to find new tourism experiences. They suggest that marketing segmentation should no longer concentrate on the established category of age but look instead at expectations to understand changes in demand for different types of tourism and leisure experience, a point made previously by Prentice *et al* (1998). In relation to consumer behaviour as explored with respect to general marketing and consumer experiences, Caru and Cova (2007, p 5) have argued that,

> "*the consumer experience is no longer limited to pre-purchase activities (stimulation of a need, search for information, assessment of availability) or to post purchase activities (assessment of satisfaction) but includes a series of other activities that influence customers' decisions and future actions*".

In examining research on tourist experience, Morgan *et al* (2010) draw on the work of Mannell and Iso-Ahola (1987) on leisure and tourist experience, to highlight four perspectives (Table 2.12).

Table 2.12: Four perspectives of tourist experience

The definitional approach	The identification of elements of the tourist experience
The post-hoc satisfaction approach	Focus on psychological outcomes and motivations
The immediate approach	The nature of on-site, real-time experiences
Business or attraction management approach	Focus on consumer theory and product offering

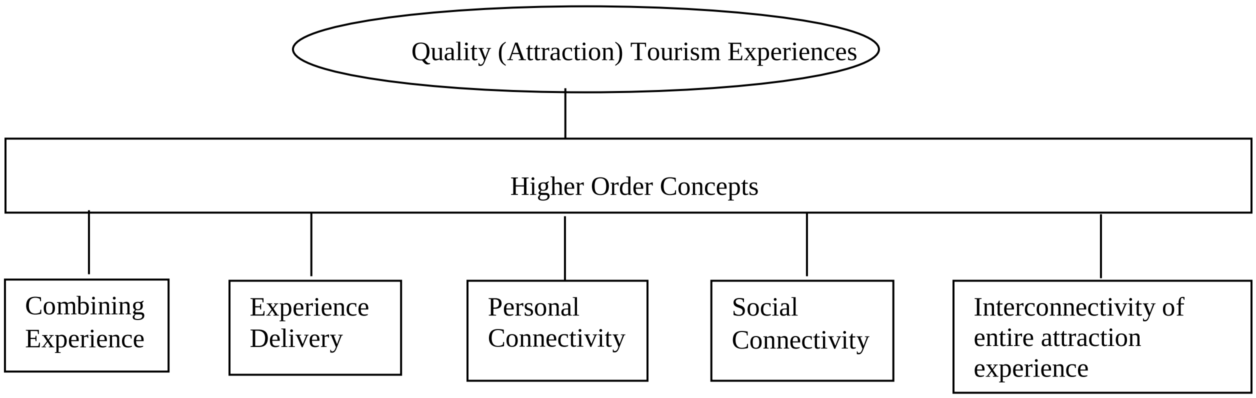
(Source: Morgan *et al* 2010 p 18)

The fourth perspective listed above places greater emphasis on techniques of management and the operation of sites rather than the significance for individual visitors, but still concerns itself with the experience. Drawing on the work of Jennings *et al* (2007) in adventure tourism, the need for evaluation tools and quality 'filters' is highlighted in order to understand the various elements in the quality tourism experience, to develop and maintain competitive advantage. This model for

26 Those born between 1946 and 1964, after the Second World War, a group that has more leisure time and disposable income than their parent's generation.

the quality tourism experience was adapted for visitor attractions to highlight the association of higher order concepts (Figure 2.15).

Figure 2.15: Higher order concepts associated with quality attraction tourism experiences



(Source: Adapted from Jennings *et al* 2007)

The interconnectivity referred to in Figure 2.15 relates to the various elements of the visitor experience and it is a theme identified in various ways by other authors: Black (2005) discussed quality and experience in relation to visitor involvement at museums; whilst Falk *et al* (2013) refer to the personal motivation for visiting museums and the way that different visitors experienced the same things. Quan and Wang (2004) describe the two main approaches to understanding tourist experience – the first based on a social science direction, and the second which had evolved from the marketing and management disciplines. In the first, the tourist is seeking something different in their daily lives, whilst in the second, the tourist is regarded as a consumer in a series of relationships based on commercial exchange (Mossberg, 2007). The work of Pine and Gilmore (1999) set the stage for the understanding of the crucial role that can be played by experiences in terms of customer value and experiential tourism. It can be said that an experience is created when "*a company intentionally uses services as the stage and goods as props, to engage individual customers in a way that creates a memorable event*" (Pine and Gilmore, 1999, p. 11).

An example of the way in which personalisation and packaging of the tourism product to provide exceptional visitor experiences is set out by the Canadian Tourism Commission to its partners: "*a tourism product is what you buy; a tourism experience is what you remember*" (Experiences, 2011, p4). However, Williams (2006) criticised the first version of the CTC campaign, stating that it was in fact "*not experiential marketing, as the media and approach are both from traditional marketing*" (Williams, 2006 p 486). The experience itself first needs to be understood, clearly defined, and positioned. Arnould and Price (1993) also point out that the expectations of customers themselves can also sometimes be unclear in the context of tourism experiences and, for example, the motivations for going white water rafting can vary from adventure/excitement to just wanting something different. This philosophy concerning engaging experiences and its impact on the positioning of tourism destinations is described by Richards (2001), whilst Prentice (2004) states that although it providers a valuable addition to the overall destination picture, the motivations and experiences of tourists are actually as varied as the destinations themselves, further complicating overall understanding.

Andersson (2007) proposes that the tourist experience occurs at the point where tourist production and tourist consumption meet. In this context, Pine and Gilmore (1999) in their 'four realms' model describe four key aspects of experience depending on the business offering and involvement of the customer: entertainment; aesthetic; education and escapism. At the centre of the destination's (or attraction's) development of these four aspects should be the essentially positive nature of the experience, leading to a memorable experience (Oh *et al*, 2007). Special events and other activities at attractions can have a key role to play in developing this core benefit, hence the drive by so many attractions to become venues for activities. Oh *et al* (2007) also found that Pine and Gilmore's four realms model (1999) could be used successfully to study experiences at bed and breakfast (B&B) lodgings, and also carried out a review of operators' investment priorities.

Whatever their type, there has been greater recognition that a visitor gets an 'experience' from going to an attraction, whether the type of experience felt was intentional on the part of the operator of that attraction, or not (Mossberg, 2007; Kim, 2016). Visitor attractions can create the essential parts of the experience by the way that they combine the presentation of place and culture (O'Dell, 2005; 2007). The experience of tourists when visiting destinations, is a complicated intertwining of emotions, memories and experiences associated with a location (Noy, 2007; Quadri-Felitti and Fiore, 2013). Yet, the experience itself is mostly subjective, and significant for the individual, reflecting the psychological factors of self-realisation and identity, as well as other issues such as novelty/familiarity and authenticity (Li, 2000; Selstad, 2007). Patterson and Pegg

(2009) suggested that marketing segmentation should no longer concentrate on the established category of age, for example, but look instead at expectations to understand changes in demand for different types of tourism and leisure experience. This point was also made by Prentice *et al* (1998) and Falk *et al* (2013) who referred to the personal motivation for visiting museums and the way that different visitors may experience the same things in different ways. Therefore, in relation to consumer behaviour in marketing:

> "*the consumer experience is no longer limited to pre-purchase activities (stimulation of a need, search for information, assessment etc) or to post purchase activities (assessment of satisfaction) but includes a series of other activities that influence customers' decisions and future actions*" (Caru and Cova, 2007, p 5).

Quan and Wang (2004) refer to the two main approaches to understanding tourist experience – the first, based on a social science direction, and the second, evolved from the marketing and management disciplines. In the first, the tourist is seeking something different in their daily lives, whilst in the second, the tourist is regarded as a consumer in a series of relationships based on commercial exchange. In this context, the work of Pine and Gilmore (1999) set the stage for the understanding of the crucial role that could be played by experiences in terms of customer value and experiential tourism. It could be said that an experience was created when "*a company intentionally uses services as the stage and goods as props, to engage individual customers in a way that creates a memorable event*" (Pine and Gilmore, 1999, p. 11). Building on this, Black (2005) discusses quality and experience in relation to visitor involvement at museums, and there has been a continuing emphasis on the need for further academic research into what constitutes quality experiences for visitors and how the elements of this are formed, measured and analysed (Morgan *et al* 2010, Ritchie *et al* 2011, Leask *et al* 2014). The earlier work on the philosophy behind experiential marketing by Pine and Gilmore (1998) is further developed by Williams (2006 p 483): "*experiential marketing is about taking the essence of a product and amplifying it into a set of tangible, physical, interactive experiences which reinforce the offer*." The emphasis here is on the message about the product, and how it is communicated: "*rather than seeing the offer in a traditional manner, through advertising media such as commercials, print or electronic messaging, consumers 'feel' it by being part of it*" (Williams, 2006 p 483). However, it can just as easily be applied to other tourism products, both in terms of the actual visit to a particular site and the marketing communications about the visitor experience itself. This is further illustrated with examples of dining experiences that Williams (2006) maintains had a strong and clear theme or experience. The development and popularity of Hard Rock Café and Planet Hollywood are compared with the U.K. pub chain Weatherspoons, which set out to offer a ‘traditional’ British pub atmosphere, with cask ales, low prices, long opening hours and no music, but which eventually has had to rely on competing mostly by price because its overall ‘theme’ experience in this context, was so weak in comparison. Frochot and Batat (2013) claim that Dublin’s Guinness Storehouse is an attraction that has successfully adapted most of Pine and Gilmore’s experience aspects to develop its attraction product offering to create a specific visitor experience with a strong core theme.

Psychological aspects of the tourism experience are dealt with by Ooi (2005), who mentions the challenges facing attraction operators and destinations in trying to package experiences, since they were such subjective things, and the same elements of a product can be experienced by different people in different ways. Experiences are socio-cultural, multifaceted and existential, and the packaging of experiences has in the past been weak in terms of its use as a marketing tool. Ritchie *et al* (2011) in their analysis of academic journals on the topic, identified an increase in the study of articles on tourism experiences between 2000 and 2009, yet perhaps unexpectedly, in reality this only mirrored an increase in the total number of articles published and not any significant increase in the study of tourism experience as a percentage of the whole body of work27. Most of the articles (44%) concentrate on typology of experiences rather than other aspects such as methodology or conceptualisation. They conclude that there is much potential for further research on areas of the tourist experience, with one example being that of unexpected experiences. Citing the work of Abrahams (1986), they suggest that there could be positive benefits resulting from incorporating an unexpected element into the tourist experience or product. The point being that by lowering expectations through not describing everything that is on offer, and providing something extra or in addition to what was expected, the operator would be exceeding expectations of visitors, and providing added value, and that this can be achieved

27 An area of study that has emerged since then is that of co-creation of experience, and this is described further in section 2.15.2

through careful planning. Furthermore, the use of labels to influence the experience, and how this relates to appraisal theory is based on the notion that experiences are basically subjective:

> "*they can be shaped by three things – what occurred, the meaning that the service provider applies to what occurred, and the interpretation that the consumer gives to what occurred, both during and after the experience*" (Ritchie *et al*, 2011 p 424).

The authors elaborated, stating that the focus of many organisations was on the 'facts of the experience' rather than on the way that tourists try to understand and relate to their experiences and interpretation of the facts. There may be associated consequences for tourism (attraction) operators in the way that they brand, sign and promote their experiences.

2.16.1 The 'experiencescape'

When discussing the promotion and development of experiences, Mossberg (2007) refers to the work of O'Dell (2005) and suggests that in talking of destination experiences, Bitner's (1992) 'servicescape' should be replaced by the idea of an 'experiencescape'. The 'servicescape' is an environment controlled by the provider, whilst the tourism 'experiencescape' differs in that it can include a variety of products and offerings from more than one supplier. Additionally, it is conceived to involve a series of different 'scapes' linked more to the human body's senses, in contrast to established tourism literature focus on the 'gaze' and visual aspects of sightseeing (Table 2.13).

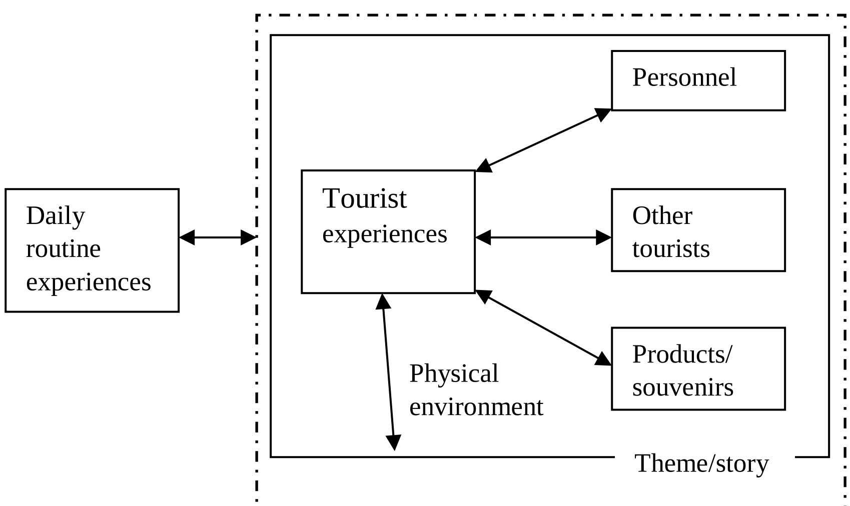
Table 2.13 The various 'sensescapes' of the tourism 'experiencescape'

Soundscapes, smellscapes	Urry 2002; Dann and Jacobsen 2002
Tastescapes	Hjalager and Richards 2002
Touchscape (geography of touch), landscapes	Mossberg 2007
Imagescape	Wanhill 2008
'experiencescape'	O'Dell 2005

(Source: Based on Mossberg 2007).

O'Dell (2005) compared the spaces within which marketing experiences were created and consumed, and which can be seen as similar to physical landscapes that have been created and managed: "*they are, in this sense, landscapes of experience – 'experiencescapes' – that are not only organised by producers (from place marketers and city planners to local private enterprises), but are also actively sought after by consumers*" (O'Dell, 2005 p 16). Whilst the ‘imagescape’ of Wanhill (2008) remains relevant in this context, it refers more to the core experience that visitors can get at an attraction, and in many ways reflects Mossberg’s (2007) view of the ‘experiencescape’, as shown by the ‘tourist experiences’ in Figure 2.16. It is all the elements of the ‘experiencescape’ that influence visitors, and perhaps the major difference here is the mention of the importance of taking a marketing perspective, and the involvement of the tourism and creative industries in a determined effort to co-produce something specific (Quan and Wang, 2004). The Guinness Storehouse example mentioned above is used by Frochot and Batat (2013) as a brief case study demonstrating ‘experiencescape’ as a development of the servicescape concept in attractions. They also describe the concept of ‘flow’, from the area of psychology (Csikszentmihalyi, 1991), and the idea of total immersion in an experience as being relevant to the examination and understanding of the depth of visitor experience in different situations. The ‘peak’ experience is one which was most different from the tourist’s ordinary daily experience (Mossberg, 2007). Yet whilst Quan and Wang (2004) see this as something conceptually different from a ‘supporting’ or service related experience, the two can, in fact be seen as part of a structured whole, as shown in Figure 2.16.

Figure 2.16 Proposed factors influencing the consumer experience within the context of tourism



(Source: Mossberg 2007 p 65).

Whether it is a large geographical destination, with a combination of providers or a specific attraction, the visitor experiences a range of different factors based on environmental, physical, service and sensory elements. In this way, atmospherics and other elements such as theming are an important part of experiential marketing (Pine and Gilmore, 2002). The ‘experiencescape’ is thus an essential part of making visitors feel that they are seeing and experiencing something different from normal and can be based on a product that is real or authentic, as in experiencing a different culture on an international trip; or could be created, for example Disney’s theme parks. When referring to ‘created’ experiences, the concept of authenticity mentioned previously has received much attention for cultural aspects of tourism (Chhabra, 2012; Mkono, 2012), but also in the area of heritage tourism (Yeoman *et al*, 2007). Frochot and Batat (2013) described how authenticity was perceived in different ways depending on the perspectives of particular scholars and present the concept in four main themes: the original, genuine, natural thing; that which is fake or staged; that which is part of branding or a social construction and lies in the eye of the beholder; and finally, linked to legitimacy, virtue and ethics. The importance of these concepts is apparent in that tourists are repeatedly argued to be increasingly seeking authentic and unique experiences (McIntosh, 2004; Yeoman *et al*, 2007; Quadri-Felitti and Fiore, 2013). However, tourists are also acknowledged to be making decisions based on their own interpretation and acceptance of authenticity and how it relates to the ‘experiencescape’.

In his review of the work of O’Dell and Billing (2005), Hall (2005) maintains that in many respects this is an area of study that had, perhaps, been repackaged from previous work on tourism as well as consumer experiences. Chui *et al* (2010) emphasise the ‘servicescape’ aspects of the ‘experiencescape’ and identify four factors in relation to this (Table 2.14).

Table 2.14: Categories of tourist experience Taman Negara.

Factor	Tourist Experiences Categories	Number of Items	‘experiencescape’ Theme
1	Hedonistic Self-Expression	4	Personality-centric
2	Touristic Activities	5	Activity-centric
3	Landscape Tour	3	Site-centric
4	Nature Adventure	3	Environment-centric

(Source: Chui *et al* (2010) p 30

A repertoire of ‘experiencescapes’ is described by Blichfeldt (2007), who refers to the concept of family life cycle and the way that people may have sought out different experiences as they grow older. Ritchie and Hudson (2009) provide a review of literature on the topic of what constitutes a 'tourism experience'. They formulated six broad areas or 'streams' in order to help highlight the potential for future research activity on tourist experience – this is explained in Section 2.14.2. Looking at the origins of work to investigate experience within a tourism context, they refer to the psychological factors of experience of Csikszentmihalyi (1975), as well as the influence of holidays and leisure on experiences (Ryan 1997). A phenomenological typology of tourist experiences is proposed by Cohen (1979), composed of four elements: recreation; diversion; experience; existential. Further work in this field includes that done by Aho (2001) who proposed a process model of the tourism experience, and also describes four main elements: emotional; learning; practical and transformational. Uriely (2005) provides a reminder of the links between examining the tourist experience and the theories of postmodernism, and the de-differentiation of the product, whilst Cohen (1979) refers to the fact that different people may seek different experiences, which has strong connections with the segmentation models of conventional marketing theory (alluded to earlier in this chapter). Sharpley and Stone (2011) continue the theme of investigating the tourist experience and developed the element of time. They questioned the extent to which many tourists on a short break or holiday can truly immerse themselves in a different culture or new, meaningful experience:

> "*far from escaping a consumerist routine, tourists are simply purchasing the opportunity to continue that routine elsewhere … unlikely to benefit from reflective, developmental or meaningful experiences that are often claimed to be the purpose or outcomes of participating in tourism*" (Sharpley and Stone, 2011, p 4).

This is linked to the contribution of Ramsey (2005) who questions the belief that short annual holidays alone would ever be able to provide people with a truly authentic experience of another culture.

The fact that each person is involved in their own tourist experience network is described by Binkhorst (2009), and that this could also be part of a wider 'tourismscape'. The concept of co-creation of the experience is also mentioned by Binkhorst as a direction that could be explored by some destination and attraction managers. It has links to areas of marketing such as relationship building and loyalty. The idea that an experience can be co-created by the supplier and visitor perhaps reflects a more managerial approach (Scott *et al* 2009), although the co-creation of experience in an online context has been the subject of increasing study (Sigala *et al*, 2012; Campos *et al*, 2015) and will be described in more detail in the next section. Selstad (2007) puts the experience in an anthropological context, describing the interactive role of the tourist with operators and host communities. The impact of this change of emphasis on tourism and visitor experience can be illustrated by an example of the way it has influenced museums and art galleries: "*in the past galleries assumed you knew about the art and had just come to see it. In the new gallery the main exhibit is the information you are given – a reframing from art temple to art class*" (Grant, 2000 p 130). This change is also shown by the way that museum attractions present their collections: "*interpretation has likewise changed from emphasizing what might from its affinity to the objective of school visits be termed 'fieldwork' to a more informal journey for experiences*" (Prentice and Anderssen, 2007, p 94). Yet the experience still has to be defined (Williams, 2006), and the difficulty, as noted above, is that the experience sought can be different for different visitors and the experience itself is largely subjective: "*perhaps we imply creation of individual meaning rather than creation of individual experiences"* (Scott *et al*, 2009 p 105). Therefore, the links with experiential marketing models remain strong and ultimately the exact meaning depends on the way that the words are being used, the person using them and the context. This impact by the individual on the attraction experience in co-creating something new (Mossberg, 2007) is examined in more detail in the next section.

2.16.2 Co-creation of experience

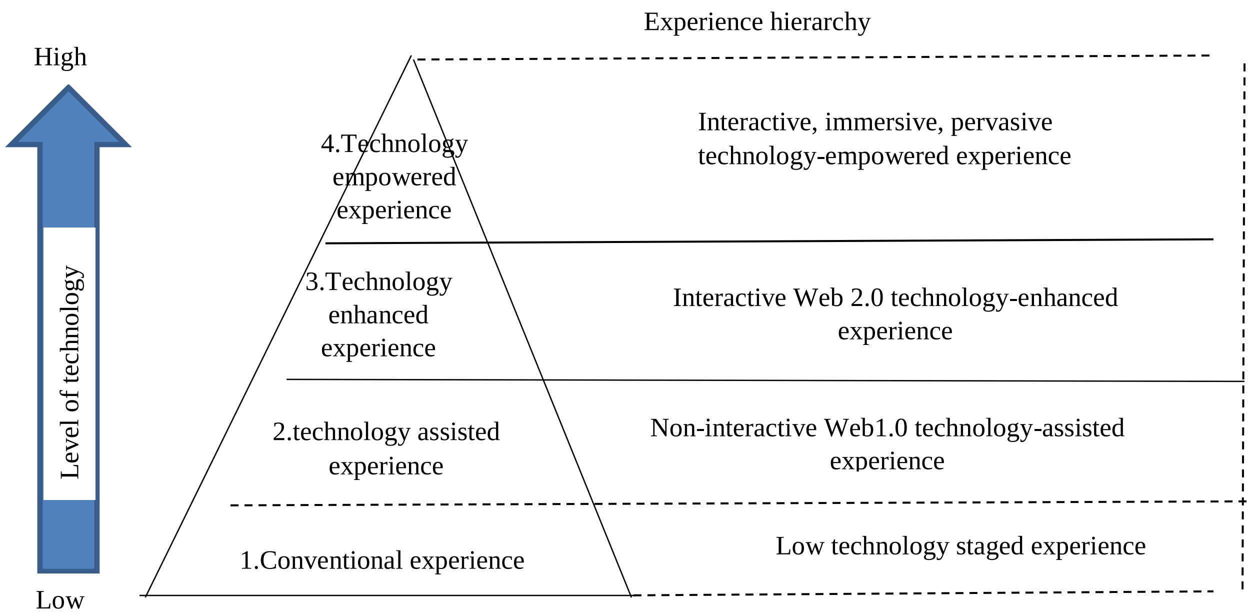
Connections between positive visitor experience and elements of experiential marketing at an attraction are studied by Tsaur *et al* (2007), who shows that an effect on emotion can impact on behavioural intention, particularly through satisfaction levels of visitors. This is achieved through the use of services and physical elements of the attraction visit as the props and stage of Pine and Gilmore's (1999) description of customer value in experiential tourism. The involvement of tourists in the co-creation process, especially for positive outcomes is also key in generating experiences that are memorable (Kim, 2014; Buhalis and Foerste, 2015; Campos, 2016). Andrades and Dimanche (2014) describe the various elements necessary for this to happen: (i) effective management of the physical resources and business; (ii) coordinating the various elements of the tourist experience to design the environment where the experience will be delivered; (iii) develop an environment that enables and encourages the co-creation of tourists with the service providers.

The importance of satisfaction in tourism and its link to the quality of customer experience in creating value is reiterated by Mathis *et al* (2016), whilst the co-creation of value in the service elements of the tourism experience described by Gronroos (2011) leads to the need for the construction of new network models to illustrate these links. The Tourism Experience Network (TEN) consequently proposed by Sfandla and Bjork (2013) is one such model that builds on their notion of an experience supply chain (ESC) and shows how an understanding of the way in which value is created for, and by visitors is part of the process for management of the service provided by tourism managers. Accordingly, "*tourists are contributors in the system in which the production and consumption of experiences occur*" (Sfandla and Bjork, 2013 pp 502), and they actively engage in the process of co-creation of the experience.

The importance of information technology communications (ITC) and its use by tourists is also introduced in this context of co-creation, which was initially described by Neuhofer *et al* (2013) as a four-stage tourism experience value matrix, and then further developed by Neuhofer *et al* (2014) in their more detailed examination of technology-enhanced tourism experiences as described below. There has been an increasing diversity in the way that experiences can be enhanced through the use of technologies such as: interactive websites; online booking systems; interactive ordering systems; mobile platforms including smartphones, tablets and iPads; and the various social media channels such as Twitter and Facebook. The use of user-generated content (UGC) sites such as TripAdvisor are an important source of feedback on individual and group experiences.

The development of an experience typology hierarchy (Neuhofer *et al* 2014) is based on a study of how the different levels of technology can contribute to the co-creation of experiences, and in particular the enhancement of experiences, and adds to the previous work on technology-enhanced tourism experiences of Neuhofer and Buhalis (2012). This typology can be used by tourism providers as a tool to investigate their existing and planned experiences, and as a framework for identifying and analysing the elements that they may need to improve on and develop, with the goal of providing an enhanced experience and better value for visitors. The conceived relationship between level of technology and experience is presented as hierarchical (Figure 2.17).

Figure 2.17. Experience hierarchy

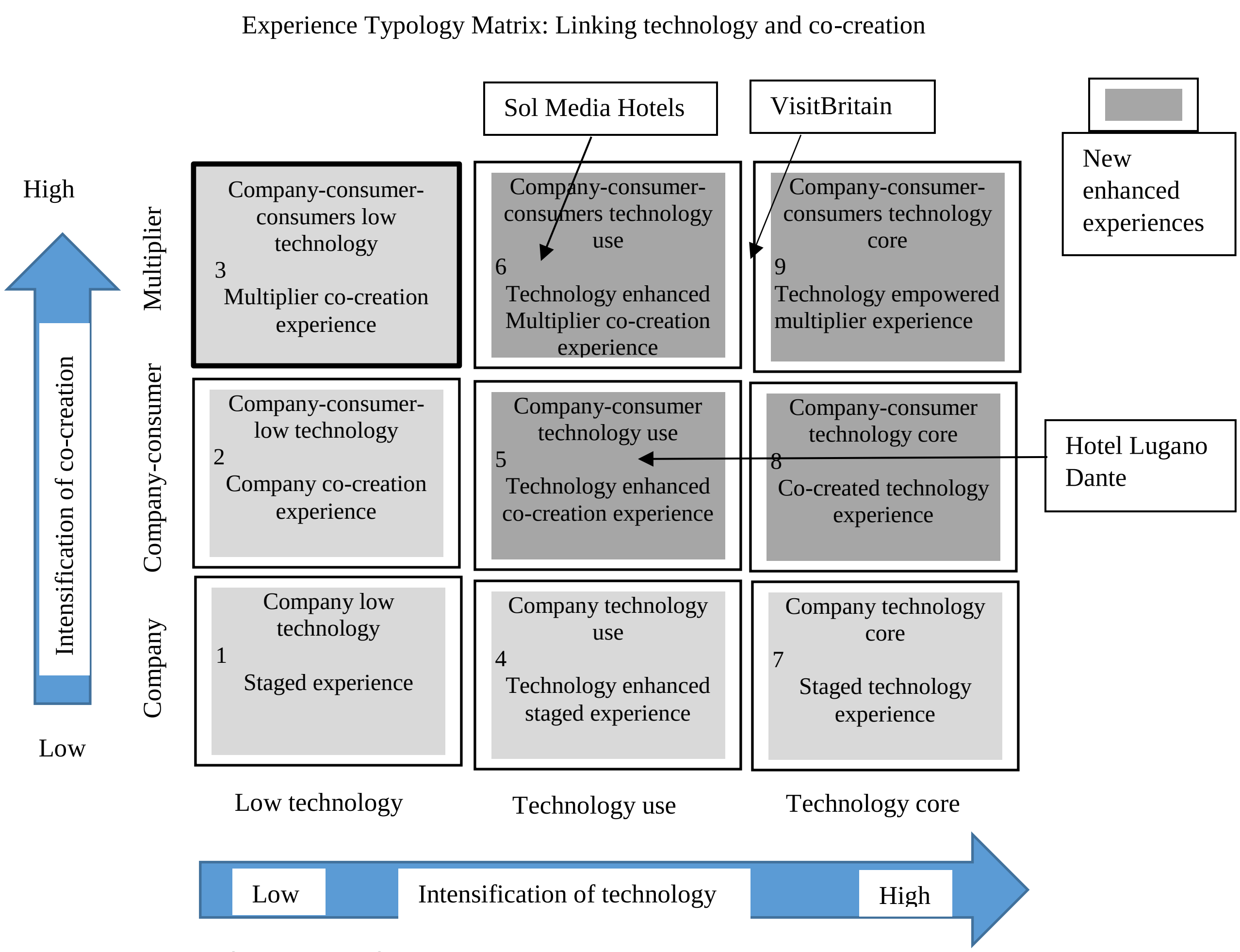


(Source: Neuhofer *et al* 2014 pp348)

In this hierarchy, the first level involves a mostly one-way creation and usually occurs at the experience consumption point. This was found to be the predominant type of experience in the tourism industry according to Binkhorst and Den Dekker (2009). In the next level of technological involvement, the technology used is mainly to facilitate and assist the experience, for example through the use of online booking systems. Websites tend to be non-interactive, and whilst the process is supportive, it does not generally allow for co-creation of the experience to any great extent. The next stage, the technology–enhanced experience, uses technology from Web 2.0 such as social media channels for tourists to be able to take part in discussions, interact with organisations and help create their experience. Web 2.0 is a term used to cover the way that online interaction has developed a new kind of consumer that is more involved in the process by helping to create and add value to online content (Garcia-Barriocanal *et al*, 2010).

The highest level in the experience hierarchy, the technology-empowered experience, describes a situation where technology is an essential part of the overall experience creation. In order to provide the most value for tourists and develop their own competitiveness, Neuhofer *et al* (2014) see organisations improving by striving to progress through to the next stage of the hierarchy. However, they also note that the outcomes of their studies showed that whilst technology was an important element in the tourist experience, there were differences in the level of co-creation, and there was not one predominant technology enhanced tourism experience. Based on recognition of a mix of elements a nine-field typology matrix was proposed, as shown in Figure 2.18.

Figure 2.18 Experience typology matrix: linking technology to co-creation



(Source: adapted from Neuhofer *et al* 2014, pp 346)

Experiences 1-4 and 7 involve basic levels of co-creation and technology, and represent a supplier-led experience delivery, whilst the darker shaded sections demonstrate increasing uses of technology and tourist involvement in the experience co-creation. The example used to illustrate the technology enhanced co-creation experience (5) is that of Hotel Lugano Dante, which developed a mobile platform that allowed guests and hotel staff to:

> "*co-create through exchanging information in real time, which were used to facilitate encounters on multiple touch points. This led to more personalised interactions, more valuable service encounters and an overall enhanced experience for the visitors*" (Neuhofer *et al*, 2014 pp 345).

Guests supplied personal choices ranging from favourite meals and drinks to desired room temperature, whilst the hotel staff were able to interact with guests before arrival, during the stay and after departure. Value and perceived higher quality were created both for the hotel (as supplier) and guest (as customer). "*This can also be seen as a good example of planning service design in tourism to create experiences for a new generation of technology-savvy customers*" (Andrades and Dimanche, 2014, pp 107). Yet whilst the above example is based on an accommodation provider, the use of mobile technology and social media have also been introduced in museums in order to support understanding and the meaning of artefacts. Christonos *et al* (2012), for example, describe a study focusing on the Museum of London involving 13-14 year old pupils who were encouraged to post comments about on-site activities on Twitter (http://twitter.com). The study concluded that the use of such technologies could "*foster the social interactions around museum artefacts and ultimately the process of shared construction of meaning making*" (Charitonos *et al* 2012, pp 802). The use of social media can therefore help with communicating and expressing shared experiences at a more complex level than simple satisfaction/dissatisfaction with particular elements of the visitor experience.

2.16.3 Measuring the experience

Kim *et al* (2012) highlight a link between a memorable experience and income generation as mentioned by Pine and Gilmore (1999). Yet they also state that little had so far been done to investigate or understand the memorable experience or to try and measure it. They conclude that destination managers who implement surveys that contain the factors that help measure the MTE, can collect data that will help them asses their own operations, as well as a possible benchmark against other parts of the destination offering. With this improved understanding of their own target market, the operators can also plan any developments that they may need to make to their particular tourist product, to improve the experience and hence their own competitive advantage. Their review of the components of what they termed the MTE (memorable tourist experience) and relevant literature is shown in Table 2.15.

Table 2.15: Components of the Tourist Experience

Factors	Relevant Literature
Involvement	Bloch and Richins 1983; Blodgett and Granbois 1992; Celsi and Olson 1988; Park and Hastak 1994; Sanbomatsu and Fazio 1990; Swinyard 1993
Hedonism	Dunman and Mattila 2005; Lee, Dattilo, and Howard 1994; Mannell and Kleiber 1997; Otto and Ritchie 1996
Happiness	Bolla, Dawson, and Harrington 1991
Pleasure	Farber and Hall 2007; Floyd 1997; Gunter 1987
Relaxation	Howard *et al*. 1993; Mannell, Zuzanek, and Larson 1988
Stimulation	Arnould and Price 1993; Bolla, Dawson, and Harrington 1991; Howard *et al*. 1993; Obenour *et al*. 2006; Samdahl 1991
Refreshment	Howard *et al*. 1993; Hull and Michael 1995; Samdahl 1991
Social interaction	Ap and Wong 2001; Arnould and Price 1993; Bolla, Dawson, and Harrington 1991; Howard *et al*. 1993; Obenour *et al*. 2006; Samdahl 1991
Spontaneity	Gunter 1987
Meaningfulness	Bruner 1991; Jamal and Hollinshead 2001; Noy 2004; Wilson and Harris 2006
Knowledge	Blackshaw 2003; Otto and Ritchie 1996
Challenge	Lee, Dattilo, and Howard 1994; Mannell and Iso-Ahola 1987
Sense of separation	Gunter 1987
Timelessness	Blackshaw 2003; Gunter 1987
Adventure	Gunter 1987
Personal relevance	Bloch and Richins 1983; Blodgett and Granbois 1992; Celsi and Olson 1988; Park and Hastak 1994; Sanbomatsu and Fazio 1990; Swinyard 1993
Novelty	Dunman and Mattila 2005; Farber and Hall 2007
Escaping pressure	Hull and Michael 1995; Lee, Dattilo, and Howard 1994
Intellectual cultivation	Blackshaw 2003

(Source: Kim *et al*, 2012 p 14)

One of the acknowledged limitations to the work of Kim *et al* (2012) is that they did not collect or identify any negative MTE's, which they accepted as a possible weakness of their study. The seven-dimensional components they chose (hedonism, novelty, local culture, refreshment, meaningfulness, involvement, knowledge) were linked to the travel and tourism experiences of university students from one state in America, and other components could be identified for other tourism sectors or products. Breaking down the experience into different components has been done in other work, as described by Ritchie and Hudson (2009) who provide an overview of research in the various fields of the tourist experience. One section of their work deals with the management and delivery of the various elements of the experience and the parts requiring further research:

> "*Challenge 5 - to identify the most severe managerial problems related to the delivery of an extraordinary experience; to document the nature of these severities; and, to undertake research to provide managers with recommendations as to how these high-priority problems can best be addressed*" (Ritchie and Hudson, 2009, p 123).

The need to identify and highlight delivery problems in the visitor experience for the attention of management returns again to the link between satisfaction and experience. Traditional methods of trying to identify visitor satisfaction or dissatisfaction have included surveys and the use of visitor comments books, and whilst these still remain an important potential source of information, the use of social media by attractions has until recently been largely ignored (Volo, 2009; Charitonos *et al*, 2012; Leask *et al*, 2013; Theocharidis *et al*; 2014). This is a topic investigated in more detail later in this chapter.

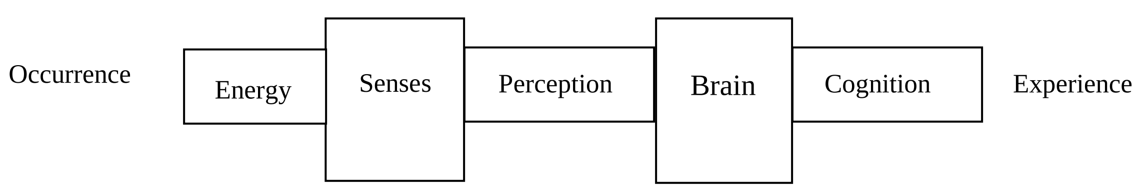
In order to investigate and measure satisfaction levels of visitor experience, Guthrie and Anderson (2010) point out a possible imbalance between the needs of the researcher or destination manager and those of the visitor. They proposed additional narrative surveys alongside traditional visitor surveys to get a better understanding of satisfaction and the visitor experience: "*narratives can encapsulate key points and how elements combine in a destination experience*" (Guthrie and Anderson, 2010 p 111). Crucially, they also mention the way that visitors create their own narratives, and how this can lead to word-of-mouth recommendations about a destination. Vitterso *et al* (2000) discuss cognitive theory (cognition and effect) in relation to measuring satisfaction levels of visitors to six attractions in Norway. The noteworthy fact here is a discernable difference between visitors from different cultures, and the experiences they sought or had. The relevance and importance of visitor narrative should not be underestimated, since it is the way that people formulate and express their experiences: "*the primary form through which people communicate and comprehend experience*" (Padgett and Allen, 1997, p 56). Thus, the visitor story is a result of the individual visitor's process of contextualizing and formulating their own experience and then telling this to others. With respect to this, the issue of perception and image-processing may be seen to hold relevance:

> "*The image of place is not an absolute but rather the outcome of a process whereby the visitor's motivations, anticipations and predispositions combine to colour their interactions with, and evaluation of, the people and places they encounter in the destination*" (Guthrie and Anderson 2010, p 124).

Guthrie and Anderson's (2010) model may have a place in helping attraction operators to better understand the visitor experience, but the narrative is also formulated from a wider process that includes previous experiences and viewing things through their own lens (Urry, 2011).

Models for measuring or analyzing the experience have been proposed - Mueller and Scheurer's (2004) experience setting model was tested by Pikkemaat *et al* (2009) who found it a useful link between supply and demand elements, but complex and time consuming to implement. Volo's (2009) review of tourism experience literature identified two broad themes (i) social science focus on motivations, meanings and authenticity; and (ii) consumer behaviour emphasis that includes typologies and issues such as quality and satisfaction. In this approach to measuring experience, Volo analysed 36 online blogs written by tourists and conceptualised experience as a sequence of perceived events (Figure 2.19).

Figure 2.19. The Experience Sequence



(Source: Volo 2009 p 119)

In line with this, the tourist experience can be made up of different elements that a tourist encounters on holiday and can be viewed in two ways – the essence and offering of the experience (Volo, 2009). Furthermore, marketers have a role to play in both parts of the experience, and the focus of tourism marketing should be:

> "*(a) to create, offer and communicate 'anticipated experiences' that individuals would classify as among those they would seek; (b) help the tourists to 'categorize experiences offerings' in easy market-defined ways; and (c) to suggest ways to 'reinterpret the tourist's experiences' by post-intervention of the tourist mind*" (Volo, 2009 p 120/1).

Within the tourism experience, Chhabra (2012) claims that authenticity remains an important feature of any visit, particularly with regards to heritage issues and Mkono (2012) confirms that a review of online comments shows that the issue of authenticity is still of relevance to some tourists at least. "*The onus on attractions is thus to retain a core sense of authenticity and to offer a range of different levels of experience for different customer segments and age groups, with Gen Y in particular wishing to 'listen less and do more' in their visit experiences*" (Leask *et al*, 2014 pp 468).

Leask *et al* (2014) went on to say that the overwhelming use of digital media by the increasingly important demographic group Generation Y[28] should not be ignored by tourism operators. This group may want to be more involved with the attraction experience and will often use digital technology to do this (Chen and Chen, 2010). Technology can therefore be used in a complementary way to enhance visitor experience (Neuhofer *et al* 2014), so that whilst it is not an essential element, it can still be an important part of the tourist experience. In this respect, the choice can still lie with the visitor and how much they want to use technology as part of their experience. Kotler *et al* (2010a, p33) state that "*companies that want to embrace this new trend should accommodate this need and help customers connect to one another in communities".* Gustavo (2013) noted that attraction websites, Facebook and TripAdvisor profiles provided the opportunity for communications sharing between customers in an online community. This now leads to an examination of user generated content in more detail, its relevance to the visitor experience, and perhaps as a potential visitor experience measurement tool.

2.16.4 eWOM and social media

The impact of digital communication technologies and especially Web 2.0 on tourism planning and consumption has been dramatic (Fotis *et al*, 2011; Leung *et al*, 2013; Sigala, 2016). The way

[28] This is the demographic cohort born roughly between the 1980s and 2000, the first ones to have almost constant access to personal computers, mobile phones, the internet and video games

people plan their holiday travel, through the use of online review sites and other sources of information such as search engines, has changed completely from the previous dependence on printed material (Buhalis and Law, 2008; Munar and Jacobsen, 2013; Morrison, 2013; Yoo and Gretzel, 2016). As a focus for tourism research, the Internet is important in several ways (Table 2.16).

Table 2.16 The Internet as a focus for tourism research

Topic/theme	**Author**
e-commerce	O'Connor (2003); Webber (1999)
Destination image formation	Frias, Rodriguez, and Castaneda (2008)
Intermediation and distribution	Buhalis and Licata (2002); Buhalis and Law (2008); Mills and Law (2004)
Tourist behaviour	Luo, Feng & Cai (2004); Mattila and Mount (2003)
Tourist created content	Munar (2010)
Tourists weblogs	Pudliner (2007)
Impact of social media on search engine results	Xiang and Gretzel (2010)
Online shared videos and audiovisual tourism content	Tussyadiah and Fesenmaier (2009)
Social media and virtual experiences in destination branding	Hyun and Cai (2009); Munar (2009); Munar (2011)

(Source: Adapted from Munar and Ooi (2012, p 2)

Electronic word of mouth (eWOM[29]) in particular, has been able to "*positively influence the destination image, tourist attitude and travel intention*" (Jalilvand *et al*, 2012 p 134), whilst museums' websites, for example have been replaced "*and the Web as a two-way multi-sensory communications environment takes their place*" (Bearman and Trant, 2007 p 10). Online search engines have become the major source of information for holiday planning (Xiang and Gretzel, 2010; Sotiriadis and van Zyl, 2016) and the results of searches can deliver not only content supplied by tourism organisations and operators, but a plethora of user generated content using a variety of different media including social media. "*Tourism marketers can no longer ignore the role of social media in distributing travel-related information without risking to become irrelevant*" (Xiang and Gretzel, 2010 pp 186). In this new era of digital social media interaction, a viable strategy for tourism operators, rather than trying to continually ensure that their own

[29] eWOM is the personal influence of consumers on others through recommendations in an online context (Markey *et al*, 2009)

website is featured highly in any relevant searches, should instead concentrate on fully embracing the possibilities and opportunities offered by social media (Lieb, 2011; Law *et al*, 2014; Yoo and Gretzel, 2016).

Yet there has still been concern about the credibility of some online UGC in tourism (Fotis *et al*, 2012; Munar and Jacobsen, 2013; Sigala, 2016), mainly due to the subjective nature of much content and the apparent ease with which hotels and other tourism operators could post seemingly independent reviews that may have given positive feedback about themselves and negative comments on competitors (Chung and Buhalis, 2008). These issues relating to source credibility and trustworthiness of travel planning UGC sites are linked to interpersonal influences through eWOM (Litvin *et al*, 2008; Munar and Ooi, 2012). There is also a strong link between attitude and behavioral intention, and the notion of 'perceptual homophily' in which "*people often regard others who are similar to them as credible sources*" (Ayeh *et al*, 2013 p 440). The implication for managers of UGC sites or attractions seeking to develop their online social media presence is that they should seek to develop the sense of similarity between contributors and those planning their travels. This has strong parallels with market segmentation theories, where the specific target market was identified and then all product and marketing communications were adapted and made relevant to that particular group leading to a more efficient strategic direction (Kotler *et al*, 2010).

The efforts of managers of UGC sites to try and 'police' their sites to prevent fraudulent use can be as straightforward as the monitoring of online discussions and postings, but for larger forums this can often be impossible in practical terms. Ayeh *et al* (2013) state that whilst some automated tools such as Social Mention (www.socialmention.com) can help with this task, perhaps the most important thing to do is to respond to any negative comments about a product or service as quickly as possible and try and resolve any issues. In doing so they will perhaps help to instill confidence in the hotel, attraction or other travel product, particularly if they can refer to more recent postings that confirm that they have tackled the problem (Jalilvand *et al*, 2012; Ayeh *et al*, 2013). Empirical analysis of UGC has started to increase but is still predominantly focused on guests reviews of hotels and accommodation (Garcia-Barriocanal *et al*, 2010), although some work has been done on the attractions sector such as a study of Greek museums and social media (Theocharidis *et al*, 2014). The work of Garcia-Barriocanal *et al* (2010) provide some interesting directions for future analysis of visitor feedback, in that whilst previous studies of gaps in the service–quality delivery based on the SERVQUAL model (Parasuraman *et al*, 1998) were reliant on questionnaire type responses, there is now the possibility of using information extracted automatically from UGC travel sites to retrieve feedback from customers for analysis: "*shallow natural language processing (NLP) techniques can be used to detect sentences in online hotel reviews and tag them to a level that allows identifying simple opinions that provide some useful feedback for management*" (Garcia-Barriocanal *et al*, 2010 p 9). They also state that the use of rating systems for UGC can be particularly important in assisting the development of credibility and trustworthiness of comments as well as improving website quality, user experience and satisfaction (Filieri *et al*, 2015).

In the case of many UGC sites, the credibility of individual postings can be linked to the profile of the reviewer, and this is true for users of TripAdvisor, according to Amaral *et al* (2014) who state that if a reviewer is seen by their online peers as trustworthy and credible, perhaps through their experience of providing other reviews, then this can have a major influence on the propensity of others to undertake similar travel or purchases (Sigala *et al*, 2012). There is no requirement for people to 'join' TripAdvisor as they must do with Facebook, reviews are open to view by anyone, but in order to post a review, a user profile must be created. There are also benefits for the supplier, in that increased interaction and co-creation with the consumer means that the relationship between the two is strengthened. One example cited by Amaral *et al* (2014) is that of restaurants, where TripAdvisor reviewers with higher involvement and engagement can be targeted by the businesses for greater interaction since they can play an important part in the online promotion of the restaurants. Thus, it has been recognised by the supply-side of the hospitality sector that UGC expressed through reviews can reduce the uncertainty and risk in the decision-making process for potential consumers. Similarly, it may be argued, UGC holds potential as a promotional tool for attractions trying to develop and retain visitor numbers as part of the management of experience. Despite the concerns outlined above, many users view tools such as TripAdvisor, as one social media platform facilitating UGC, as by now well established and a generally trustworthy and useful source of eWOM and opinions, expressed through personal reviews of others. "*This trust stems not only from the personal trust emanating from knowledge exchange within virtual communities, but also from the systems trust inherent in its numerical rankings"* (Jeacle and Carter, 2011 p 306). The ability by individuals to make comment on the postings of other reviewers, together with the response of the hotel or other travel product, can help ensure some degree of credibility of content and also self-discipline of the system (Jeacle and Carter, 2011; Yoo and Gretzel, 2016). Another feature of TripAdvisor is the ranking system of attractions based on its popularity index, which in turn is based on the reviewers' ratings for each attraction. Whilst the systems and symbols themselves remain constant, for example an attraction could only be given a score of 1-5, where 5 is excellent and 1 is terrible, the position of an attraction in the rankings 'league table' can move up or down depending on the average score it is given in comparison to other attractions in the area. It is therefore easy to see which was the number 1 attraction in terms of reviewers' scores in any geographical area. TripAdvisor have developed this further by awarding 'certificates of excellence' and announcing annual awards such as 'Top Ten Family Attractions' which provide a more permanent accolade that can also be used in other marketing material by the attraction. Encouraging reviewers to participate has been aided by developments in 'gamification'[30], but research relating to tourism remains limited (Sigala, 2015; Yoo and Gretzel, 2016).

The issues of benchmarking aforementioned in relation to online UGC, could, for the attractions sector involve the use of national quality assurance systems such as the VAQAS scheme. These systems tend to rely on formal rating systems that assess operational and service features of the visit, including cleanliness. The advantage of such a process is that it is standardised and partly objective (although they still rely on the subjective comments of assessors). Since 2014 the assessment visits for the VAQAS scheme (relevant to the Welsh context of this PhD study), have been scheduled on a bi-annual basis. This contrasts with online assessments via sites such as TripAdvisor where informal visitor feedback is able to be captured less than 24 hours after the visit, thus creating an immediate, dynamic and changing picture of visitor experiences (Buhalis and Foerste, 2015). It also contrasts with traditional visitor comments books held at attractions, encouraging review at the time of visit departure, perhaps pre-reflection of visit experience.

In the context of online reviews, it has been noted that reviewers can provide their own personal comments about any aspect of their visit, but this can also include events totally out of the control of the attraction such as roadworks causing delays or bad weather, that may have a negative

[30] Gamification is the use of game-play mechanics for non-game applications (Deterding *et al*, 2011).

impact on the experience, and could be reflected in the subsequent reviews and also a lower rating (Scott and Orlikowski, 2012). This is further complicated by the fact that reviewers can often lapse into story-telling, recounting other aspects of their visit, repeating points about certain aspects and some do not even contain opinions (Marrese-Taylor *et al*, 2013). The suggestion that as few as 13% of people that have used tourism UGC websites have ever written their own reviews (Gretzel *et al*, 2011) shows that the process can be dominated by a 'silent' majority that could be influenced by the comments of others, whilst not expressing their own, thus making it even more important for operators to respond to negative reviews promptly where necessary.

It is also interesting to note that at the time of completing this PhD thesis in 2017, the TripAdvisor framework for writing reviews is different for hotels and restaurants compared with attractions/things to do. The accommodation pages include a section on hotel style and amenities: did the hotel offer rooms with great views? did the hotel have an indoor pool? was it a budget hotel? was it a luxury hotel? was it a romantic hotel? was it a trendy hotel? There is also a section on hotel ratings (1-5) for: service; value; and rooms (the last one presumably referring to satisfaction with the rooms). A section on the theme of 'service and value' is also included for 'restaurants/places to eat', but there is nothing similar for attractions.

The TripAdvisor template for attractions asks for recommended length of visit? was the attraction free? would it be a good rainy-day activity? was there food available? was a car required to access the attraction? was the attraction accessible using public transport? (www.TripAdviser.co.uk). The omission of questions relating to service and value may be due to the fact that the category is relatively broad in scope and includes reviews of beaches and countryside amongst the built or managed places to visit/things to see and do. One key issue here is that amongst all the comments and ranking scales for attractions/things to do, there is no option provided for reviewers to be able to choose 'not applicable'. It is difficult, for example to include 'service' and 'value' categories for attraction reviews and these elements do not contribute to the attraction ranking system used by TripAdvisor. Furthermore, if the included categories did not relate to the particular attraction being reviewed, there is potential for a rating score to be adversely affected. In this respect, it may be contended that the ratings system for attractions on TripAdvisor is not as comprehensive as that for accommodation, and nor does it facilitate a thorough metrics-based measurement of visitor attraction experience.

2.18 Chapter Conclusion

This chapter was intended to provide an examination of existing research that would build on the personal and professional experiences of the researcher in relation to gaining a deeper insight into visitor attraction operators' understanding of the visitor experience and their practices in relation to managing online communication and feedback (the main research objective of this PhD). In conclusion, three key issues may be identified that helped to shape the researcher's conceptual thinking post-literature review, but prior to operationalising the research objectives (Chapter 4). Firstly, it was noted that previous academic researchers had questioned the extent to which the visitor attractions sector has engaged with modern experiential marketing concepts and how they can create additional value for visitors in the experience economy. This was noted to be reflected in the way that attractions have been grouped together or classified – tending to relate to supply-based physical features such as 'natural' or 'built' rather than the visitor experience, open to co-creation between the operator and the visitor. This relates to research objective 1 and the need to establish a baseline of the Welsh visitor attractions sector. Secondly, a need for further study to provide information and recommendations to management on weaknesses in experience delivery was identified Ritchie and Hudson (2009) and Leask *et al*, (2014), (research objective 2) and this prompted an examination of the elements involved in the experience. Academic consensus was noted with respect to the relevance of quality; satisfaction; and value and these three elements were acknowledged to play a role in the concept of 'experiencescape'. Thirdly, the importance of eWOM and social media-generated UGC and its influence on tourism through experience sharing and reviews of products and places cannot be ignored (Xiang and Gretzel, 2010; Gustavo, 2013; Munar and Jacobsen, 2014; Zeng and Gerritsen, 2014; Kladou and Mavragani, 2015).

The co-creation of experience has been a developing area of study in tourism literature (Leung *et al*, 2013; Buhalis *et al*, 2015; Campos, 2016; Sigla, 2016), and this also has implications for visitor attraction operators seeking to understand and influence visitor experience, particularly in terms of responding to visitor feedback relating to the visitor experience (research objective 3).

The next chapter (Chapter 3) moves on from considering academic research contributions deemed to be of relevance to this PhD study to clarify the context of the research - based on Welsh visitor attractions - and the conceptual thinking of the researcher - influenced by personal and professional experiences that shaped operational understanding of the supply-side of visitor attractions in Wales. Chapter 3 also, fundamentally, attempts to provide baseline knowledge to support sampling rigour in relation to conducting empirical research on Welsh visitor attraction operators.

Chapter 3

Context

3.1 Introduction

The intention of this chapter is to outline the context for the research, the Welsh visitor attraction sector. It does this by drawing on secondary data sources to provide a critical analysis and updated review of the visitor attractions sector in Wales in 2015[31] in line with the first research objective presented in Chapter 1. However, as a prelude to this, it was felt important to briefly explain the position of the author in the process in order to understand the role played in gathering and analysing the data, and the conceptual thinking involved in this work. The influence of researchers on the researched is generally well understood as an issue where:

> "*we don't separate who we are as persons from the research and analysis that we do. Therefore, we must be self-reflective about how we influence the research process and, in turn, how it influences us*" (Corbin and Strauss 2008 p 11).

Researchers and research participants can even be seen to be co-constructing, especially in the process of data collection (Finlay 2002). This becomes even more relevant, perhaps, in elements of the netnographic approach - it becomes important to understand the researcher's own viewpoint or stance, and this introspective review is a useful starting point for further analysis: "*becoming conscious and aware of our own social and psychic position in the research is the very foundation of the netnographic endeavour"* (Kozinets 2015 p 109). At this stage, therefore, I introduce a brief personal commentary relating to my professional involvement with the Welsh visitor attractions sector to ensure that the motivations and processes of the research are more transparent (Chesney 2001). A need to review the Welsh visitor attractions landscape (in line with the first research objective of this study) prior to being able to research the Welsh visitor attractions sector was acknowledged through personal and professional experiences of tourism in Wales.

Prior to entering the Higher Education sector, I had enjoyed a career spanning over 20 years in a variety of posts in tourism and heritage with different organisations. These included Cadw:Welsh

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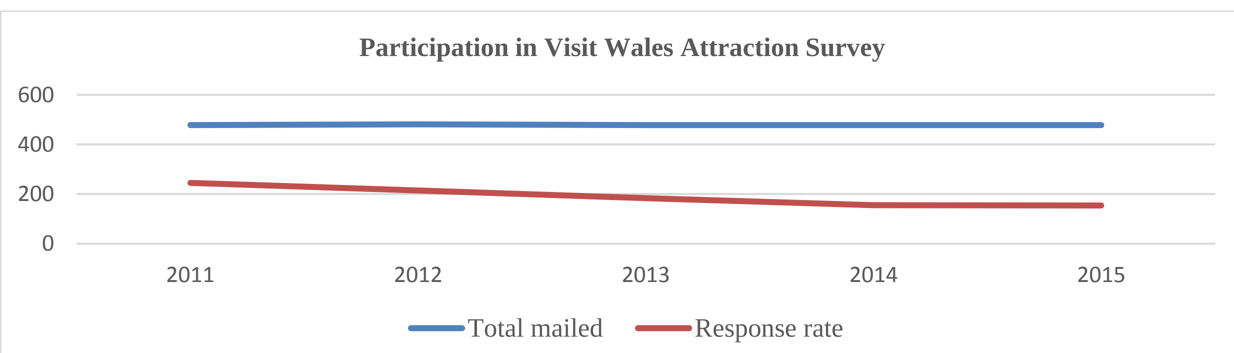
[31] Statistical information and annual reviews of attractions in Wales for 2016 were not available at the time of completing revisions to this thesis in February 2018.

Historic Monuments; the National Trust South Wales Region; and the National Museum Wales. This direct involvement with the attractions sector may be traced back to the early part of my career, and it has almost entirely entailed looking at visitor attractions from an operators' viewpoint, and from within the public, private and third sectors. My view of visitor attractions is naturally influenced by various factors from my previous experience, and although this suggests the risk of researcher, it can also be recognised as a positive factor in that there may be insights that could be facilitated by this 'insider view' (Corbin and Strauss, 2008). Methodological issues relating to positionality and axiology are explored in more detail at the beginning of Chapter 4. However, it must be recognised that my personal and professional experiences were also important and influential in framing the initial topic for this thesis – I had become aware of an issue regarding the annual attractions reports of Visit Wales, in that not all attractions were included in the survey and the response rate of those that were contacted was usually below 50% (see Table 3.1 and Figure 3.1). Despite these shortcomings, the survey results were often used as an official representation of the Welsh visitor attractions sector as a whole.

Table 3.1 Response rates for the Visit Wales Welsh Attractions survey, 2011-2015

Year	**2011**	**2012**	**2013**	**2014**	**2015**
Total attractions mailed	478	481	478	478	478
Attractions completing survey	216 (45%)	190 (40%)	173 (36%)	146 (31%)	149 (31%)
Attractions unable to provide figures	29 (6%)	25 (5%)	10 (2%)	9 (2%)	5 (1%)
Total response rate	245 (51%)	215 (50%)	183 (44%)	155 (32%)	154 (32%)

(Source: Welsh Government, 2015; 2016)



(Source: Welsh Government, 2015; 2016)

Therefore, the latest official data available on visitor attractions in Wales (Welsh Government, 2016) was based on responses from 154 attractions, and of these, only 149 provided all the details requested for analysis. Even if these 149 were the 'major players' as claimed by the researchers in their methodology (Welsh Government, 2015), I questioned whether there remained some doubt about the possibility of trends and other details not identified from the rest of the attractions (those not contacted or the non-respondents)? Previous academic research on the total number and type of visitor attractions in Wales was carried out in 1998 (Stevens 2000a). This chapter therefore sets out to provide a more up-to-date review of the Welsh attractions sector. This was considered important as a means of establishing the foundations for the main part of the primary research, by determining the nature and number of visitor attractions in Wales in 2015, as well as identifying how provision may have changed since 1998. Providing an updated review of the Welsh visitor attraction landscape (research objective 1) was especially important given the focus of the study on the supply-side of Welsh visitor attractions.

3.2 Attraction surveys and reports

The work of Professor Terry Stevens is amongst the most widely cited in relation to historical reviews of the Welsh visitor attractions sector and it has often been cited by Welsh tourism policy-makers. According to Stevens (2000b), the number of visitor attractions in Wales doubled in the decade between 1988 and 1998, but it was also noted that it was not possible at that time to predict if the overall number of attractions would continue to grow, with each one achieving a smaller number of visitors (suggesting 'demand displacement'), or if there would start to be a decline in overall attractions provision. Other factors in the Welsh visitor attractions sector at that time were also highlighted – in particular the potential impact of the introduction of free entry to National Museums in 2000, and the possible growth in the number of attractions due to Millennium Projects and Heritage Lottery funded developments, reflecting U.K. policy initiatives. A key task within this PhD study was recognised to be, by necessity, an examination of the Welsh visitor attractions sector to understand how it might have changed since the 1998 review of Stevens (2000a). This was important as the Welsh visitor attractions sector was chosen to provide the context for the study of the marketing practice and management of online communication and feedback relating to the visitor attraction experience.

3.2.1 Approach

This chapter recounts the researcher's thinking and actions behind a critical analysis of detailed desk research about the numbers of attractions in Wales, drawing on a variety of sources including Visit Wales, local authorities, Regional Tourism Partnerships and organisations such as The National Trust, Cadw and individual attractions themselves. The intention is to provide a comprehensive picture of the attractions sector in Wales in 2015. This takes account of the initial commentary of Stevens (2000a) but also seeks to identify and critically analyse what has happened in the attractions sector in the period 1998-2015. An early setback in this research was that the database of Welsh attractions developed in 1998 was no longer available. However, through an analysis of historical data from Wales Tourist Board mailing lists, the author was able to recreate a 1998 list of attractions that can be used for comparison (Appendix 1). Whilst a database of attractions is maintained by Visit Wales (previously known as the Wales Tourist Board), there is no formal procedure for updating it or ensuring its accuracy, depending in the main on the industry knowledge of staff mostly in the Quality Assurance unit dealing with VAQAS Cymru. Weaknesses in this system have led to errors such as out-of-date entries being created on the www.visitwales.com website for attractions that are no longer open (for example Begelly Gardens) as well as duplication of entries with slightly different names, or data entered by different people at different times.

The Welsh Government's research on trends in the attractions sector in 2015 (Welsh Government, 2016), is based on a sample of 149 attractions who responded to the request for information in early 2016 (comparisons between the results for 2011 to 2015 are shown in Table 3.1 and Figure 3.1). There was no detailed information available as to how the 'mail-able' attractions list was determined, but anecdotal evidence shows that it was apparently based on an internal document that includes the criteria that attractions should be manned (therefore excluding for example, castle ruins with no admissions point) and also that they meet the Visit Wales accepted definition of 'visitor attraction' (see Chapter 1). This would exclude most leisure centres for example (but not the LC2 in Swansea which is included). Any attractions that had previously asked not to be included in the survey were also ignored. As an example of the process involved, in 2015, 191 attractions were sent paper questionnaires, and 232 were provided with a link to an online version. Thus, the survey instrument was distributed via a choice of media, with the online channel being the most popular. A further 56 attractions were encouraged to participate through contact with the National Trust, Local Authorities, National Museum Wales and Cadw (Welsh Government, 2015), reflecting the ownership of properties as attractions by these organisations (Table 3.2). **13**

Table 3.2 - Comparison of annual visitor numbers to Welsh attractions 2012-2014 by organisation of ownership

Organisation	**No. attns**	**Visits 2012**	**Visits 2013**	**Visits 2014**
Cadw	26	1,053,907	1,060,921	1,263,958
National Museum Wales	7	1,739,855	1,648,790	1,670,523
Local Authority	35	3,256,331	2,989,976	3,109642
The National Trust	15	1,000,802	971,389	1,196,666
Private Owner/ Trust	51	4,066,357	3,713,214	5,589,978
Total	**134**	**10,850,897**	**10,650,645**	**13,226,767**

(Source: Welsh Government 2015 p 9)

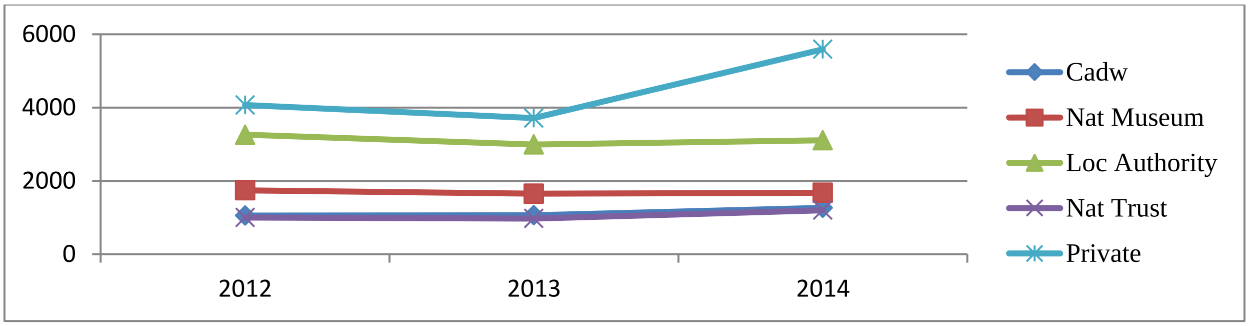


Table 3.2 indicates an overall increase in numbers of visits in 2014, yet it is important to stress that the results may have been significantly influenced by sampling issues (i.e. different ownership group attractions taking part in the survey in different years), thus the data over time should not be treated as directly comparable. Specific attractions that provided information in both 2012 and 2013 to allow for comparisons to be made numbered only 134, and the corresponding figure for comparison between 2013 and 2014 was even lower at 106. It should also be cautioned that the increase in numbers for ‘private owner/trust’ may have been the result of different attractions taking part, with higher visitor numbers. However, it is also worth noting that the 2014 visitor numbers for Cadw, National Museum Wales, Local Authority and National Trust (as shown in Table 3.2) were also higher in 2014 than in 2013. This complexity of using these figures to draw detailed conclusions should be highlighted – they are based on a sample of 30% of those responding to the Welsh attractions survey, which itself is based on a response rate of below 50% of the total number of visitor attractions in Wales. Nevertheless, the Welsh

Government (2015) maintains that these annual visitor attraction surveys are still useful as indicators of trends, especially since they generally tend to include data from the ‘key players’ in the attractions sector, thus offering an industry proxy. Yet as noted above, there may be other trends in the sector that are not identified, and these may be nuances that affect the attraction experience for the visitor.

As noted in Chapter 2, Stevens (2000a, 2000b, 2003) painted a picture of Wales as a country with seemingly too many attractions vis-à-vis absolute levels of visitor demand. The basis of his analysis was that the number of attractions in Wales had doubled in just over 10 years from 305 in 1986 to 610 in 1998. This also followed a dramatic increase from only 186 attractions in the previous decade (1970s) and was during a period when there was a huge growth in heritage related attractions in particular, as noted by Prentice (1994). An important issue for this PhD study (in line with research objective 1) was to determine what constituted the attraction population in 2015 and to gain an insight into how many attractions had survived the possible dramatic increases in supply and competition since 2000. How many visitor attractions were still open in 2015, and had there been any significant changes in types of attractions or ownership? As with other parts of the United Kingdom, it is recognized that the investigation of this topic is complicated by the structure of the tourism industry and the attractions sector, with some large, well known organizations operating multi-sites, but also many small micro-business, owner operators. The fact that there is no compulsory register of visitor attractions in Wales (or the U.K.) makes it difficult for Visit Wales to ensure that its database is accurate and up-to-date.

There are also wider issues relating to the support and development of the attraction product. It may have been true that U.K. Heritage \Lottery and European funding had a dramatic effect on the type and scale of some attraction projects, including the ’Millennium Projects’ at the start of the twenty first century (Swarbrooke 2009), but on a more local level, many of the other changes in opening or closing down of certain attractions appears to be the result of other factors. These can range from differences in local authority policy (such as the support for development of museums and countryside attractions) and lifestyle changes of owner-operators, as much as issues such as funding opportunities or external factors such as those influencing farm diversification for example. Large-scale, flagship developments in Wales, including the National Botanic Garden of Wales and National Waterfront Museum, together with a host of smaller public sector and privately funded new attractions, paint a picture of a relatively buoyant sector. Yet the country has also seen its share of high profile, lottery funded projects either closing, such as the Centre for Visual Arts (Cardiff)[32], or those that lurch from one revenue crisis to another, as with the National Botanic Garden of Wales[33].

3.3 Developing a database of attractions for 2015

The Visit Wales annual analysis of visits to attractions in Wales commenced in 1973 and it has provided an invaluable insight into visitor numbers and general trends in income and expenditure. Yet, worthwhile as the results of each survey are, they suffer from the obvious bias that they can only include the details of those attractions that participate in the survey, as noted earlier in this chapter. Since its inception in 2003, the Visit Wales Quality Team has maintained a database of visitor attractions that take part in the annual surveys and the VAQAS quality assurance scheme. It should be noted that this database for the latter originated from the list used for the annual survey of attractions, yet it must be highlighted that there still remains no official record of the total number of attractions that may be eligible or likely to join VAQAS. This makes calculations of total take-up percentages difficult. Keeping an accurate central record of those attractions opening or closing down, often depends on the industry knowledge of Visit Wales staff or the voluntary submission of information, as with those taking part in the annual surveys. It may be impossible in practical terms to maintain a list of every visitor attraction open to the public in Wales at any given time, especially when the exact definition of what constitutes an attraction can often vary for different people and different situations. Stevens (2003) and Leask (2008) agree on the issues of inconsistencies in definition yet they disagree on their own definitions of attractions, indicating again the complexity involved in visitor attraction measurement and analysis.

A key issue with respect to a focus on Welsh visitor attractions in this PhD study, was therefore how to create a list of attractions that can be compared like-for-like with previous lists. Information supplied by Visit Wales was used to recreate the 1998 database to allow for historical

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[32] This attraction opened in September 1999 and closed less than a year later, having only had 50,000 visitors compared with a target of 250,000

[33] NBGW opened in 2000 and was expected to become self-financing within 5 years, yet has continued to operate at a significant loss each year.

comparisons between then and 2015 (Appendix 1). One immediate complication observed was that the recreated 1998 list of 610 attractions, includes a number of places that on further scrutiny do not fully meet the definition of ‘visitor attraction’ used by Visit Wales in 2016 - leisure centres and retail outlets being the most noticeable. The number of 1998 ‘attractions’ for comparison with 2015 was therefore reduced to 540 (Appendix 1). The Visit Wales database used for mailing attractions for the annual review of attractions in Wales showed a total listing of 662 attractions in 2015, yet an analysis of the Visit Wales website[34] www.visitwales.com (accessed 15/07/15 and 20/08/16) showed over 1,200 attractions. A critical review of this online data showed that as well as repetition of some entries, it included details of places that had closed and some that did not meet the Visit Wales definition of a visitor attraction such as tourist information centres, small churches, beaches, cafes and pubs. By combining the two sources, the Visit Wales mailing list and the online data, a total population of 585 Welsh visitor attractions was identified for 2015 (conforming to the Visit Wales definition of an attraction) as shown in Appendix 1. This is the list that was used to compare Welsh visitor attractions for the period between 1998-2015, in line with research objective 1 of this study. The listing of attractions/things to do in Wales on TripAdvisor was also examined. In line with the academic considerations of this online resource in Chapter 2, the validity of some entries could not be guaranteed on this ‘open source’, but the later, detailed review carried out of the listings as part of the research methods employed in relation to research objective 3 (Appendices 4 to 8) shows that many had been ‘adopted’ i.e. taken over by the attractions as ‘official’ and linked to their websites[35] or contained information supplied directly by the attraction itself. As with the other databases, attractions not meeting the Visit Wales definition were excluded from the identified baseline population (Table 3.3).

[34] The website is free and open to all tourism and tourism-related businesses in Wales, subject to them being members of the relevant quality scheme eg VAQAS for attractions or grading for accommodation. However, beaches, pubs, restaurants and other facilities used by ‘visitors’ can also have free entries.

[35] UGC sites TripAdvisor, Facebook and Google all have the facility for operators to ‘claim’ the relevant entry as their own. Additional information such as opening times and links to websites can then be added.

Table 3.3 Comparison of attraction databases

Database	No. of attractions	No. of attractions meeting the Visit Wales definition
Recreated 1998 Visit Wales	610	540
2015 Visit Wales database	1,204	585
www.TripAdvisor.co.uk 2015 (things to do – Wales)	1,548	553

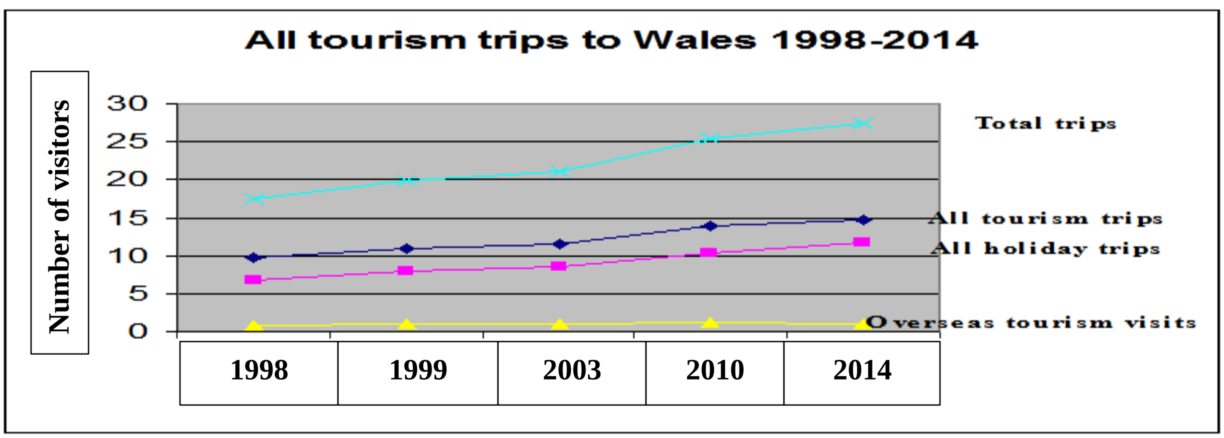
(Source: The author, 2016)

The resultant identified population, based on the Visit Wales attraction definition indicated a rise in Welsh visitor attractions from 540 in 1998 to 585 in 2015 (Appendix 1), representing an increase of 8%. This rise should be acknowledged to be set against a backdrop of increasing competition for visitors' attention (Stevens 2003; Holloway 2009; Garrod and Leask 2012), and also Millennium Projects and Heritage Lottery funding interventions targeting growth of the visitor attractions sector. For comparison, during a similar period, the number of tourism trips to Wales rose by 36.5% from 17.4 million in 1998 to 27.4 million in 2014 as shown in Table 3.4

Table 3.4 All tourism trips to Wales 1998-2014[36]

Year	1998	1999	2003	2010	2014
All tourism trips (millions)	9.8	10.9	11.6	13.9	14.8
All holiday trips (m)	6.8	7.9	8.6	10.3	11.7
Overseas tourism visits (m)	0.79	1.01	0.895	1.26	0.93
Total (m)	17.39	19.9	21.095	25.46	27.43

(Source: WTB 2000; Welsh Government 2005, 2013, 2015)



[36] The figures are from the Wales Visitor Survey, which is based on a research study amongst overseas and UK visitors to Wales undertaken every two years. These were the most recent results available at the time of writing this PhD thesis, although some statistics up to 2015 are included in Appendix 11.

Further information on the number of total staying visitors to Wales (2006-2015), the Welsh market share of the U.K. tourism market (2006-2015), and the Wales share of inbound trips and spend by international visitors to the U.K. over the same period, is included in Appendix 11. These figures are useful in illustrating the wider context of tourism visit trends over the period, and clearly show an overall growth in the number of tourism visits, despite the fact that the Wales share of inbound trips and spend by international visitors to the U.K. had fallen. The number of total visitors to all Welsh visitor attractions over the same period is not known, only the numbers to attractions replying to the Visit Wales attraction surveys (less than 50% of all attractions). Therefore, whilst the number of attractions has risen by 7%, the number of tourism trips to Wales has risen at a much higher rate.

Whilst the overall growth in the number of visitor attractions in Wales in the period under review continued to rise between 1998 and 2015, growth appears to have been at a much slower rate than during the decade 1988-1998, and, there has also been a rise in the total number of visits to Wales (indicating potential market demand for the attractions). The overall market share of attraction visits compared with other tourist and day visitor activities may have remained at a similar level. Further analysis of the data collected for this PhD shows that in all regions of Wales over the period 1998–2015, 88 visitor attractions closed, and 104 new visitor attractions opened. These new attractions ranged from large developments such as the National Waterfront Museum and National Botanic Garden, to smaller, privately-run initiatives such as the West Wales Museum of Childhood, and a host of new tours and attractions in Cardiff and Cardiff Bay. Therefore, whilst the overall number of Welsh visitor attractions has only increased slowly, the actual number of new attractions opening represented approximately 18% of the total, and within the total population there were changes in the type of attractions that had opened and closed, as shown in Appendices 1 and 2.

It is important to point out that Stevens (2000a) presented the 1998 information in several different groupings of attractions, reflecting some of the typologies in use at the time, and since then, there have been some changes in the ways that categories of attractions are presented by the national tourism organizations including Visit Wales. Potteries for example, are included under ‘craft’ rather than ‘work/industrial’; and ‘nature’ includes boat trips rather than these being placed under the category 'transport' as was previously the case. These types of changes have been taken into account and adjustments made to allow correct comparisons of totals.

The results of this analysis suggest that whilst the total number of Welsh visitor attractions open has risen, there have been differences in each region and also in specific categories, with some of the changes being particularly notable. Examining the trends between 1998-2015, the number of 'gardens' open had risen in all areas except Mid Wales. Craft type attractions declined in all areas, especially in South West Wales where they had fallen from 20 to 9 (-45%). In the 'museums and galleries' category, similar numbers of open attractions were apparent over the time period in question in most Welsh regions, except for North Wales where they had risen from 27 to 38 (+29%). In the 'nature' category the overall picture appears to be consistent, with some minor changes only visible. 'Zoo/wildlife' attractions saw a decline in North Wales from 15 to 9 (-60%) The biggest change in 'heritage centres' is seen in South West Wales, with a drop from 9 to 2 (-22%); and in Mid Wales, a decline from 7 to 3 (-43%). 'Farm-type' attractions also saw some significant changes, with a decline observable in most Welsh regions: 7 to 4 (-57%) in North Wales; 5 to 2 (-40%) in South East Wales; 8 to 4 (-50%) in South West Wales. It is worth emphasising again that the above changes only apply to attractions that were considered to meet the Visit Wales definition of attractions as the basis of the researcher's analysis.

3.4 Online marketing: a tourism industry context for Wales

At this point in the discussion of visitor attractions in Wales, it was deemed useful to briefly provide a wider industry context and describe the involvement of the Welsh Government in the area of online communications. Since the late 1990s, Visit Wales and its predecessor, the Wales Tourist Board, has attempted to improve the digital literacy of those working in tourism businesses in Wales (Wales Tourist Board, 2000a; Welsh Government 2013). In the early part of the twenty-first century, tourism businesses in Wales were offered free training sessions to help them develop their entry on a new website www.visitwales.com. Take-up on these sessions was better than expected, with over 50% of tourism businesses estimated to have participated in the scheme between 2000 and 2005 (Welsh Assembly Government, 2006). Yet this still left many tourism businesses that had not taken part, and many of these were the ones that, perhaps, needed to do the most work on their marketing and online activity. This apparent apathy and lack of engagement was previously noted by Blum and Fallon (2001) and would appear to have persisted. Visit Wales relaunched its website in 2013 and continued to encourage tourism businesses to engage in it, but still encountered many that failed to participate or were lack-lustre in their approach to digital activity (Welsh Government, 2015b; 2016). The Tourism Strategy Progress Review (Welsh Government, 2016) highlighted the fact that whilst "*Visit Wales has no remit to directly fund or deliver training for the industry"* (p 21), it would continue to signpost businesses to relevant opportunities that were offered by the Welsh Government. In 2017 this includes the Business Online Support Service (BOSS), which offers free online training modules for employers and employees of any business in Wales. The sessions vary from topics such as an introduction to marketing; knowing your customers/segmentation; and developing a digital marketing strategy, including building a social media profile. The effectiveness of these training opportunities is not yet known, but a comment from the BOSS website is quite interesting: "*many small businesses are finding that the amount of time and energy they are investing in social media is not worth it. They are just not getting the results"* (BOSS, 2017). This appears to suggest that a significant proportion of those businesses that are using social media do not seem to be profiting from it. The Welsh Government remain positive, stating that they intend to "*continue to grow our social media communities, and provide opportunities for destinations in Wales to link directly with our consumers across the globe"* (Welsh Government, 2016 p 13).

3.5 Chapter conclusion

This chapter provided an update on the number of Welsh visitor attractions that met the Visit Wales definition in 2015, compared with the previous study of 1998 (Stevens, 2000a). The focus of the chapter was in line with research objective 1 of this PhD study (see Chapter 1). The resultant identification of a population of Welsh visitor attractions provided the basis for the sampling of Welsh visitor attractions in the primary research phases that are outlined in Chapter 4. Now that a baseline number of attractions has been established, the next chapter describes how the chosen methodology for the research was developed and implemented in line with research objectives 2 and 3 of this PhD.

Chapter Four

Methodology

4.1 Introduction and thesis objectives

This thesis discusses literature and research on the marketing process of visitor attractions, with particular focus on the online co-creation of experience and the management of online comments by visitor attraction operators. It was carried out with the anticipation of providing contributions to empirical and theoretical areas of tourism knowledge. The analysis of co-creation of experience is informed by two approaches (Campos, 2016): firstly, the interaction between consumers and organisations is part of the marketing and management direction (O'Dell, 2005; Mossberg, 2007; Kotler *et al* 2010a); secondly the psychological approach deals with the subjective experiences of individuals (Kim, 2014; Sorensen and Jensen, 2015). As a reminder from Chapter1, the overall objective of the thesis is therefore:

> To develop a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience.

The specific research objectives are to:

1. To provide an updated review of the Welsh visitor attraction landscape;
2. To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool;
3. To explore Welsh visitor attraction operator engagement with online communications and feedback relating to visitor experiences.

This chapter will outline the various stages of the research design and execution in line with operationalising the research objectives. The research objectives of the study are predominantly exploratory and seeking to investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool as well as exploring Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences. These are with a view to being able to answer the research question, 'Is there a link between operator awareness, uptake, and engagement with the management of online communications and feedback and high levels of satisfaction for Welsh visitor attractions recorded via online review sites? The overall aim of the study is to develop a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience.

The value of adopting a mixed methods approach (Cresswell and Clark, 2011) was recognised. Secondary data analysis and three primary data collection phases were designed incorporating quantitative, qualitative and netnographic methods to provide more than one means of gathering data, enabling triangulation and 'credibility', 'dependability', 'transferability' and 'confirmability' (Lincoln and Guba, 1985). The data collection and analysis for this PhD study took place over a number of years, as outlined in Table 4.1.

Table 4.1. Research objective, research phase, and timescale

Research objective	Research phase	Timescale
To provide an updated review the Welsh visitor attraction landscape	Secondary data analysis and review of attraction databases (discussed in Chapter 1)	2010-12; updated 2014 and 2015
To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool	Phase 1 online questionnaire survey	2013
To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool To explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences.	Phase 2 semi-structured interviews with attraction operators	2014
To explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences.	Phase 3 Netnographic review of online content	2015 and 2016

Using the data research carried out in Chapter 3 to establish a baseline population to improve the rigour of the sampling of Welsh visitor attractions, three phases of primary research were designed to gather data for analysis in line with research objectives 2 and 3. These methods evolved rather than being strictly pre-planned and determined at the outset of the study. Their evolution was in line with the exploratory nature of the study's overall research aim.

Initially, an online questionnaire was distributed to 450[37] visitor attractions in Wales, to enable analysis of the key marketing decision-making processes used by respondents, and their understanding of the visitor experience (Phase 1). The aim of this was to provide an insight into the business and marketing-related factors behind the operation and management of these attractions. In Phase 2 of the data collection, a group of owner-operators or managers of attractions, drawn from those that had provided contact details in Phase 1 (n=43), and a random sample of those that had not, were selected for further in-depth semi-structured interviews. This was intended to provide a greater depth of knowledge of the key marketing process issues influencing the operations of these attractions. Phases 1 and 2 collectively related to the second research objective of the study:

- To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool.

As part of the focus of the semi-structured interviews in Phase 2 the third research objective of the study was also included:

- To explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences.

In Phase 3 further attention of the researcher was paid to the third objective of the study in an attempt to corroborate the interview responses of the attraction operators about their management of online visitor comments and feedback. Given the interest in online communications and feedback relating to the visitor attraction experience, a netnographic approach was selected as most appropriate. This was undertaken within the guidelines of the netnography proposed by Kozinets (2015), and the methodology is described in greater detail in Section 4.5.1 later in this Chapter. Within the overall aim of this PhD thesis, it was recognised that a potential link between Welsh visitor attraction operators' website development and their levels of involvement with UGC sites could be investigated. Using the guidelines for netnographic research (Kozinets, 2015), the following research question (introduced in Chapter 1) could be investigated:

[37] These were the 450 mail-able attractions identified in Chapter 3

- 'Is there a link between operator awareness, uptake, and engagement with the management of online communications and feedback and high levels of satisfaction for Welsh visitor attractions recorded via online review sites?'

It was envisaged that examination of this research question would draw on the combined findings from research Phases 1, 2 and 3. The question is considered in Chapter 6 of this thesis as part of the research conclusions.

A critical analysis of the online presence of 84 selected Welsh visitor attractions was carried out as the main focus of the netnographic review. This involved examining key aspects of visitor attraction operator website content, the use of images and visitor information, through the application of analysis criteria adapted from Blum and Fallon (2001), a study noted to be of relevance to this research in Chapter 3. TripAdvisor and Facebook comments from visitors to the attractions were also examined alongside any associated responses from the attraction managers. The visitor attraction sample chosen for this netnographic analysis comprised the 43 Welsh visitor attractions in Phase 2 of this research, plus an additional 8 visitor attractions operated by Cadw, The National Trust and a Local Authority. These 8 were added to the Phase 3 sample in an attempt to glean a more representative and inclusive picture. In addition to this a further 33 Welsh visitor attractions were added from the list of Blum and Fallon (2001) to allow for critical comparison with their data. Thus, in total, online communications and feedback relating to 84 Welsh visitor attractions was analysed in Phase 3, using a variation of the combined evaluation framework approach[38]. A summary of the three primary research phases is provided in Table 4.2.

Table 4.2 Summary of the research phases by research objective, data collection method, and method of analysis

Phases	Research objective	Data collection method	Method of analysis
Phase 1	• To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool.	Online questionnaire survey	Descriptive statistics; Content analysis
Phase 2	• To investigate Welsh visitor attraction	Semi-structured interviews	Descriptive statistics; Content analysis

[38] This approach allows the evaluation of websites and UGC using agreed perspectives, list of features and criteria (Pendersen et al, 2002; Pu et al, 2011)

	operators' understanding of the visitor experience and its use as a marketing tool. • To explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences.		
Phase 3	• To explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences	Netnographic analysis of online content (websites, TripAdvisor and Facebook)	Variation of the combined evaluation framework approach

(Source: Adapted from Campos, 2016 p 8).

4.1.1 Positionality

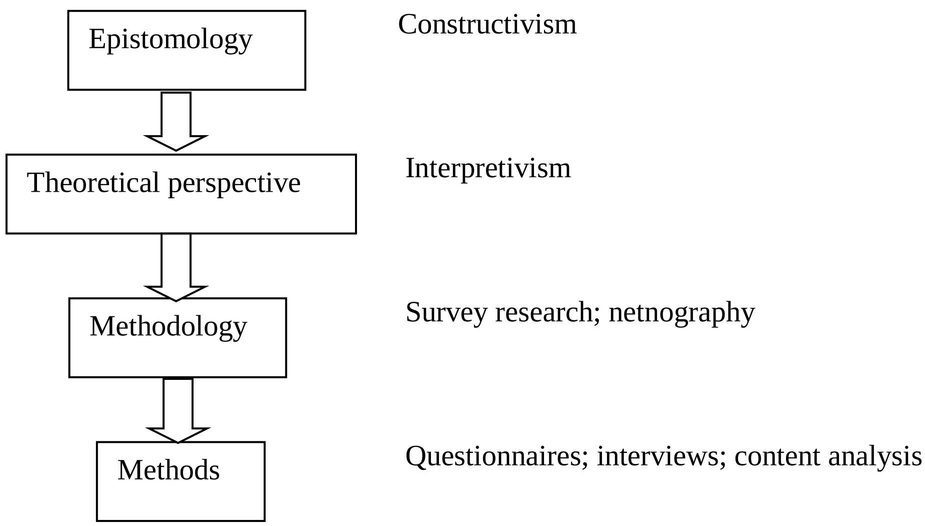
Whilst developing the methodology I was greatly encouraged to read that:

> "*professional experience can enhance sensitivity. Though experience can prevent analysts from reading data correctly, experience can also enable researchers to understand the significance of some things more quickly*" (Corbin and Strauss 2008, p 33).

However, in this PhD research study, I adopt an interpretivist approach, seeking to gain insights into the academic study of visitor attractions and have tried to keep the following points in mind: (i) to relate experience and knowledge to the data but not forget the primary importance of the data itself: (ii) concentrate on the properties and dimensions of concepts rather than just descriptive data; and (iii) it is the participant's opinion that matters, more than the researcher's perception of an event (Corbin and Strauss 2008).

In developing a research proposal, Crotty (2012) refers to four key phases that are interlinked and inform each other, but which should also be regarded as separate entities as shown in Figure4.1.

Figure 4.1 The four elements of social research in relation to this PhD study



(Source: Adapted from Crotty, 2012 p 4).

These elements can be used to describe the research process, covering the methods used to gather and review data, why those particular methods were chosen, and the philosophical and theoretical context underlying the process. The approach taken for this PhD research may be identified to be essentially interpretivist. It is not designed to test a theory or hypotheses but, instead, considers research questions based on hunches developed through a review of literature and my own background, and, thus, acknowledges that there is subjectivity involved in the interpretation of data presented in Chapter 5. Each research method has its own strengths and weaknesses, and will be described in more detail later in this chapter, but the intention was to select appropriate means of operationalising the research objectives (Silverman 2010). The mix of data gathering techniques used for this study allows for exploration of key themes surrounding the intended research focus as outlined in Chapter 1 and enables the emergence of new themes and insights also.

4.2 The methodological structure

The difference between the in-depth collection of qualitative data and the, allegedly more objective quantitative data can sometimes be decided by the resources available as much as the research objectives (Patton 2002). Effective social science research is problem driven and best uses a methodology suitable for that particular topic of study: "*it employs those methods that for* *a given problematic, best help answer the research questions at hand*" (Flyvbjerg 2006, p 242). This PhD thesis began with a thematic review of existing literature. As the work progressed, the exact focus of attention shifted to take into account emergent knowledge and insights. Thus, the literature review was not carried out solely in order to develop a framework for guiding and leading the research but acted as a loose framework on which to develop initial questions for the primary data collection phases. The three phases of primary data collection developed sequentially in line with a consideration of findings, post-analysis, of each phase in turn. They evolved, as did the findings, particularly in relation to the second research objective, as illustrated in Chapter 5.

The research approach needed to be able to deal with the subjective experiences of visitor attraction operators/managers in an area of study that lacked previous research (Daengbuppha *et al*, 2006). This also links to the observation that the attraction experience itself, for both visitors and managers may be inherently personal (Pine and Gilmore 1999). Therefore, "*an emic (insider perspective) based design will serve to achieve personal and multiple meanings associated with quality tourism experiences*" (Jennings *et al* 2009 p 304). Positivist and interpretivist approaches to research are sometimes viewed as the opposite ends of a research continuum (Hussey and Hussey 1997), with positivism originating in physical sciences and studies of behaviour taken from an outside viewpoint based on facts and observations (Veal 2006). In tourism studies, positivist and objectivist research seems to have predominated since the 1970s (Tribe 2004), and the possibility of using a positivist approach may have been more typical for the first part of this study in establishing the number of attractions in Wales meeting the Visit Wales definition (Chapter 3), chiefly to aid sampling in the empirical phases of this study. However, the author's own experience, as described in Chapter 3, cannot be excluded from this participatory paradigm (Heron and Reason, 1997). Since this PhD research set out to understand and theorise the attraction operators' responses to the visitor experience, as expressed in UGC on social media sites, it was considered that the "*open and unstructured approaches*" (Thomas 2004, p 210) held relevance. Co-operative research inquiry involves people in the research process, rather than being about them (Reason, 1988; Finlay, 2002). The involvement of attraction managers as respondents can, therefore, be seen as playing a part in the methodology and ideology of co-operative inquiry and community research described by Heron and Reason (1997). They showed that the three research paradigm characteristics identified by Guba and Lincoln (1994): methodology; epistemology and ontology, should be extended to include a fourth: axiology. This refers to questions of value in the context of human social interactions and participation in decision making (Heron, 1996). Each of these elements and their contribution in a research context is described by Hills and Mullett (2000), so that the participatory paradigm involves an interplay of the various realities – "*mind and the given cosmos are engaged in a creative dance, so that what emerges as reality is the fruit of an interaction of the given cosmos and the way the mind engages with it*" (Heron and Reason, 1997 p 279). Ontology deals with the nature and form of reality itself, and in contrast to the qualitative methods of orthodox research which values objectivity, co-operative or community research takes a subjective-objective position (Hills and Mullett, 2000). Epistemology deals with relationships between that which can be known, and the knower (Guba and Lincoln, 1994), and assumes a distinction between the two, so that they can be studied in an objective and true way, with no interaction or influences between them. An extended epistemology is therefore required in co-operative research that confirms the relevance and importance of already knowing. Thus, axiology is the fourth part of an inquiry paradigm suggested by Guba and Lincoln (1994) and as noted above, deals with notions of value and social participation.

The social constructivist approach is based on the "*realisation that facts … are socially constructed in particular contexts"* (Silverman, 2010, p 108). In this structure, the model is the framework within which reality is examined; ontology is its core part, and epistemology the status of the knowledge (Silverman, 2010). The ideas arising from a model are the concepts, necessary for examining the world to define the research problem. Concepts arranged to explain or illustrate an issue are termed theories: "*theory consists of plausible relationships produced among concepts and sets of concepts"* (Strauss and Corbin, 1994, p 278). They help to critically examine something in different ways, but are different from hypotheses, which are tested by research. There are no hypotheses at the start of many qualitative surveys; instead they emerge in the early analysis of the work. The hypothesis is then tested by its truth or validity. The methodology describes how something is examined, which data collection methods are used, and which specific methods or techniques are adopted. The intention therefore was not to carry out research in order to somehow test the validity, for example of Cherem's (1977) model as applied to the ‘experiencescape’ and marketing process at visitor attractions, but rather to allow the hypotheses to emerge from the analysis and then determine if a variation of the model could be devised to accommodate these.

The interpretivist paradigm suggests that there exists a set of multiple layers of reality that are important for the understanding of the relationship between the subjective experience of people and the objective reality (Hirschman and Holbrook 1986). The interpretivist starts their investigation in the empirical or real world in an inductive approach in order to identify phenomena and find explanations for them. Yet the relationship with the participants is often subjective rather than objective. The emic or insider perspective of the interpretivist allows for this examination of multiple realities and means that the views of all are equally valid (Jennings 2002). The acquisition of knowledge is done in a subjective way and is constructed as such. The constructivist grounded theory research approach was considered, since through the interpretive social science approach, it is suitable for dealing with subjective experiences (Uriely 2005).

> *“Grounded theory, if applied in its true sense, has scope and potential for the study of consumer behaviour and consumption experiences given its emphasis on context, theoretical emergence, and the social construction of realities”* (Goulding 1998, p50).

The process of developing a grounded theory approach is summarized in Table 4.3.

Table 4.3 The process of developing a grounded theory approach

Study Phase	Activity	Rationale
Research Process Design 1.Review of technical literature	Defines research questions; the research process, pilot study	Focuses efforts; minimizes irrelevant variation and enhances external validity
Data Collection 2.Developing data collections protocol	Employs multiple data collection methods	Strengthens grounding of theory by triangulation. Enhances internal viability; synergistic view
3.Entering the field	Overlaps data collection and analysis Employs flexible and opportunistic data collection methods	Reveals helpful adjustments to data collection under theoretical sampling concept Investigators can take advantage of emerging themes and unique case features
4.Data Ordering	Chronological event array	Facilitates data analysis and examination of process
Data Analysis	Open coding used	Concept development, categories and properties

5.Analysing data relating to the first case	Axial coding Selective coding	Connections between category and sub-categories to build theoretical frameworks Enhances internal validity
6.Theoretical sampling	Literal and theoretical replication of cases	Confirms and extends theoretical framework
7.Reaching closure	Theoretical saturation where possible	Ends process when marginal improvement becomes small

(Source: Adapted from Eisenhardt (1989)

In essence, thematic coding, comparison and analysis of data from interviews ensures that the data emerging helps to ground the theory within it (Douglas, 2003). The benefit of the constructivist and interpretivist approach therefore, was that it offered a clear framework, with guidelines to develop relationships within and between concepts. It allowed participants' own meanings and views to emerge with minimal intervention from the researcher. The relatively small sample size for the semi-structured interviews (Phase 2) and online sample (Phase 3) whilst a weakness in some respects, also meant that any negative impacts from a possible Hawthorne effect (Mayo, 1933) were not significant. Also known as the observer effect, this is an aspect of research where individuals may modify or change their normal behaviour in response to their awareness of being observed. This phenomenon could have impacted on the semi-structured interviews of Phase 2, and also if any online discussions had taken place in Phase 3 (McCambridge *et al*, 2014).

As described in section 4.4, through using directed, deductive analysis, a categorisation matrix is developed. Thus, the views of the attraction operators were obtained, and their experiences were interpreted. In examining critical theory models as applied to cultural studies, Denzin (1998) split it into two types, examining:

> "*concrete reality, dialectically conceived, as the starting point for analysis that examines how people live their facts of life existence; and social texts as empirical materials that articulate complex arguments about race, class and gender in contemporary life*" (Denzin 1998 p 331-332).

The empirical aspects of this research can be recognized to be part of this critical theory approach - the quantitative element and review of visitor attractions as they are now related to the concrete reality, whilst the social texts from open ended questions and semi-structured interviews, together with the analysis of online reviews related to the personal understanding and interpretation of visitor experience arising from the co-operative research.

4.3 Online questionnaire (Phase 1)

Although the overall aim of the research focused on a supply-side analysis and was exploratory in nature, the researcher was concerned about a lack of representational spread of Welsh attraction operator views in previous surveys pertaining to this group of tourism suppliers (as articulated in Chapter 3). With this in mind, the starting point for data collection was to identify a data collection method that allowed for a large sample size. A semi-structured questionnaire survey was selected for the initial phase of data collection (Appendix 2). Silverman (2010) acknowledges how a social survey using quantitative methods can be seen as an effective way of gathering large amounts of data as part of social research. It was recognised that a combination of closed and open-ended questions would allow for the collection of more detailed qualitative and attitudinal responses (Echtner and Ritchie 1993) alongside the identification of patterns or trends in the data. This allowed for flexibility in terms of exploring themes relating to the complex issue of visitor experience. The questionnaires were designed to maximise the amount of data collected but also to try and minimise question fatigue amongst respondents.

4.3.1 Questionnaire Design

The questionnaire was designed in line with the research objectives and areas of academic theory that were highlighted in the literature review in Chapter 2 relating to marketing and the visitor experience. The questionnaire was divided into themed sections. Table 4.4 provides an overview of the themes, the question ordering and their links to academic theory discussed in Chapter 2 of the thesis. The themes are re-visited in Chapter 5 when the research findings are discussed in relation to research objective 2 of the study.

Table 4.4 Questionnaire themes

Theme	Question number	Academic model
Marketing related – to get visitors	Q 9	Marketing mix
Visitor motivation	Q 10	Consumer behaviour
Visitor experience	Q 11, 14	‘experiencescape’
Measuring visitor experience	Q 12, 13, 16, 25	Quality models e.g. servqual
Experiential marketing	Q 15	‘experiencescape’

The marketing experience of attraction operators	Q 19, 20, 21, 22, 23, 24	Promotional mix
Management realities	Q 1, 2, 3, 4, 5, 6, 7, 8, 17, 18	Marketing process

Questions 1-8 were designed to provide background information including annual visitor numbers, date of opening, location, and admission charges. This was intended to provide the operational context of the respondents, related to the ‘management realities’ of each attraction. This information was also intended to facilitate the categorisation of attractions in relation to data analysis at a later stage. It should be noted here that initially inferential statistics were intended to be able to be used as part of the analysis of the survey data. However, a low response rate frustrated this goal. The idea of using a survey at the initial stage also reflected the researcher's personal experiences of working with the Welsh attractions sector - it was considered that this method would be less intrusive in terms of operator / manager time and more amenable than interviews.

There was also a desire to ease the respondents' completion of the survey by providing fairly straightforward, easy-to-answer questions that would provide useful quantitative data (Gill and Johnson 2010). Questions 6-8 sought to determine the main source of funding for a particular attraction which, in turn, was recognised to be an important indicator of the strategic direction of the attraction. For example, is the primary motivation to maximise income or are there other reasons for the attraction to be open? This was acknowledged to potentially impact upon the management of the visitor attraction (in line with literature considered in Chapter 2). Similarly, Question 9 focused on what each attraction operator sees as the most effective method for them to attract visitors, Question 10 seeking a consideration of visitor motivations for respondents' own attractions, and Question 11 asking respondents to further explain why they thought visitors came to their attraction were all intended to provide insights into attraction operators' understanding of the visitor experience. Following on from this, Question 12 delved further into the understanding of visitor experience and sought to discover if there was any difference between operators’ understanding of expectation versus reality for their visitors. This was also reflected in Question 16 which also referred to understanding of the visitor experience. In Question 13 information was requested on how feedback from visitors was obtained but avoided using the word ‘feedback’ in order to concentrate more holistically on the visitor experience. Question 14 was included to determine if attractions were consciously seeking to add value to a visit, an important element of experiential marketing – this could be through additional activities such as events or free audio tours, which give visitors something unexpected and add to the 'core' experience. There has been a growing trend in recent years to show pictures of visitors at attractions within publicity material such as leaflets and websites, and Question 15 asked if this is consciously done at all attractions. Questions 17 and 18 were linked to management realities and strategic objectives, to investigate to what extent attractions were planning for the future as well as developing the visitor experience.

In Questions 19-24 the intention was to determine the level of marketing expertise amongst the attraction operators as well as their awareness of specific marketing issues, to test their understanding and use of key elements of marketing theory such as segmentation, targeting and positioning and how it relates to attractions. Question 25 asked those attractions that had not participated in the VAQAS scheme the reason for not doing so. Question 39 was a useful benchmark for how much is spent by individual attractions on marketing activities and provides useful comparative information against a range of factors such as type and size of attraction. The section with ratings on the Likert scale sought to further investigate opinions and themes related to many of the above questions on visitor experience, but in a different structure to allow for comparison and cross-referencing where possible and appropriate, for example how the response to Question 27 relates to Questions 10-12 regarding visitor experience. This use of rating scales by the researcher acknowledged several advantages – they allow respondents to show their strength of feeling or agreement/disagreement about a statement; they improve validity by using similar questions to test key theories; and finally, they improve reliability by using different methods to look at key themes (De Vaus 2007).

4.3.2 Survey execution

A pilot survey was undertaken to gain feedback on the usability of the survey and questions. Three attractions were chosen for the pilot survey: a large public-sector museum in Swansea; a large activity and themed attraction in North West Wales; and a small, privately-owned themed attraction in Swansea. These were selected to be representative of the different types of Welsh visitor attractions but also, they had experienced and knowledgeable owners and managers that were able and willing to provide constructive feedback on the layout and content of the online survey. The proximity of the Swansea attractions to the researcher also meant that face-to-face meetings could be held with them to discuss the draft questionnaires in detail. Several phone calls to the North West Wales attraction also helped to ensure that feedback on the survey design was detailed but also comprehensible and as user-friendly as possible. Feedback from the pilot survey was very positive and no changes were made to the content or layout of the survey, apart from the correction of some minor typographical errors.

In determining the attraction sample for the full Phase 1 survey, the starting point was to review the 2015 list of attractions in Wales that had been identified in Chapter 3. It was decided to focus on all attractions with identifiable owners or on-site managers i.e. those who are responsible for, or could directly influence or manage the visitor experience at a particular place. The rationale behind this choice was to provide or produce a set of attractions with at least some commonality and comparability in understanding the marketing ethos and management principles that may be in operation. This therefore ruled out some of the smaller sites under the guardianship of Cadw, which had no staff on site, but included others that had Senior Custodians such as Harlech Castle[39]. National Trust properties that had their own property managers who had direct control over day-to-day aspects of the visitor experience at individual properties were also included. This process of selecting a sample was done in order to "*balance the risk of uncertainty against the time and money which would be necessary to reduce this still further*" (Baker 2002 p103).

The sampling strategy resulted in a list of 450 Welsh attractions. The very nature of completing a PhD thesis means that there may be some restrictions on sampling size and deciding on what is realistically achievable with the resources and timescale available (Oriande 2013, Marr 2007, Silverman 2010), but it was felt that this was an appropriate number to be sent the questionnaire used for the survey described in Chapter 5. An online method of delivery was chosen for reasons of convenience, speed and cost, whilst this method would also bring benefits in collating and reviewing the results obtained. Bristol Online Surveys (www.survey.bris.ac.uk) was chosen as the online platform for carrying out the survey, and the survey methodology is described below. A copy of the email message that accompanied the questionnaire and provided participant information in line with research ethics practice is included as Appendix 2, whilst the analysis

[39] Initially, Cadw sites had not been included as it was felt that they all conformed to the corporate policy of dealing with visitors both physically and online. It was later decided that this was a significant part of the 'attractionscape' and therefore the larger sites were sent the questionnaire in March 2015 and the results updated.

and discussion of the questionnaire and results are included in Chapter 5. The questions were designed to incorporate a variety of styles including: closed; open ended with the opportunity to provide comments; questions with optional answers with comments to expand on details further; and also, a series of questions that required respondents to rank their answers in order of importance or preference, using Likert-style tables. This was intended to provoke the interest of respondents.

The first series of emails were sent out with a link to the online survey during the period mid-October to early December 2014. The sample included the mailing list of 240 attractions from Visit Wales for an online survey that they undertook in 2012 that had 156 responses. Contributions were also taken from the VAQAS database of attractions and local authority listings as described in Chapter 3 to ensure that the final list was as comprehensive as possible. A further check was made by examining other websites including www.visitwales.com, www.TripAdvisor.co.uk and www.theaa.com. Twenty-five attractions of all types, large and small, did not have email addresses, but had 'contact us' sections on their website. These were sent individual messages with a link to the survey requesting their participation.

The emails sent to the 450 attractions resulted in an initial return rate of 42% (191) undeliverable or delayed responses. On checking, it was discovered that many email addresses were incorrect or were no longer in use e.g. the email had changed or, for example, information@ had changed to enquiries@, which was a surprisingly common occurrence. There were also many spelling mistakes from the databases or listings that had been provided from secondary sources. The emails were checked on individual attraction websites as well as over 140 telephone calls to attractions to check their email address and ask them to take part in the survey. Even after 'cleaning up' the database in this laborious and time-consuming way there were still 45 email addresses that were returned as undeliverable or delayed. In addition, 12 return messages quoted full mailboxes, whilst in 3 cases the attraction insisted that the address was correct, but the emails kept being returned as undeliverable. In the example of one major new themed attraction in Cardiff, when emails were sent, there was an 'undeliverable' reply each time, yet it subsequently transpired that the messages had been received. Another large local authority run attraction also had an undeliverable email address despite checking 3 times. During follow up phone calls to check on emails, staff at 38 attractions said that they had been too busy to check regularly on messages. This response came from a cross section of different types of attractions, with ownership or size not appearing to be relevant factors.

Eventually 81 attractions responded to the online survey. In total, 72 questionnaires were completed fully and 9 were only partially completed. This represented an overall response rate of 18% from the total of 450 attractions meeting the Visit Wales attraction definition and with onsite staff able to respond individually. During the online survey period, further emails were sent out to those that had not replied, together with follow-up phone calls. Feedback obtained from these phone calls included the following comments about the administered survey:

> *"too long for small attractions":*
> *"we don't have the time to fill it all in";*
> *"we don't have the experience or knowledge to answer everything"*,

Two respondents claimed that there were difficulties with the survey system itself. Subsequent checks with BOS showed that there had in fact been minor IT problems at certain times that would have affected the respondents' ability to complete the survey. It is not known if other attractions had similar issues which contributed to the overall disappointing response rate. Contact details for further information were provided by 43 attractions (53%), with the remainder, 38 (47%) choosing to remain anonymous (as was their right in line with research ethics protocol). Overall, the survey appeared to provide a good cross-section of replies from different types of attractions, of different sizes, based in different parts of Wales, as highlighted in the sample characteristics of respondents outlined in Chapter 5.

4.4 Semi-structured interviews (Phase 2)

The exploratory nature of the research aim and objectives necessitated the use of a qualitative approach, following on from the questionnaire survey. As aforementioned, 43 respondents from Phase 1 provided contact details that facilitated the sampling process in Phase 2. Through using selected examples of attractions, it was hoped to generate the more detailed qualitative responses that might identify and illustrate subjective differences in the responses to the qualitative elements of the online survey (Decrop 2004; Yin 2003). Each attraction in Wales can be in a different location and have its own unique features, yet it was hoped that by studying a variety of visitor attractions, drawn from different types and geographical locations, any similarities or themes in the way that they reportedly understood the visitor experience and its use as a marketing tool and engage with online communications and feedback relating to visitor experience may be identifiable or become apparent.

It is acknowledged that whilst an interpretivist approach does not support generalisations to be made, it can allow researchers to obtain an insight into particular events that may be common to some or all of them (Yin 2003). Other factors relating to the use of specific examples relate to choices in setting (location) and the processes or elements that are the focus of study (Silverman 2010). For this research a variety of settings were chosen, drawn from those visitor attractions included in the quantitative survey but with further refinement. The research focus (Silverman 2010) was on developing a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience. By extending the settings (locations), and comparing different attractions, it was recognised that common themes could possibly be identified, which may produce results that are relevant or comparable to other settings. Thus, for the Phase 2 semi-structured interviews, a sample was drawn from those that had completed the online questionnaire survey and those that had not responded. The latter group was deemed to be important in order to help provide a more representative sample of the 450 Welsh visitor attractions initially identified in the Phase 1 sampling frame.

Qualitative data analysis has been defined as "*a research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns*" (Hsieh and Shannon, 2005, p 1278. Qualitative research is defined by Cresswell (1998) p 15 as:

> "*an inquiry process of understanding based on distinct methodological traditions of inquiry that explore a social or human problem. The researcher builds a complex, holistic picture, analyses words, reports detailed views of informants, and conducts the study in a natural setting".*

The data can be collected in various ways including observation, questionnaires, interviews, reflective comments from participants e.g. diaries, blogs. In the first of the three approaches of Hsieh and Shannon (2005), open coding involves the creation of labels for any recognizable meanings that emerge from the iterative re-reading of the data. In the second approach, Axial coding seeks to identify any relationships or connections between open codes; and selective coding is where data relating to the core variable identified from further re-reading is selected and coded. Whilst most qualitative content analysis uses an inductive approach, this does not mean that deductive approaches can be excluded (Patton, 2002). Using concepts from other theories or studies can be used at the start of data analysis in qualitative research (Berg, 2001). The initial theory used in Phase 2 was based on the marketing themes originating from the analysis of the online questionnaire (Phase 1). Zhang and Wildemuth (2016) suggest that the themes become the measure or unit for analysis, and can be individual words, phrases, sentences, or a whole document. Open coding is still used to start creating order in the qualitative data (Elo and Kyngas, 2008). In the directed approach, initial categories are created, and the transcripts of the interviews are read through in an iterative process noting the specific aspects and themes from the content. Categories can then be brought together or clustered according to their meanings, to develop understanding and knowledge (Cavannagh, 1997). Through interpretation of the data the researcher decides which categories to use as part of the abstraction process. In this way, for a directed, deductive analysis, a categorisation matrix is developed, and the data checked to see if it still confirms to the allocated categories.

The individual semi-structured interviews were initially seen as a key part of the data gathering process, necessary to provide the qualitative data for analysis, and the direct feedback and opinions of attraction operators[40]. Other potential data collection methods were considered, such as focus groups, but the logistical considerations ruled this out early on – the possibility of getting an appropriate mix of relevant attraction operators together at one time would have been a huge task, even if trying to combine it with other meetings. The seasonal nature and small size of some attractions meant that key staff were not available, and even trying to get discussion groups (or similar) organised at gatherings of attraction operators, such as trade association events or other tourism meetings presented the same challenges of getting the right people together at the right time. That is not to say that this approach could not be used in future – in fact, with the appropriate research agenda in term of what was to be discussed or investigated, this round-the-table type of

[40] As the PhD developed, with more focus on the online digital footprint of attractions, more emphasis was placed on the netnographic approach as this developed in significance

approach may be perfectly valid for the right topic at the appropriate time. The approach chosen was therefore seen as a process which enabled representative key informants to be able to be interviewed at a mutually convenient time to provide individual subjective comments about their attraction and management practices in a confidential and impartial manner. As Patton (2002, p.245) notes:

> "*validity, meaningfulness and insights generated from qualitative inquiry have more to do with the information richness of the cases selected and the observational/analytical capabilities of the researcher than with sample size*"

It was essential therefore to have a variety of examples for analysis, and in Phase 2 a purposive sampling method was used (Yin 2003) to ensure that participants as far as possible reflected the diversity of the Welsh visitor attractions sector but could also provide the richness of response required (Patton 2002). Flyvberg (2006) explains that a random sample is not necessarily the best provider of the most in depth or relevant information. Since the intention of such qualitative interviews is not necessarily to develop a generalist overview, but rather to explore the responses of the selected example, the issues that arise are more to do with data saturation (Strauss and Corbin, 1998; Gibbs, 2002), when the same themes or responses start to occur.

The attractions were selected from those that had responded to the online survey and provided contact details, of which there were 43, together with a further 8 attractions from Cadw and the National Trust. This sample was reviewed by size (number of visitors per annum), location (town, county) and the category of attraction, to ensure that there was not a predominance of one particular type. At this stage, existing categories of attraction used by Visit Wales were deemed sufficient in order to group the attractions into types: castle/historic site; museum/gallery; built heritage; theme/amusement park; garden; wildlife attraction; aquarium/zoo; railway/transport; play activity. The researcher was mindful of his choices when attempting to gather a cross-section of attraction operator views. For example, it was important to acknowledge that larger attractions may have specialist staff involved with the strategic and tactical direction of operations and marketing, whereas the smaller sites and owner-operators may have no specialist training or previous experience of attraction management (Stevens 2003, Fyall *et al* 2008, Leask 2009). Shortlisting of Phase 2 follow-up interviewees also included attractions that were currently in (or had previously been in) the VAQAS scheme, as well as those that had never been in the scheme – again for reasons of trying to obtain a cross-sectional picture.

The face-to-face interviews were originally intended to take place at pre-appointed times convenient to the attraction managers/operators. A semi-structured approach was taken, so that the discussions could facilitate an organic development of key discussion points, thus also linking back to the ideal of allowing emergent themes to be identified. Semi-structured interviews also allowed for the "*contents and direction to be re-ordered, digressions and expansions made, new avenues to be included and further probing to be undertaken*" (Cohen *et al*., 2000, p.146). Ethical considerations were maintained at all stages of the research process, including the interviews. The key points, in line with Silverman (2010) and university ethics protocol, were that participation was voluntary and participants had the right to withdraw at any time; an assessment was made of the potential risks, and the benefits to participants were also made clear (insight into knowledge gained). Informed consent was gained prior to interviewing and anonymity of data was assured. Interviewees were informed that there would be no obligation to provide any facts or figures requested during the discussion. No complex issues of any kind were identified in the research ethics proposal stages that required additional attention. A copy of the interview discussion areas is provided in Appendix 4.

The questions link to the visitor experience and marketing theory identified in Chapter 2, as set out in Table 4.2 as part of an inductive process. Each interview began with an introduction and general discussion on attraction issues. Topics discussed included current visitor numbers and trends, how the season had been going and so on. This was to put the interviewee at ease and acted as a precursor to investigating visitor experience issues in more detail as the interview progressed. Some of the key points for introduction into the discussion were based on the analysis of the Phase 1 online surveys, but the interviews also allowed participants to provide much fuller replies and in=depth responses were sought.

An interview guide was prepared that would act as a loose framework to ensure that the discussions did not lose sight of the topics under investigation (see Appendix 4). As mentioned at the start of this section, the interview questions reflected the review of literature (Chapter 2); the researcher's own personal and professional experiences (Chapter 3), as well as the content of the online survey responses (Phase 1). In the majority of cases interviewer prompts were not necessary since once the interviewees started talking on a particular theme, they tended to cover most of the relevant details that were required for the analysis. Only occasional intervention was required to seek further details.

Each interview was recorded and then transcribed to allow for detailed analysis and coding (Fielding 1993). There are three types of coding: open, axial and selective (Matthews and Ross 2010). These can be used to identify the key elements of the themes. The first level assigns labels or categories to themes identified during the iterative review of the qualitative data. The second or axial stage is where codes or labels are linked to each other, often using a matrix approach. Finally, the selective stage involves deciding on a core or key category and linking everything else to it. In this way, the overall approach is driven by the data itself, not any particular pre-existing theory (Boyatzis 1998). The themes emerge inductively from the data and not from any theories and can be shown as a thematic network (Attride-Stirling 2001). This iterative process of re-reading and coding the data to identify themes and sub-themes is also mentioned as an important part of the analysis process by Bryman (2008). It helps to break down large pieces of text and highlight the key issues for further analysis. Table 4.5 shows the categorisation matrix adopted to summarise the results of the analysis. The completed table as a result of Phase 2 data analysis is included in Chapter 5.

Table 4.5 Categorisation matrix

Open code	**Properties**	**Participants' words/comments**
Marketing related		
Visitor motivation		
Visitor experience		
Measuring visitor experience		
Experiential marketing		
The marketing ability of attraction operators		
Management realities		

(Source: Adapted from Zhang and Wildemuth, 2016)

4.5 Review of websites and UGC social media sites (Phase 3)

Phase 2 of the research partially addressed research objective 3 in that interviewees discussed their engagement with online communications and feedback relating to their visitor experiences.

During the interviews, online comments were only given partial focus. Not all of the attractions indicated the relevance of online visitor feedback in relation to the visitor experience (this is discussed in Chapter 5). As noted in Chapter 1, Web 2.0 and other digital technologies such as 'apps'[41] have had a dramatic impact on tourism (Fotis *et al*, 2011; Munar and Ooi, 2012; Dickinson *et al*, 2014). The importance of providing online information that meets the experiential needs of visitors is highlighted by Kah et al (2010), and such information is necessary to meet the motivational aspects of the hedonic elements of visitor experience described by Hirschman and Holbrook (1982). "*For tourism practitioners, observing messages posted on review sites such as traveladvisor.com may help monitoring different kinds of destination images in a timely and cost-effective way*" (Jalilvand *et al*, 2012 p 134), and "*essentially, it is important for managers to respond professionally to negative reviews*" (Ayeh *et al*, 2013 p 447). The everyday use of online review sites and other sources of information such as search engines, has not only changed the way that people plan what they do, but also how they tell everyone else about it (Buhalis and Law, 2008; Munar and Jacobsen, 2013). Therefore, the scale and influence of sites such as TripAdvisor and Facebook have become of increasing importance to attractions and developing an improved understanding of how attractions use such opportunities is one of the objectives of this PhD research. Whilst an early focus of the research was on interviews with attraction operators, the emphasis changed as the thesis progressed to focus on a netnographic review of the online communication and feedback behaviour of Welsh visitor attractions.

4.5.1 The netnographic approach

Netnography is defined as "*a qualitative method devised specifically to investigate the consumer behaviour of cultures and communities present on the Internet"* (Kozinets, 1998 p.366). It has been recognised as a research method appropriate for researcher attempts to understand social interaction in the context of contemporary digital communications. The methodological perspective adopted for this study is the constructivist approach (Markham 2004). This approach understands the Web not as a neutral technological tool, but as a social construct and context that facilitates the examination of the creation and evolution of social structures such as relationships

[41] Apps (applications) are computer programmes, but the term generally refers to those that can be downloaded and run on mobile devices such as smartphones or computer tablets www.bbc.co.uk/webwise/guides accessed 03/03/16)

and communities. This method consists of participative observation and examination of one or several online communities and it has been used by social scientists in conducting Web research (O'Reilly *et al*. 2007). Kozinets (2002, 2008) describes this methodology as an online evolution of ethnography and defines it as an application of methods of cultural anthropology to on-line cyber culture.

A netnographic approach was identified as an appropriate method for Phase 3 of the research where insights were sought into the engagement of Welsh visitor attraction operators with online communications and feedback relating to consumer experiences. This phase focused on practice identifiable through observing websites and UGC relating to their social media sites. Thus, whilst Phases 1 and 2 of the research reported operator perceptions, views and opinions, this phase considered behaviour.

The term 'netnography' combines elements of the words 'internet' and 'ethnography' to provide insights into consumer behaviour within digital communities and cultures (Kozinets, 1998; 2002; 2015). A netnographic approach is argued to possess similarities with ethnography (Wu and Pearce, 2014), yet rather than striving to be a 'virtual' version of ethnography, it is argued that netnography can provide a framework for a rigorous investigation of on-line interactions (Kozinets, 2010; 2015). According to Kozinets (2015), five characteristics or 'archetypes' of netnography may be recognised (Table 4.9).

Table 4.6 Five archetypal practices of nethnography

1.Netnography involves participant-observation
2.Nethnography seeks to describe and theorize the human element of online human and technological interaction and experience
3.Netnography focuses primarily on data collected through the internet
4.Netnography adheres to strict and widely accepted standards of ethical online research
5.Netnography always includes human intelligence and insight as a major, but not always exclusive, part of data analysis and interpretation

(Source: Adapted from Kozinets, 2015 p 243)

Netnography, according to Kozinets (2015), should be regarded as complementary to other methods of online research and analysis such as 'big data' or 'social network analysis' rather than being seen purely as an alternative. It is concerned with developing a scientific understanding of online issues, without losing sight of human interactions online. For researchers, this requires full awareness that your own introspective position, and its inherent biases, is important, not least during the collection of data. However, as Kozinets (2015) emphasises the research direction should still be guided through the formulation of netnographic research questions (Table 4.10).

Table 4.7 Netnographic research questions: Guidelines

Action	Comments
1.Formulate a single, broad, guiding question	This can be narrowed down later
2.Ensure question is suitable for netnographic study	Does the question relate to online social interaction and experience
3.Formulate up to five sub-questions	These elaborate on the major question
4.Focus on the word being used	Use words such as 'where', 'how', 'when', 'what'
5.Experiment with exploratory verbs	'Discover', 'understand', 'explore', 'describe', report'

(Source: Adapted from Kozinets, 205 p 122)

These guidelines in Table 4.10 above, can be used as a framework for the netnographic research approach and direction. According to Kozinets (2015) there are then four choices of netnographic approach: auto, using field notes and reflexive observation; humanist, selectively using smaller amounts of data; symbolic, incorporating greater amounts of data; and digital, which is based on the largest collection of data. The amount of data involved and the type of netnography can influence the data analysis tools that may need to be used. Computer-assisted programmes can be used to help with data analysis, but there can be weaknesses with sorting and loss of focus, leading to unintended results. These weaknesses of netnography include the possible inability to provide deep insights, and issues of generalisation and validity (Sadovykh and Sundaram, 2017). The netnographic approaches to data interpretation and analysis used in this PhD thesis are described in more detail in Section 4.7.

Munar and Ooi's (2012) exploration of the heritage visitor experience identifies tourists' online reviews as "*mediators of the tourism experience*". The researcher wanted to explore Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experiences. This involved focusing on the website and UGC profile for each attraction in the Phase 3 sample.

In order to critically examine each attraction's website, a framework of features was developed, using content analysis to review website functionality and effectiveness (Ip *et al*, 2012), as described in more detail later in this section. Finding a common approach to evaluation was problematic since: *"there is no universally accepted method or technique for website evaluation*" (Tsai *et al*, 2010 p 938). By focusing on features aligned to the main requirements of visitors, or potential visitors to an attraction (opening times, contact details, attraction description), critical evaluation could be used to develop meaningful comparisons (Law *et al*, 2010). In identifying specific features and characteristics, a combined evaluation framework (Blum and Fallon, 2001; Chiou *et al*, 2010; Law *et al*, 2010; Pu *et al*, 2011) was devised that was specific to the needs of this analysis. An analysis of website evaluation studies examined the strengths and weaknesses of each technique previously employed by researchers.

It was apparent that evaluation by features and effectiveness can range from simple checklists to the balanced scorecard approach (BSC) [42] incorporating perspectives such as technical; marketing; customer; and internal perspectives with subcategories (Kim and Kim, 2010). The features chosen for this PhD study drew on those categories were to provide a framework for the analysis of each attraction website. The websites were analysed from the perspective of the visitor, focusing on specific parts/functions of the website in order to obtain a meaningful overall 'score' (Kim and Kim, 2010; Dickinger and Stangl, 2013). The review of previous studies of hotel websites by Ip *et al* (2012) found that whilst some researchers used a 5 or 7 point Likert scale, others concentrated on critical success factors to assess the functionality of the website, with functionality in this context referring to features of website content. Blum and Fallon (2001) were notable in their examination of attraction websites specifically using 47 characteristics classified into six groups, following the Marketspace Model of Dutta *et al* (1998)[43]. A similar approach was taken by Chiou *et al* (2010) in developing a web-marketing mix (WMM) with 53 criteria in five marketing orientated factors.

Table 4.8 Evaluation features of tourism websites

Author	Features or attributes considered
Dutta and Segev, 1999	Product; price; promotion; place; customer relations
Blum and Fallon, 2001	Product; price; promotion; place; customer relations; technical aspects

[42] The balanced scorecard is a management system that also incorporates elements of measurement (Kaplan and Norton, 1992)
[43] In examining the way that businesses were using the Internet, a framework for analysis was developed based on the 4Ps of the marketing mix, together with customer relations

Law *et al*, 2010	Information quality; security; website functionality; customer relationships; responsiveness
Tsai *et al*, 2010	Navigability; speed; links; relevance; richness; currency; attractiveness
Kim and Kim, 2010	Technical; marketing; customer; internal perspectives
Chiou *et al*, 2011	4PsC – product; promotion; price; place; customer relationship
Ip *et al*, 2012	Hotel description; hotel facility information; reservation information; surrounding area information; user-generated information
Dickinger and Stangl, 2013	System availability; ease of use; usefulness; navigational challenge; website design; content quality; trust; enjoyment
Bronner and de Hoog, 2016	Reliable/unreliable; extensive/limited information; unknown/well-known information; useful/non-useful information

(Source: The author, 2016)

The development of a framework for analysing the attraction operator websites in Phase 3 drew on the factors used by Dutta and Segev (1999), Blum and Fallon (2001) and Chiou *et al* (2011). The framework designed incorporated the web marketing mix groups of factors exemplified or displayed through features (Table 4.7).

Table 4.9 Factors and features incorporated in the website evaluation of Welsh visitor attraction operators in Phase 3.

Factor group	**Features described**
Product	Basic website; opening times; attraction address; contact details; description of attraction
Price	Admission fees shown (where relevant)
Promotion	Discount or special offers for website visitors; competition; online brochure request
Place	Online ticketing or booking; sales
Customer relations information	Information for different groups e.g. schools; online newsletter/news; feedback form; FAQs; guest book; comments from visitors
Technical aspects	Variety of images; more detailed virtual presence; animation/video or link to YouTube/audio; link to other websites; link to social media sites

(Source: Adapted from Blum and Fallon, 2001; Chiou *et al*, 2011).

It should be noted that in line with the focus of research objective 2, and the overall aim of the PhD study, understanding of the visitor experience, its use as a marketing tool, and marketing practice was considered to be important. This had formed part of the focus of the Phase 1 questionnaires and Phase 2 interviews. Phase 3 was recognised to provide an opportunity for the researcher to independently assess the behaviours of Welsh visitor attraction operators in relation to visitor feedback and communication via observation of publicly visible information. The online method facilitated this unobtrusive technique and allowed for naturalistic enquiry - there was no scope for attractions to distort the information process as they were unaware of the analysis and thus did not know when and how the review was taking place. The emic position of the researcher also helped to mitigate any possible ethnographic[44] issues that may have been apparent in the research (Kozinets, 2002, 2015). Attraction websites in the selected sample were examined for inclusion of the features in Table 4.7, using cross sectional content analysis[45] in the same way as Blum and Fallon (2001), so that a checklist was used to capture the results of each review.

Table 4.10 Features and characteristics for evaluation of attraction websites

Group Feature	**Factors**
Product	1.Basic website
	2.Opening times
	3.Attraction address
	4.Contact details
	5.Description of attraction
Price	6.Admission fees or free clearly stated
Promotion	7.Special offer or discounts
	8.Competition
	9.Online brochure request
Place	10.Online ticketing or booking
	11.Online sales or donations
Customer Relations	12.Information for different groups e.g. schools
	13.News section or newsletter
	14.Feedback form or guestbook available, FAQs
	15.Comments from visitors used on website
Technical	16.Variety of images used
	17.Animation; video; YouTube; audio
	18.Link to other websites
	19.Links to social media FB, TripAdvisor, Twitter
	20.More detailed virtual presence; access to archives

(Source: Adapted from Blum and Fallon, 2001)

[44] Ethnocentricity is the belief that one's own ethnic group or culture is superior to that of another (Pines *et al*, 2003)

[45] The systematic identification of characteristics of written, spoken or visual material, using a checklist and counting the frequency of occurrence (Bouma and Atkinson, 1995)

This checklist enabled systematic recording of the researcher's observations of attraction practices, relating not only to research objective 3 but also adding insights into attraction operators' understanding of the visitor experience and its use as a marketing tool (research objective 2). The criteria against which a mark was awarded are shown in Table 4.8, with 1 mark given for every feature present. This allowed for a percentage score to be calculated for each attraction website, in accordance with the principle established by Blum and Fallon (2001). During the researcher's analysis of the websites, emphasis was placed on the interactive features of the websites and how online visitors can respond and engage with them in the co-creation of experience (O'Dell, 2007). The resulting percentages (Appendix 8) are therefore not a review of user satisfaction with the website, but of user interaction (Pu *et al*, 2011). The other significant difference with attraction websites is that whilst some may have an element of e-commerce transaction, for example if they have online booking, ticketing sales or an online shop, their primary role is not just transactional since the main purpose is to encourage or support a physical visit to the actual attraction (Blum and Fallon, 2001). The only exception to this might be the 'virtual' parts to some major museum or gallery websites, where it is possible to explore the attraction or collection online, such as the 'Digital Zoo' described in Chapter 2. As the netnographic research and review of websites and social media sites progressed, it was noted that 'Google' search results also contained a rating score for some attractions, so this was also checked for each Welsh attraction entry in the Phase 3 sample in order to supplement the review of websites and selected UGC. In particular, a review of any subjective comments relating to the visitor experience provided on the UGC sites and how these were responded to and dealt with online by the attraction operators provided additional information for analysis.

In addition to the analysis of qualitative visitor comments, the scores or ratings provided by visitors were also considered. As noted previously, these scores can be highly subjective, open to misuse and be misleading in terms of an attraction's quality of experience. For example, if an attraction is rated on TripAdvisor as being 35th out of 35 things to do in a particular area, this might suggest that it is the weakest attraction. With respect to TripAdvisor the more ratings and/or reviews that each site receives, the more likely it will be that the overall response is going to give a more accurate picture of overall visitor experiences (www.TripAdvisor.com). Thus the 'base' or number of reviews provided for each attraction was considered to be an important factor to take into account in the analysis. Online UGC review sites (TripAdvisor, Facebook, Google) tended to use a five-point rating system which may have its origins in the Likert Scale developed for use in questionnaires (Dimotikalis and Papadakis, 2015). Whilst the 'average' rating could be seen as neutral, in many cases, it has been noted that, in the context of customer reviews, it tends to correspond to slightly negative comments (Dimotikalis and Papadakis, 2015), and for this reason, when devising an overall percentage score based on the ratings provided, it was decided that for Welsh attractions, a rating of 4 (very good) or 5 (excellent) would be 'positive' and a score of 1 (terrible), 2 (poor) or 3 (average) would be considered 'negative'. In this way it was possible to calculate an overall percentage score for each attraction based on its scores on each UGC site (where available) that could be used for comparison.

It should be noted that the number of individual reviews/ratings provided on many of the Phase 3 visitor attraction sites was very low, which meant that some attempts to compare online visitor feedback using statistical analysis would not have been valid nor appropriate. Furthermore, it should be re-emphasised that the purpose of Phase 3 was primarily to consider attraction operator engagement with online communications and feedback relating to visitor experiences rather than to assess or evaluate attraction performance *per se* based on quantitative metrics or scores. When examining the Phase 3 results however, the opportunity emerged to use chi-square analysis to determine if the observed distribution of results was due to chance (Pearson, 1900). This was linked to the research question to provide additional critical review and discussion of the results.

4.6 Ethical issues and netnography

Whilst a netnographic approach may have some differences as well as similarities with ethnography (Wu and Pearce, 2014), many of the basic ethical issues regarding methodological approaches to research, particularly around the need to protect anonymity, remain the same. There is a need to respect the context in which online data has originally been supplied. One of the leading academic researchers using netnography, Kozinets (1998 p370) states that:

> "*ethical concerns must be addressed by specifying how informed consent was obtained, how the dignity and interests of community members were respected, and by ensuring anonymity and confidentiality when required*"

Netnography can allow access to large digital communities and provide a rich source of potential data for researchers. Kozinets (2010; 2015) refers to work that has been done on examining trends and social behaviour amongst members of online forums, blogs and chatrooms. Many of these have rigid instructions about registering or enrolling, and codes of conduct that should be followed, including the sharing and dissemination of any data (Mkono and Markwell, 2014; Wu and Pearce, 2014). Where this data is stated as being publicly available, on UGC review sites for example, it has been argued that the guidelines do not need to be as rigorous as those suggested by Kozinets (2015), unless they include reference to specific individual user profiles (Weijo *et al*, 2014). A passive approach of observing and non-participation in online discussions and reviews has also been defended (Mucha, 2013). The research for this PhD thesis was undertaken using 'public' websites and open forums on UGC sites, but the requirements of anonymity and confidentiality were still respected where relevant and necessary. The UWTSD code of practice was adhered to at all times (www.uwtsd.ac.uk).

4.7 Plan of data analysis

As mentioned at the start of this chapter, I adopt an interpretivist approach, seeking to gain insights into the academic study of visitor attractions and have tried to keep the following points in mind: (i) to relate experience and knowledge to the data but not forget the primary importance of the data itself; (ii) to concentrate on the properties and dimensions of concepts rather than just descriptive data; and (iii) to acknowledge that it is the participant's opinion that matters, more than the researcher's perception of an event (Corbin and Strauss, 2008). As such I have noted a distinction between my position as a researcher (with related personal and professional experience surrounding the Welsh visitor attractions sector) and the researched (Welsh visitor attraction operators). The data collection process in Phase 3 required me to adopt the stance of an outside observer perhaps more explicitly than in Phases 1 and 2 but it was important still that critical analysis of online practice in relation to visitor feedback considered the emergent data from the netnographic review. Thus, overall, data analysis sought to derive meaning from interpretation of data (Kozinets, 2015).

However, theory-building was a goal of the research. By drawing comparisons and examining the links between the emerging theory (final outcomes of findings as will be discussed in Chapter 5) and existing literature (Chapter 2), it is possible to improve and "*enhance the internal validity,* *generalisability, and theoretical level of the theory building*" (Eisenhardt, 1989 p 545). The purpose of any analysis is basically to examine the data; summarise it; seek for patterns and related themes within the data; identify any relationships that may exist between the patterns and themes; and propose interpretation or explanations for the relationships (Walsh, 2003). In order to facilitate and indeed, succeed in this, the researcher must immerse themselves in the data and become thoroughly familiar with it. In making these explanations or inferences, however much they strive to be objective, the researcher is still to some extent influenced by previous experience: "*without some background, either from immersion in the data or professional/experiential knowledge, the ability to recognise and give meaning is not there*" (Corbin and Strauss, 2008, p 46). The researcher can therefore bring the benefits of previous experience to give an added dimension to the interpretation.

> "*Interpretation is a productive process that sets forth the multiple meanings of an event, object, experience, or test. Interpretation is transformation*" (Denzin, 1998, p 332).

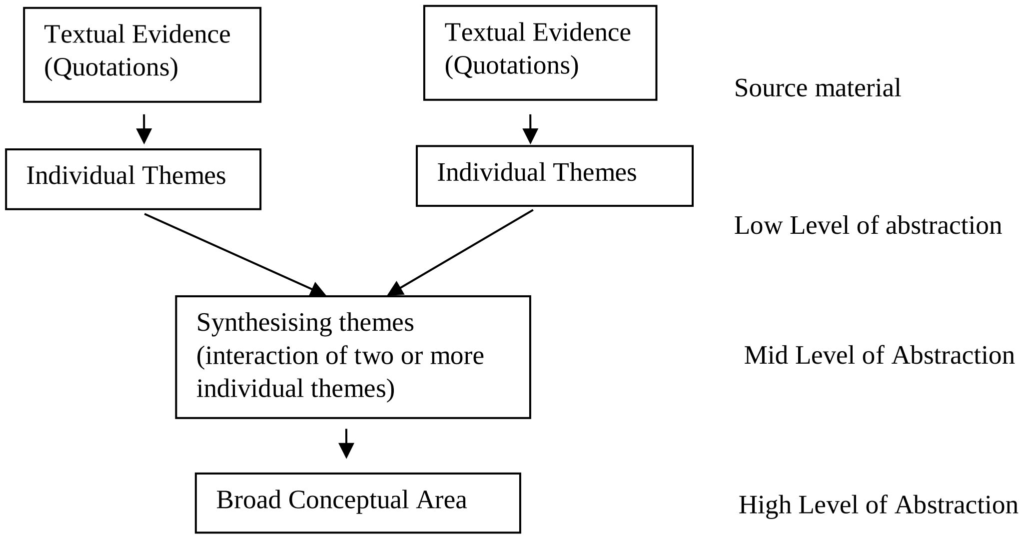
An emic perspective was assumed, and data gathering involved both an iterative and inductive process. In seeking to analyse and bring meaning to the data and identify meaningful relationships, the very nature of the data itself was complex, collected from a variety of sources. These included the quantitative questionnaires, listening to recordings from semi-structured interviews, critical analysis of web site reviews, Trip Advisor and Facebook comments and responses from attractions, as well as the researcher's own notes from discussions during VAQAS assessments and other field notes during visits to Welsh attractions over at least 3 years. This variety meant that it would be very difficult to use a computerised software programme such as NVivo for the analysis of the qualitative data, and a manual method of data analysis was therefore chosen.

4.7.1 Thematic Framework

A thematic framework of data analysis (adapted from Thomas, 2004) was adopted. After data familiarity and immersion and a process of coding had been completed, themes were abstracted from the data. This involved examining source material, highlighting individual themes and synthesising these by identifying commonalities, before identifying higher level 'concepts'. Thus, a series of defined categories were developed and from which distinct themes were identified.

Further examination and analysis led to the development of broader concepts to use as the basis for the research findings. This process can be shown diagrammatically (Figure 4.4):

Figure 4.4 Hierarchical structure of the thematic framework



(Source: Adapted from Thomas, 2004)

The process was a useful, systematic way of analysing and summarising the data. Whilst Crotty (1998) confirms the usefulness of interpretations, it is also suggested that there is no single over-riding true or valid interpretation, and that this is what distinguishes constructivism from other methodological approaches. Case examples can have meanings or patterns imposed on them and theoretical statements can be made (Flyvbjerg, 2006), but there must always be the supporting evidence (Cohen *et al*, 2000). It has been argued that thematic analysis can help to transform qualitative information into quantitative data (Boyatzis, 1998), where the main themes can emerge from the data itself rather than from a theoretical basis.

In Chapter 5, quotes from, and direct references to, the contributions of participants/respondents were therefore used wherever possible to underpin the discussion and illustrate findings and themes. As mentioned earlier, although generalisations may not be made that are applicable to all visitor attractions, the benefit of using specific examples from a variety of participants means that at least some, relevant themes may be highlighted to reflect real life practice as well as issues pertaining to academic theory.

4.8 Chapter Conclusion

The issues faced within this study were similar to those encountered during doctoral work in social sciences, in terms of time and finance available. The emic or insider view that was brought certainly helped with the access to attraction staff and being able to access informal and other networks within the attractions sector. However, this may have been a weakness in terms of bias and subjective viewpoint emanating from my own previous experience in the industry. The social constructivist direction taken for the more detailed qualitative study was deemed the most appropriate way of obtaining the data, using qualitative responses to attraction operators' in-depth views on the visitor experience and the management of their attractions. The initial plans for carrying out on site interviews had to be amended during the data gathering period, which resulted in telephone interviews being selected as the method of implementation. The data from these and the analysis of online reviews were coded and analysed manually to reveal certain themes. These were further refined into conceptual themes which acted as the framework for presenting the findings from the second phase of the research, in a way that could be used for comparison with the evaluation features of visitor attraction websites.

In line with the main aim of this PhD research ('*To develop a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience'*). Examination of Welsh attractions' online presence was based on a netnographic methodology that incorporated analysis of websites, UGC on TripAdvisor and Facebook pages, and where available, Google search result pages. A combined evaluation framework was devised using specific features and characteristics to allow for overall percentage scores to be given for websites. The response of Welsh visitor attraction operators to visitor comments was noted, and visitor satisfaction with attractions, as expressed through positive and negative reviews on the social media sites was measured by converting into a percentage score, as shown in Chapter 5.

Chapter Five

Results

5.1 Presentation of results

In this chapter the primary data research findings are presented in line with the study's research objectives. The first part of the chapter provides an overview of the sample characteristics for the primary data collection Phases 1, 2 and 3. The next section focuses on Welsh visitor attractions operators' understanding of the visitor experience and its use as a marketing tool. It draws on the responses from the online questionnaire and the semi-structured interviews (Phases 1 and 2 of data collection). In the final part of the chapter, the findings are discussed in relation to Welsh visitor attraction engagement with online communications and feedback relating to visitor experience (Phase 3 of the data collection). Throughout the chapter the findings are considered alongside key themes highlighted in the literature review presented in Chapter 2. Chapter 6 - the concluding chapter of the thesis – considers the overall findings in relation to the research question and the overall research aim presented in Chapter 1.

5.2 Sample characteristics for Phases 1, 2 and 3

It is useful to present the sample characteristics for Phases 1, 2, and 3 as a discrete part of the findings and discussion relating to research objectives 2 and 3. To some extent the sample characteristics contribute to research objective 1 of the study in that they inform an updated review of the Welsh visitor attraction landscape presented earlier in Chapter 3. That chapter was intended to be able to inform all three phases of empirical research in terms of representation cross-sector in line with the baseline of visitor attractions in Wales in 2015.

5.2.1 Characteristics of the Phase 1 sample

It is important to note that the total number of responses are different for many of the questions, reflecting some incompleteness of survey replies. The online questionnaire survey achieved a response rate of 18% (81 out of 450 attractions surveyed). This was lower than expected and also below the normal rate for an online survey, of over 30% (Nulty, 2008). This is also below the response rate for the mailed-out annual Visit Wales attractions survey of 32% in 2015 (Table 3.1). However, there is evidence that more detailed online surveys such as this one, can expect lower response rates of between 10-25% (Fan and Yan, 2010; Sauermann and Roach, 2013). The size of the dataset meant that inferential statistics could not be performed. Instead, the results are presented in line with salient themes that emerged, prior to being followed up through the in-depth semi-structured interviews undertaken in Phase 2.

Table 5.1 outlines the responses received by type of attraction in Phase 1. In the 'museums & galleries' category, similar numbers of open attractions were apparent over the time period in question, except for North Wales where they had risen in number from 27 to 38 (+29%).

Table 5.1: Phase 1 respondents by type of attraction

Attraction type (by Visit Wales category)		% of respondents	Number of respondents
Historic building or castle:		14%	11
Museums and Galleries:		33%	27
Gardens:		3%	3
Farm attraction:		1%	1
Theme park or activity centre:		6%	5
Wildlife or zoo:		5%	4
Nature or landscape:		2%	2
Transport, including railway or boat trip:		7%	6
Other *(please specify)*:		27%	22
	Total	100	81

Table 5.2: Geographical location of Phase 1 respondents

Region		% of respondents	Number of respondents
South West Wales:		21%	17
South East Wales:		25%	20
Mid Wales Wales:		24%	19
North East Wales:		3%	3
North West Wales:		27%	22
	Total	100	81

With respect to the location of the attractions that responded, it can be seen that a fairly even regional spread was achieved, with the exception of North East Wales (Table 5.2)

It was initially considered that this may, in part, reflect the fact that there are fewer large attractions in that area (Welsh Government, 2015) and smaller attractions often depend on volunteer staff, sometimes posing time constraints that frustrate research participation in addition to operational activities and priorities. However, this is not supported by the data in relation to size based on visitor numbers (Table 5.4).

Year of opening to the public (Table 5.3) was of interest to the researcher in terms of Phase 1 respondents because essentially it provides an indication of business survival rates, often taken to reflect successful management (and marketing) practice as well as satisfaction with visitor experience. Survival rates are particularly interesting within the context of the visitor attractions sector, given observations around over-supply (Stevens, 2000a; 2000b; 2003) and demand displacement rather than absolute visitor demand growth patterns, as acknowledged in Chapter 2.

Table 5.3: Phase 1 respondents by year of opening to the public

Year of opening	% of respondents	Number of respondents
1841 - 1902	13	10
1906 - 1957	9	7
1960 – 1978	14	11
1980 – 1990	18	14
1991 - 2000	19	15
2001 - 2010	16	12
2011 - 2014	10	8
Total	100	77

Only 77 out of the 81 respondents provided information relating to year of opening to the public. 1841 was the earliest stated date that the responding attractions opened to the public and 2014 was the latest date. This profile appears similar to the survey carried out by Stevens (2000a) which noted a major growth in the number of attractions in Wales in the 1970s and 1980s. It also may be seen to confirm the secondary data evidence determined in Chapter 3 which suggested that a growth in the number of new attraction start-ups had continued between 1998 and 2015.

Table 5.4: Phase 1 respondents by visitor numbers

Number of visitors	% of respondents	Number of respondents
<5,000	21	13
5,000-10,000	12	7
10,001-15,000	12	7
15,001-20,000	3	2
20,001-30,000	13	8
30,001-40,000	7	4
40,001-50,000	3	2
50,001-60,000	5	3
60,001-70,000	2	1
70,001-80,000	3	2
80,001-121,000	2	1
121,001-130,000	3	2
130,001-200,000	5	3
205,000	2	1
276,000	2	1
450,000	2	1
Don't know or not sure	5	3
Total		61

Responses on visitor numbers were only provided by 61 out of the 82 survey respondents, representing 74% (Table 5.4). A further 3 attractions reported that they did not know or were unsure of their visitor numbers. Thus, 30% of the 82 survey respondents did provide visitor numbers.

A spread of responses was achieved in terms of attraction size in terms of visitor numbers (Table 5.4). The lowest number of visitors given was 650, whilst the highest was an estimated 450,000 per annum. Here, diversity in the scale of operations is indicated. In terms of marketing activities and visitor experience literature suggests that the larger attractions, with dedicated marketing staff have more resources to be able to focus on such issues (Dibb, 1995; Pomering *et al*, 2011)

These figures show that there was a good representation from attractions of all sizes in terms of numbers of visitors, and especially from some of the smaller attractions who contributed to the survey as well as those with a much larger scale of operation. The total number of visitors to the attractions that provided figures was just under 4 million (3,990,509), with a median average of 67,636. The number of attractions with less than 50,000 visitors was 67%, similar to the picture provided by Stevens (2000a) where the majority of Welsh visitor attractions in his study were those that had smaller visitor numbers. In fact, the small size of operations dominating the sector is reflected through those attractions that had fewer than 15,000 visitors per annum, which made up 46% of the survey respondents.

Table 5.5: Admission charges by Phase 1 respondents

Admission charged?		% of respondents	Number of respondents
Yes:		60%	49
No:		40%	32
	Total	100	81

This holds relevance for analysis of the visitor experience since satisfaction in terms of value for money is not expected to be a concern of non-charging attractions. However, the links between value, satisfaction, and quality, do have an impact on aspects of the overall visitor experience (as demonstrated in Chapter 2), particularly if visitors are deciding if the entry charge or overall experience at the visitor attraction was 'value for money'(Chen and Tsai, 2006; Chen and Chen, 2009). This split of charging/free is comparable with the Visit Wales picture across Wales of 67% charging and 33% free attractions from the respondents to the 2015 survey (Welsh Government 2016). The relatively high number of responses from 'museums and galleries' should be borne in mind here in terms of free visitors (in line with National Museum of Wales policy, for example).

Table 5.6: Main sources of funding for Phase 1 respondents

Main source of funding		% of respondents	Number of respondents
Admission charge:		33%	46
Endowment or trust fund:		1%	2
Donations:		18%	25
Grant:		21%	30
Other *(please specify)*:		27%	38
Total			141

Other sources of funding included mention of secondary spend through retail and catering, souvenirs, events, accommodation and membership scheme/season ticket. The figures in Table 5.6 showed that for many attractions their main source of funding was a combination of one or more categories i.e. admission charge and secondary spend (other).

Table 5.7: Most significant revenue source for Phase 1 respondents

Most significant revenue source	Number of respondents	% of respondents
Admission charge	27	44%
Grant	17	27%
Donations	7	11%
Membership or season ticket	6	9%
All	3	5%
Events	1	2%
Catering	1	2%
Total	62	

Of those attractions that replied, the majority (44%) stated that the admission charge was the most important for them, whilst 27% said the most significant source of income was their grant aid. Events and catering were significant for only a few attractions, but donations (11%) and membership/season tickets (9%) were still quite significant sources of funding for others. Retail was unfortunately omitted as a category, which may have given additional insight into sources of income.

Table 5.8: Ranking of importance of providing visitors with something interesting to see

Ranking	Number of respondents	% of respondents
1	28	39%
2	29	40%
3	7	10%
4	2	3%
5	3	4%
6	3	4%
Total	72	

Whilst the majority of attractions gave a high ranking to this as the main reason for being open, 11% gave a score of 3-6, perhaps suggesting that their main reason for being open was not to provide something interesting, but for other reasons.

Table 5.8.1: As a business to make money

Ranking	Replies	%
1	13	19%
2	10	14%
3	11	16%
4	14	20%
5	9	13%

6	12	17%
Total	69	

The opinions appeared to be divided in the response to this question, and whilst there was a polarisation, the responses were also spread across all points of the scale from 1-6. There were 69 attractions that gave a ranking, with 49% saying that operating as a business to make money was important (ranking 1-3), whilst 50% said that this was not important to them (ranking 4-6). This clearly showed the different attitude and approach between those attractions that are solely reliant on the income that they generate and those perhaps that are supported in the main by grant aid or other sources of funding.

Table 5.8.2: To make a special feature, place or collection open to the public

Ranking	Replies	%
1	36	50%
2	15	21%
3	15	21%
4	4	6%
5	1	1%
6	1	1%
Total	72	

72 attractions replied to this question with a clear direction given in the answer that they are there to provide access to a something special or unique for visitors, with 91% saying that this was important to them. This confirms the product-led approach of many visitor attraction operators identified in Chapter 2.

Table 5.8.3: As a lifestyle choice

Ranking	Replies	%
1	1	2%
2	6	10%
3	7	11%
4	19	30%
5	13	21%
6	17	26%
Total	63	

Only 63 of the attractions provided a ranking for this question, but of these it was obviously the key factor for a few, but not so important for the majority. This perhaps reflected the difference between the small, owner-operated attractions and the larger ones that have salaried staff or even volunteers to help them run the attraction.

Table 5.8.4: Something had to be done with the buildings

Ranking	Replies	%
1	3	5%
2	2	3%
3	3	5%
4	9	14%
5	20	30%
6	28	43%
Total	65	

This question was included partly as a test question to check that respondents were giving considered responses to the questions and was meant to reflect the comment from one local authority museum manager that the main reason the collection was housed in a certain location was that they '*had to do something with the buildings*' and also had to find a 'home' for the collection, and so brought the two together. Unsurprisingly, the majority of attractions do not give this statement great importance as the driving force for their strategic direction.

Table 5.8.5: Other

Ranking	Replies	%
1	16	26%
2	2	3%
3	9	15%
4	2	3%
5	2	3%
6	31	50%
Total	62	

62 attractions gave a ranking in response to this question, with over 50% saying that whilst there was another reason for operating the attraction, this was not seen as important. The responses given for this did, however, go further to explain part of the motivation for the operation and raison d'etre of some attractions. Most of the comments included words such as conservation, heritage, preservation, culture and education. They varied from '*conservation of the building and estate', 'preserve heritage', 'to save the building for public use',* to *'farm diversification' and*

'this is a silly question'. Whilst it was possible to investigate the rankings and the reasons for them, the original intention with Question 7 was to try and get a clear ranking of 1-6 in scale of importance for each of the options (a) to (f) in comparison with each other, so that the main reason for operating the attraction could be seen. This was not possible due to an error in the template design which allowed respondents to rank each option of (a)-(f) on a scale of 1-6 individually. This was not identified as a possible weakness during or after the pilot survey, but with hindsight it may have confused some respondents or made the responses more complicated and detailed than necessary. It does still show that there was a clear divide between those attractions that are in existence purely to make money, and others where their main purpose is for other reasons such as to provide public access to a building or collection, rather than solely to make money, as shown in Table 5.7.2. The need to generate income has become increasingly important even for those attractions that depend on grant aid or other sources of income, and this is shown in the responses.

5.2.2 Characteristics of the Phase 2 Sample

At the start of Phase 2 the interviews were piloted. Appointments were made to interview the owners or senior staff at two attractions in West Wales. The first interview lasted 40 minutes, but much of this time was taken up by introductory discussions and points that were not all directly relevant to the research. Whilst transcribing this first interview, it became apparent that the main part of the discussion actually lasted for 15-20 minutes. Whilst confirming the arrangements for the second interview, the respondent apologised and said they had to cancel the meeting because of other commitments but would be willing to complete the interview by phone if that was possible. A telephone interview was subsequently carried out and recorded with consent. This interview lasted approximately 20 minutes.

This telephone interview method was considered successful in capturing all the key elements required for the research and analysis, and it was then decided that for reasons of expediency and practicality as well as consistency that the remaining interviews would be conducted in this way. This proved to be a major benefit in terms of reaching attractions in a widespread distribution across Wales; time was not wasted travelling to diverse (sometimes remote) geographical locations. All of the attractions contacted agreed to the telephone interviews, although in two instances these had to be re-arranged for a different time, and in one instance with a different person. By asking to speak to the owner, duty manager or senior marketing person, it was usually possible to get through to the person that had the ability and knowledge to answer the questions. In only one instance, a small museum based in Mid Wales, did the respondent not fully answer all the main questions. That interviewee decided they did not want to carry on with the interview until they had seen all the questions in advance. The possibility of an on-site, face-to-face interview was suggested, this was declined, and a paper copy of the Phase 1 online survey was requested. This attraction subsequently completed the online survey, albeit hesitatingly – in a follow up call, they said that they would normally only complete a paper-based questionnaire. No explanation was provided as to why they expressed this preference.

The initial intention to carry out 20 interviews proved to be more complex than anticipated, and after the first 10-12 interviews, the data collection strategy was reviewed. Many of the responses appeared to be similar in style and theme. It was therefore decided to stop interviewing after 16 because it was felt that a point of saturation had been reached. (Silverman, 2010; Sirakaya-Turk *et al*, 2011). With hindsight, it is acknowledged that this was perhaps an error of judgement. Continuation of the Phase 2 interview process may have resulted in a greater breadth and depth of views for analysis.

5.2.3 Characteristics of the Phase 3 Sample

For reasons of expediency, it was decided to use a purposeful[46] sample based on the 81 Welsh visitor attractions that had responded to the online questionnaire in Phase 1. From this sample, 43 of those responding had provided contact details in order to get information on results or take part in further research. They tended to be independent attractions of all types and sizes, but few National Trust or Cadw (although these may have responded anonymously to the online survey). It was therefore decided to choose another 8 attractions from the non-respondents from the Phase 1 online survey, in order to make the analysis more representative of the sector. The additional sites chosen were drawn from each part of Wales (North, Mid and South) and included 3 Cadw, 3 National Trust, 1 Local Authority and 1 independent. The full list of attractions chosen is listed in Appendix 8. A further selection of attractions was taken from the list of Blum and Fallon (2001)

[46] This is a commonly used approach in qualitative research for the selection of information-rich sources linked to the area of study (Palinkas et al, 2013)

to allow for comparison with their reviews. Of Blum and Fallon's (2001) 53 attractions, 12 had closed or were deemed to no longer meet the Visit Wales attraction definition, and 8 were already in the list of those replying to the online survey (Phase 1). This resulted in an additional 33, bringing the total Phase 3 sample to 84 attractions as shown in Appendices 5-10. This was a sample size of 19% of the 450 attractions sent the online survey, and 14% of all attractions meeting the Visit Wales definition in line with the discussion provided in Chapter 3 and research objective 2. The geographical distribution of the attractions in the Phase 3 sample is shown in Figure 5.1. On this map, categories with less than 5 members (boat trip; countryside; gallery; garden; heritage centre; indoor play and theme park) were included as 'others', since the limitations of the mapping software meant that it was not possible to include them all individually (Appendix 9)

Figure 5.1 Geographical distribution of the 84 Welsh visitor attractions in Phase 3

(Source: The author, 2017)

5.3 Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool (Research Objective 2)

The use of various marketing techniques and tools by Welsh visitor attraction operators was investigated using an online questionnaire (Phase 1) and semi-structured interviews (Phase 2). Both survey methods presented the opportunity to ascertain the levels of marketing capability, and the awareness and understanding of the operators of visitor experience at their attractions. In the following sections, the main findings of each of the two phases of research are presented prior to a combined analysis of the two sets of results as the basis for determining the links between the Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool, in line with Research Objective 2.

5.3.1 Marketing and Welsh visitor attractions in Phase 1 sample

The visitor attraction operators were asked to rank marketing activities in order of importance for their business. This provided insights into their marketing practice.

Table 5.9 Marketing activity - Promotional leaflet

Ranking	Replies	%
1	24	36%
2	14	21%
3	9	14%
4	4	6%
5	6	9%
6	1	2%
7	1	2%
8	2	3%
9	2	3%
10	3	4%
Total	66	

The number of attractions providing a response to this question was 66, with 86% stating that a promotional leaflet was important i.e. providing a ranking between 1-5. There were 9 attractions that ranked a promotional leaflet was not important, with 5% of these stating that the promotional leaflet was the least important of their marketing activity. This is confirmed by the comments below.

The following comments were provided: *'leaflets for distribution in local tourist information centres'; 'useful all year round, picked up by passing tourists, tour operators etc'; 'we do not currently have a leaflet'; 'we do not have promotional papers'; 'we have never done any paid advertising'.*

Although there were only few comments provided for this question, those that were given showed that whilst some confirmed the positive use of promotional literature, a few attractions did not see the need to produce printed leaflets.

Table 5.10: Marketing activity - word of mouth

Ranking	Replies	%
1	18	25%
2	15	21%
3	12	17%
4	8	11%
5	9	13%
6	5	7%
7	3	4%
8	1	1%
9	0	0%
10	0	0%
Total	71	

Surveys of visitor attractions (Swarbrooke 2010; Visit Wales 2014) regularly report that 'word of mouth' is given by visitors as the most frequent reason as to how they heard about an attraction or why they decide to visit. It is not surprising therefore to see attractions giving it a high ranking, with 87% putting it in 1-5 in order of importance. What is more nebulous, perhaps, is how the word of mouth is developed, and as described in Chapter 2, opinions about a particular attraction will be built up from a variety of sources, so that even if someone has not actually been there, it may still be possible for them to have developed an opinion about it. These opinions can be supported and confirmed by media stories, the comments of friends and family, and by sources such as TripAdvisor. The responses provided by attraction operators to this included:

> '*This is really important, and we go to a lot of shows where we make personal contact with potential visitors'; 'always best'; 'building local support and customer loyalty'; 'most* important

for having locals find out about us'; 'local reputation, promotion from TIC'; 'network of loyal supporters and return visits'; 'well known locally'.

An interesting point here is that although there are relatively few comments, several of them mention local issues, as if the word of mouth is important for increasing visitor numbers but also in terms of reputation and gaining support.

Table 5.11: Marketing activity - road signs

Ranking	Replies	%
1	5	8%
2	5	8%
3	8	12%
4	9	14%
5	4	6%
6	6	9%
7	9	14%
8	7	11%
9	7	11%
10	6	9%
Total	66	

Next to word of mouth, 'saw the road signs' was often quoted by visitors as one of the main reasons for visiting an attraction (Swarbrooke 2010; Visit Wales 2014), yet the responses from attraction operators were spread over all rankings, with slightly more (54%) putting them in category 6-10 i.e. not important. The provision of signage to attractions on highways has long been a point of discontent with many attractions, yet it may be that clear guidelines from the highway authorities (councils for local roads and the Welsh Government for trunk roads and motorways) has now helped to clarify the criteria for gaining new road signs to specific attractions.

Table 5.12: Marketing activity - paid advertising

Ranking	Replies	%
1	1	2%
2	0	0%
3	4	7%
4	8	13%

5	9	15%
6	5	8%
7	12	20%
8	5	8%
9	11	18%
10	7	12%
Total	61	

The response from attractions about the importance of advertising was largely negative, with 66% stating that it was not important (rank 6-10). This perhaps reflects the views of the smaller attractions with very limited marketing budgets that are not able to spend any significant amounts of money on paid for advertising.

Table 5.13: Marketing activity: media coverage or PR

Ranking	Replies	%
1	6	9%
2	9	14%
3	8	12%
4	8	12%
5	8	12%
6	15	23%
7	6	9%
8	4	6%
9	1	2%
10	0	0%
Total	65	

Slightly more attractions thought that PR and media coverage was important to them (59% in 1-5) than those who did not consider it important, but this was fairly evenly spread across the categories of responses. The comments provided showed that attractions consider that when public relations activity works well it can be very beneficial:

'Coverage in local papers is always great publicity, we find we have less response when paid for adverts are taken out, as the free editorial with it is usually minimal'; 'BBC and local media coverage was essential in marketing'; 'it's free! and it goes out to a huge audience'; 'we do get significant exposure on TV Radio etc.'.

Only 20 attractions provided a response to ‘other’ in this section (Table 5.18), and a review of the comments helps explain that whilst these are important activities for some, perhaps the smaller attractions believe that compared with the higher ranking promotional activities such as leaflets and website, that these are not so important to them. Comments included: *‘Exhibitions/Trade Fairs’; ‘activities arranged by the Friends and taking part in events such as Open Doors’; ‘blogs’; ‘school's educational programme’; ‘we do take stands and exhibits to exhibitions around the country’; ‘Trip advisor’.*

Table 5.14: Marketing activity: other

Ranking	Replies	%
1	4	20%
2	1	5%
3	0	0%
4	1	5%
5	0	0%
6	0	0%
7	0	0%
8	1	5%
9	3	15%
10	10	50%
Total	20	

5.3.2 Welsh visitor attractions and the visitor experience

Table 5.15: The main reason for visiting the attraction

To see something different:		48
Entertain the children:		39
Educational:		47
Good day out:		39
Saw the road signs:		19
Came with friends or family:		42
Heritage or culture:		57
Been before:		49
Other *(please specify)*:		15

Although requested to 'tick one' it was clear that most respondents actually ticked all those that they believed applied, thus providing the high number of responses. The responses provided in 'other' included '*all of the above'* given by two respondents, and confirmation of some the main points such as 'been before', as well as points that may be specific to individual attractions:

- Because they're interested in the history we display here
- Fantastic scenery, steam trains, nostalgia
- Interest in gardens
- It's free, also accidental visits
- Restaurant has a good reputation, plus lots of local interest
- Special events
- Targeted groups
- Wartime heritage

One interesting point that was provided was '*it's free, also accidental visits'* perhaps suggesting that visitors come on a whim, presumably after seeing the road signs.

Table 5.16: The reason given by visitors for going to the attraction

To see something different:	9	26%
Entertain the children:	1	3%
Educational:	3	9%
Good day out:	4	12%
Saw the road signs:	2	6%
Came with friends or family:	0	0
Heritage or culture:	11	32%
Been before:	4	13%
Total	34	

There were 34 responses to this question, and it is worth emphasising that these are the comments from the attraction operators. They compare well with information from external sources such as the data on trends to attractions in 2013 (Welsh Government, 2013 p21) which states that the main reason given by day visitors for taking a day trip to/in Wales was for 'visiting historical sites/specific attractions/sightseeing' (41%).

Whilst most of the responses to this survey appear to be straightforward and linked to the nature or type of a particular attraction, some additional comments were provided which gave additional insight into the operators' perceived understanding of visitor motivation. '*I took the "select all* *that apply" rather than the "Tick one" instruction above. Difficult to identify just one main reason due to the wide range of visitors and the variety within our offer'* would seem a reasonable statement at first, but especially for larger attractions, it would surely help with planning if they had a clearer picture of the main motivating factor that encourages their visitors to come. Others were more focused: '*It depends on when they visit. For events, most often visitors cite the family activities and fun for the children being their reason for visiting. During the week or on regular weekends, they are just as likely to mention heritage/ culture, or that they're bringing friends and family to visit, or they are regular visitors who come often'*. This response again illustrates the multi-faceted appeal of larger attractions and the way that events can influence the visitor patterns and demographics. Several responses mentioned that they would like to have ticked more than one box and this is reflected in comments such as *'Saw the road signs & been before & word of mouth and most recently TripAdvisor' (all the same comment).* There were also some additional points such as '*new exhibitions attract their attention and lead to repeat visits'* which shows an understanding of the visitor motivation for specific things.

Following the answers to the previous question, attraction representatives were then asked how they would describe the specific experience that they are aiming to provide for visitors to the attraction. This question allowed attraction operators to express their own opinions of what they were providing for visitors. There was a range of replies from 62 different attractions, but several clear themes emerged, with many using the words 'heritage', 'education' or 'good day out' in their replies, as shown in the following table.

Table 5.17: The specific experience provided for visitors to the attraction

Specific word used or theme		
Heritage	25	39%
Unique feature or experience	12	19%
Good day out	11	17%
Education	9	14%
Family Orientated (and entertainment)	3	5%
Culture	2	3%
Warm welcome	2	3%
Total	64	

There was overlap between some of the categories, but the majority of attraction operators (39%) thought that the main experience that they were providing for visitors was related to 'heritage', whilst a good or great 'day out' also scored highly with 17% of replies. The next category mentioned was 'education' (14%), whilst 'family orientated' or 'entertainment' was only included by 5%. 'Culture' and 'warm welcome' were the lowest number of reasons provided, totalling 2% each. The words highlighted in the following quotes refer to the category that they have been placed in. The comments provided ranged from '*a quality **day out** and a taste of our heritage'* and '*a step back in time',* to '*a safe, clean fun and **educational** day out for the family*'. There was obviously overlap in some, with two obvious categories being quoted, in which case the first one mentioned was chosen. Some kept their replies simple, with one word answers such as 'education' or 'heritage', whilst others included 'to educate and entertain', and there were more complicated responses where attractions were obviously keen to blow their own trumpet by giving comments such as '*local **history** and way of life portrayed, attractive to families and children, interactive displays, recently reopened after total revamp'*, whilst others appeared more like missions statements '*We aim to provide a **family** friendly, accessible to all, all year round, all weather experience, so that people can learn about history'*. This type of theme was continued with '*to **educate** and entertain'*, and '*we aim to provide a welcoming, engaging and interesting visitor **experience** - for all ages, abilities and backgrounds'*. In some respects statements such as this last one could be considered fairly generic in that they could apply to a number of different attractions and there is no clue in the statement as to the specific nature of the place, site, buildings or staff. Others were more specific such as '*a great **day out** with friendly staff - steam, scenery and Snowdonia'*, whilst some were also clearly proud of their Welsh heritage '*convey the culture and **heritage** of Wales in an interesting and informative manner*', and '*we aim to provide a warm Welsh welcome to all visitors, assisting them in their visits to the area, along with giving a museum/gallery **experience'***.

Table 5.18: A difference between the experience offered (Q7+11) and the reasons provided by visitors for going to the attraction (Q10)

Yes:		39	48%
No:		42	52%
	Total	81	

This was a key question in the survey, aiming to elicit any specific responses from attraction operators as to whether or not they think that visitors have a different expectation or experience at the attraction than that which is planned by the operators. The result shows that operators think there is a significant difference between what is offered and the reasons given for visiting. This is discussed in more detail in Chapter 5.

Table 5.19: Source of information from visitors about their experience at the attraction

Visitor comments book:		58	73%
Informal feedback to staff:		65	82%
Mystery shopper:		19	2%
TripAdvisor comments:		54	68%
VAQAS scheme:		42	53%
Other *(please specify)*:		28	35%

Again, with this question, respondents had ticked all that apply, yet the responses still give a clear indication of the importance of various methods. A high number (82%) said that they got feedback via comments to staff, but during the interviews this was explored further and there was rarely any formal mechanism for collecting or collating this data. It would appear that whilst attractions staff do speak to visitors and get opinions and comments, this should only really be considered anecdotal evidence and perhaps does not really form the basis for formal management planning. The comments received in 'other' related to annual visitor surveys, feedback forms and also feedback from Facebook, which some found useful. The use of new technology has also been adapted by some – '*we have installed an I-Pad in the Interpretation Centre to capture feedback from visitors. This is in addition to Visitor Comments Forms'*.

Table 5.20: Additional offers to visitors that may add value to their visit

Yes:		61	75%
No:		20	25%
	Total	81	

A large number of attractions had offered something additional to visitors, with events being the most popular, sometimes at an additional cost but many included in the entrance charge. Many of these were linked to specific themes such as behind the scenes tours or Halloween, and also school holidays which have become the norm in many places. *'During school holidays we often have extra activities available'; 'craft sessions for mothers and toddlers during school holidays'; 'quizzes, treasure hunts, face painting'.* Drama re-enactment and living history groups are also mentioned, as well as temporary exhibitions.

In Question 15, attraction operators were asked if they use examples of the visitor experience in their promotional material e.g. pictures of visitors at the attraction or quotes from visitors. The responses and comments provided were relatively straightforward, with positive comments being used from sources such as visitors' book and Facebook. Most confirmed that they use photos of visitors (after seeking permission) '*pictures of visitors in various settings on site. Images of what they can expect when they visit'*. Interestingly, one attraction replied that '*we do not do this on our printed promotional leaflets, but regularly on Facebook / Twitter and website'*. The strength of positive comments from other visitors in helping to endorse an attraction can help to take the uncertainty away from those who have not visited before – '*we use visitors' comments in our write up as they are the customers views and not our own'*.

Question 16 asked if there were things that visitors sometimes ask for that are not currently provide at the attraction. Many of the responses provided related to on-site facilities, with **café** or more catering being clearly the most quoted. Other requests included better access, children's toys/activities, children's play area, guided tours, foreign language commentaries, more toilets and more parking. Two responses provided were '*not really'* and '*not that I can think of'*.

Table 5.21: The biggest challenges facing the attraction in the next 5 years

Competition from other attractions:		23%
Lack of funding:		60%
Changes in leisure patterns:		21%
Other *(please specify)*:		36%

Funding clearly seemed to be the biggest issue, but there were a range of other concerns provided in the 'other' section, which helped provide additional insight into the issues faced by attractions. The availability of volunteers was noted as a point of concern by several, as was competition from other attractions and places to visit. The general economic downturn was mentioned, '*recession* *biting harder', 'less money in people's pockets',* with pressure on attractions in the public and third sector facing uncertain futures from continuing cutbacks in local authority budgets and reduced funding for arts and cultural programmes from the Welsh Government and other sources. *'Local Authority reductions in spending are likely to have negative affect on heritage, tourism and cultural services'.* The unpredictability of the weather was mentioned by two respondents as being a factor when looking ahead to the next five years, whilst '*getting visitors to this area'* and *'Wales needs better promoting',* were also comments that showed that there is still a feeling that more needs to be done in getting visitors to certain parts of the country.

Table 5.22: Planned developments at the attraction that may change the visitor experience

Yes:		61	75%
No:		7	9%
Not at present:		13	16%
	Total	81	

The majority of attractions (75%) were planning developments or improvements that may influence or change the visitor experience. Interestingly enough, whilst the most quoted thing that visitors had asked for was a café or more catering, when describing the developments being planned for the attractions, the things mentioned most were to do with additional play facilities for children: *'improve our toddler area', 'children's playground', 'playground at the visitor centre'*, were just a few of these comments. Improvements to the displays or extra exhibits, or longer opening hours were also cited, but new catering facilities or café were not mentioned at all.

5.3.3 Management and marketing elements

Table 5.23: Operators' educational qualifications in tourism, business or marketing

Yes:		15	21%
No:		57	79%
	Total	72	

The majority of attraction operators do not appear to have any formal qualifications in a related field that may be useful to them in the management operational side of running an attraction.

The results for those that do have qualifications (Table 5.28) were spread across the areas of business, tourism, marketing and professional qualifications from the Chartered Institute of Marketing. The responses in the 'other' category were: '*my daughter has a tourism degree and a masters in heritage'* and '*World Host Training Visit Wales Diploma'*.

Table 5.24: Range of educational qualifications in tourism, business or marketing

Degree in Tourism or Hospitality	2
Degree in Marketing	4
Degree in Business or Management	2
CIM qualification	2
Postgraduate	2 (one MBA, One PGdip in Heritage Management
HND Business	1
Other	2
Total	15

Discussions with the smaller attraction operators chosen for interviews showed that many had chosen to run or get involved in their attractions as a lifestyle choice and they did not have any specific business skills or experience before taking over or starting their attraction.

Table 5.25: Development of marketing experience

Seminars:		26%
Short course:		21%
Advice from friends or colleagues:		39%
Online searches:		24%
Trial and error:		53%
Advice from consultants:		24%
Other *(please specify)*:		14%

The way that most attraction operators have developed their marketing expertise is through trial and error, or advice from friends and colleagues. 'Experience' is the word used most often in the few comments supplied under 'other', although one comment was *'by considering what information visitors need and looking at the best way to describe it and get the message across'* which was quite insightful.

The topic of Tables 5.31 and 5.32 were included to test the respondents' actual knowledge of marketing terms and practices. Whilst many said that they understood the term marketing mix (44%), well-over half (56%) were not sure or did not know what it meant.

Table 5.26: Understanding of the marketing mix and how it applies to the attraction

Yes:		32	44%
No:		21	30%
Not sure:		19	26%
	Total	72	

Table 5.27: Understanding of STP (segmentation, targeting and positioning) and how it applies to the attraction

Yes:		20	29%
No:		39	54%
Not sure:		13	17%
	Total	72	

This was a more detailed marketing question and was intended to relate to the operators' understanding of knowing their main target market and also how they compare with other attractions i.e. their positioning. 71% were not sure or did not know what the terms meant, which might suggest that they were unsure of the terminology, although they may still perhaps have an understanding of the marketing issues involved, as clearly shown by some of the comments included below. Following up on the lack of formal qualifications amongst operators in a relevant discipline may mean that this is an area that could be targeted for support by the Welsh Government.

Those that had answered 'Yes' or 'Not sure', were asked to describe how you think it applies. There were some quite detailed responses included here, which perhaps shows that some operators clearly understand the issues involved: '*ascertaining which aspects of what we offer can be targeted to specific groups and identifying unique selling points. Also, considering how different visitor groups can be targeted and encouraged to visit - and then providing them with an engaging and enjoyable visitor experience. Considering how we 'compare' with similar sites and attractions'*. However, that does not mean that the majority of them are clear about the relevant marketing models and theories that may help them in their work of attracting more visitors or understanding their market. A further comment was '*we know our product and who our target markets are and how we intend to market the different sectors and continue to move with the ever-changing technology',* but would the majority of attractions be able to claim something like this, especially when the main way of developing expertise in marketing activity according to Question 20 was by trial and error.

Table 5.28: Identification of primary market segments

Yes:		41	58%
No:		22	30%
Not sure:		10	13%
	Total	73	

30% have not identified or are not sure about their primary market segment – this should be one of the basic elements of marketing i.e. knowing your customer. It would appear that there are a significant number of attractions that still lack the basic marketing skills necessary for informed decision-making, leading to effective management.

For those that answered 'Yes' or 'Not sure', the majority of replies mentioned '*tourists'* or '*families'*, '*day trip visitors'* or '*schools'*. Other comments included '*everybody'*, '*everyone who has an interest in the subject'*, and '*family market for school holiday period, adults with no children outside of these times'*. It is clear that in general those attractions that understand the need to identify their visitor segments, have managed to do this successfully.

Table 5.29: Attractions in the VAQAS scheme

Yes:		42	59%
No:		26	37%
Previously but not now:		3	4%
	Total	72	

The majority of comments provided for this question were '*don't know what it is'* or '*not relevant'*. Other comments provided are self-explanatory such as: *I don't think it convinces people to come. I've never been encouraged to go by its ratings'*; '*It is too expensive & people come* *because they like the way we are at present'* – which might suggest that somehow the scheme would change the attraction for the worse! '*It's such a small attraction that the volunteers don't recognise the need'*

Table 5.30 Extent of marketing expertise

Strongly agree:		8	11%
Agree:		37	53%
Disagree:		22	31%
Strongly disagree:		3	4%
	Total	70	

Whilst the majority of respondents (64%) felt that they had sufficient marketing expertise, a significant number (35%) stated that they did not have the expertise necessary to get visitors to the attraction. This relates to the other parts of the survey such as Question 20 (Table 5.29) where they said that 'trial and error' was the main way of finding out what works in terms of promotional activity, and some do not know who their main types of visitor are.

Table 5.31 Understanding of visitors' motivation for coming to the attraction

Strongly agree:		10	14%
Agree:		48	69%
Disagree:		12	17%
Strongly disagree:		0	0
		70	

A clear understanding of visitor motivations (83%) is claimed here, yet in the earlier part of the survey, 43% said that they thought there was sometimes a difference between the experience that they are trying to offer (Questions 7+11; Tables 5.22 and 5.42) and the reasons that visitors may give for visiting (Question 10; Table 5.35). This suggests that for some attraction operators, whilst they may like to think that they understand visitor motivation, once they are tested further on this point, they admit that there may be a lack of knowledge and understanding, and 17% express uncertainty in understanding visitor motivation.

Table 5.32 Visitor expectations

Strongly agree:		27	39%
Agree:		36	52%
Disagree:		5	7%
Strongly disagree:		1	2%
		69	

There is a clear message here that 91% of respondents believe that visitors usually get more than they expected from their visit, yet this is not true in all cases, with 9% disagreeing with the statement. This compares with 25% who said in response to Question 14 (Table 5.24) that they did not offer anything unexpected or extra to add value to the visit. This again suggests that respondents often like to think that they operate in a certain way, and understand their visitors, yet when tested the reality is found to be slightly different.

Table 5.33: Measuring the quality of the visitor experience

Strongly agree:		9	12%
Agree:		6	8%
Disagree:		19	26%
Strongly disagree:		39	54%
	Total	73	

This question was worded in a different way to check that respondents were still concentrating on giving the right answer for them, and also to test their response to a negative. The majority (80%) disagreed with the statement, showing that they actually believe it is important to measure the quality of the visitor experience. A significant number (20%) stated that it measuring the quality of the visitor experience was not important. The response to this question and the following ones were discussed further in the qualitative interviews to gain more depth and greater understanding of what was actually happening.

Table 5.34: Visitor comments book

Strongly agree:		40	58%
Agree:		22	32%
Disagree:		5	7%
Strongly disagree:		2	3%
	Total	69	

The vast majority of participants (90%) claimed to regularly read what's written in visitor comments book, and this was confirmed by the responses to the interviews. What was perhaps surprising was the 10% who state that they did not regularly read the visitor comments book, although this could be explained by individual interpretation of what is meant by 'regularly'. Interview answers ranged from 'daily consultation' to 'weekly' or 'monthly', so perhaps it is not that the 10% are not consulting the visitor comments book, but that they are doing it less frequently than other attractions.

Table 5.35 Benchmarking attractions

Strongly agree:		18	26%
Agree:		29	42%
Disagree:		16	23%
Strongly disagree:		6	9%
	Total	69	

Whilst the majority think it important to have a comparative analysis of performance, surprisingly 31% disagreed with this. In the follow-up interviews, the main reason given for this was that each attraction can be unique and that simple or straightforward comparisons in terms of visitor numbers, for example, are not that relevant. Thus, the question posed in Chapter 2, how should 'performance' be measured? If it was in terms of visitor numbers alone, this can be misleading for other issues of quality, repeat visits, profitability and so on. Yet league tables of the 'top ten most visited' are still produced each year by Visit Wales based on their annual survey of attractions.

Table 5.36 Why visitors come to the attraction

Strongly agree:		0	0
Agree:		23	32%
Disagree:		30	42%
Strongly disagree:		18	25%
	Total	71	

The majority of attractions disagreed with this statement, showing that they do have an understanding of why visitors come, but once again a significant 32% state that they are not always sure of the motivation of visitors. Tables 5.22 and 5.35 provide operators' responses as to why they think visitors come, but it is clear that there is still some uncertainty in fully understanding visitor motivation.

Table 5.37 The visitor experience and promotional material

Strongly agree:		12	18%
Agree:		37	56%
Disagree:		17	26%
Strongly disagree:		0	0
	Total	66	

A relatively high number (26%) suggested that they do not use examples of the visitor experience in promotional literature, yet the response from the interviews show that they may be using them elsewhere such as Facebook, and the printed promotional material contains images and details of the attraction or collection itself i.e. a greater focus on the 'product' itself.

Table 5.38 Visitor expectations and actual experience

Strongly agree:		5	7%
Agree:		46	66%
Disagree:		17	24%
Strongly disagree:		2	3%
	Total	70	

This question was intended to 'mirror' Question 12 (Table 5.22) in order to provide a check on responses to the question regarding any difference between visitor expectations and actual experience. Whilst the response to Question 12 was 47% agreeing that there was a gap, for this question the result was 73% agreeing. This was again followed up in the qualitative interviews in order to get a greater insight into the issue.

Table 5.39 Planned changes to the attraction within the next 3 years

Strongly agree:		24	33%
Agree:		24	33%
Disagree:		18	25%
Strongly disagree:		6	8%

		72	

Most attractions (66%) stated that development work or improvements were planned, which was almost comparable to the 76% saying the same thing in response to Question18. The surprising figure was that 33% are not planning any major changes or improvements in the next five years.

Table 5.40 The future of the attraction

Strongly agree:		7	10%
Agree:		23	33%
Disagree:		25	36%
Strongly disagree:		15	21%
	Total	70	

The majority of attractions (57%) believed that the future was unclear at the moment, with further explanation provided in the qualitative survey suggesting that much of this uncertainty was in regard to general economic conditions, with the continuing cutbacks in local authority budgets a particular cause for concern.

Table 5.41 Compulsory inspection scheme for attractions

Strongly agree:		7	10%
Agree:		28	41%
Disagree:		22	32%
Strongly disagree:		12	17%
	Total	67	

This question was included as part of the theme to get feedback on how the quality of attractions or the visitor experience could be assessed. In response to the query about compulsory inspection schemes, there was an almost even split of opinion, although the preference for a compulsory scheme was slightly stronger (51%). The current visitor attraction quality assurance scheme (VAQAS) provided in England and Wales is voluntary. The scheme has operated in Wales since 2003 (Vaqas Cymru) under license from England, and whilst there have been attempts to give the scheme ‘teeth’ (an attempt to prevent non-Vaqas attractions from displaying promotional material in TICs was successfully challenged in 2010), the scheme remains largely voluntary and attractions do not have to participate. Some attractions have dipped in and out of the scheme, and the wider profile of the scheme still remains fairly low, with some respondents clearly lacking knowledge of it (see Question 25.p Table 5.49)

Table 5.42 Opinions regarding a grading scheme for attractions

Strongly agree:		4	6%
Agree:		31	44%
Disagree:		29	41%
Strongly disagree:		6	9%
	Total	70	

With the majority of attractions supporting a compulsory inspection scheme as shown by the responses to Question 25.n (Table 5.47), it was interesting that 50% disagreed with the suggestion for a grading scheme with different levels of award. Opinion was evenly split on this point, but comparing the two questions, it would suggest that there was perhaps more support for a straightforward pass/fail inspection scheme rather than different levels of grading. This may be a very topical point since in 2014 Vaqas Cymru were planning the introduction of a variety of awards to recognize achievement in different categories according to the assessment criteria used during the Vaqas visit. The score sheets completed during each visit were made available to individual attractions for the first time in 2014, so that they could see the percentage score that they had achieved in each category and the overall score. These remain confidential to the individual attractions at the moment, but it will be interesting to see how this will develop once awards are introduced and attractions will surely be seeking to find out how their score compares with that of other attractions.

Table 5.43. VAQAS and feedback

Strongly agree:		14	19%
Agree:		33	46%
Disagree:		17	24%
Strongly disagree:		8	11%
	Total	72	

One of the original key aims of the Vaqas scheme (Chapter 2) was to provide feedback from assessors trained to provide objective and constructive comments based on the visitor ‘journey’ at each attraction. In this way, it could be used as one measure of feedback on facilities. The acceptance of the scheme and indeed the take up has developed and increased in Wales since its launch in 2003, with over 250 attractions participating in 2016. Yet the awareness may still be low in some areas, with comments provided such as: '*what is VAQAS'*, and '*don't know this scheme'*

Table 5.44 Compulsory membership of VAQAS

Strongly agree:		10	14%
Agree:		26	37%
Disagree:		26	37%
Strongly disagree:		9	12%
	Total	71	

The response to this question was also evenly divided with half of respondents stating that all attractions should be in Vaqas and half disagreeing.

Table 5.45 Visit Wales support for attractions

Strongly agree:		3	4%
Agree:		34	50%
Disagree:		20	29%
Strongly disagree:		11	16%
	Total	68	

The responses to this question show that the majority of attractions (54%) believe that they are well supported by Visit Wales, but this could refer to a variety of factors such as marketing support and advice, as well as funding.

Table 5.46 Funding for improvements to the attraction

Strongly agree:		23	32%
Agree:		30	42%
Disagree:		16	23%
Strongly disagree:		2	3%
		71	

In addition to commercial sources of funding, Visit Wales offer financial support for attractions through the Tourism Investment Scheme. However, the majority of attractions (74%) believe that it is still difficult to obtain the money for necessary for improvements.

Table 5.47 Marketing expenditure

0-5%:		22	38%
6-10%:		19	33%
11-15%:		4	7%
16-20%:		5	9%
21-30%:		2	3%
over 30%:		0	0%
Other *(please specify)*:		6	10%
	Total	58	

Where responses were provided from 58 of the total 82 survey respondents, it was notable that spend on marketing represented a low percentage of attraction turnover. There were six replies in ‘other’ (representing 10% of the question respondents) and responses were all of a similar type, suggesting marketing to occur as a lesser planned area of strategic activity: *"difficult to calculate against the attractions turnover as we're not a profit-making institution"; "I have no idea"; "unknown"; "unsure";* and *"varies”*. Further analysis showed that these replies were all from smaller attractions.

5.3.4 Final comments about the marketing of attractions by operators in the Phase 1 sample

This question allowed for attraction operators to expand on any particular themes or issues relating to marketing that may have not been fully explained in any previous comments. The range of replies reflected the size and nature of different attractions, with some obviously having dedicated marketing staff to support them, and others relying on the good will of volunteers to remain open, and not having any specific marketing expertise. ‘*Many different forms of marketing are equally important but for different reasons and at different times during the customers' 'journey' to us’* was a comment from one attraction that shows an understanding of the various marketing issues, including mention of the visitors’ journey. Yet others put ‘*could always do* *more',* and *'it is difficult when you work, and you help voluntary - you never have enough time'.* Wider changes in marketing communications that affect all businesses and organisations, not just visitor attractions are reflected in comments such as '*social media and the internet are making significant differences to how we approach things'*, showing that whatever the size or nature of the site, there are simple, cost effective ways to communicate with visitors. Finally, the need for training and advice in the sector is also clearly shown by comments such as '*keen to learn more about marketing and would attend training'* and '*marketing is an element where we lack expertise, capacity and funding'.*

5.3.5 Phase 2: Semi-structured interview results for marketing and visitor experience

The following section draws on the main content of the transcripts from the recorded interviews as set out in each of the parts of the script for the semi-structured interviews. The transcripts (Appendix 4) have been highlighted with the open coding for the initial themes, as explained in Chapter 4, and shown in Table 5.55.

Table 5.48 Analytical themes

1.The main promotional or marketing activities
2. Sufficient expertise to work on marketing activities
3. Visitors' motivation or reason for coming to your attraction
4. Planning the visitor experience
5. Incorporating the visitor experience into promotional or marketing activities
6. Measuring the quality of visitor experience
7. Any gap between why visitors come – their expectations, and the actual visitor experience that they may get; other managerial issues

(Source: adapted from Blum and Fallon, 2000; Chen and Tsai, 2007)

Table 5.49 Applying the categorisation matrix

Open code	Analytical theme	Properties	Participants' words/comments and occurrence
Marketing related	1	to get visitors – promotional activities	Leaflets (16); Facebook (9); TripAdvisor (9); website (6); families with young children (6); word of mouth (5); distribution (3); advertising (3); just visiting the area (3); Twitter (2) press releases (2); no advertising (2); target older people (2); social media (3); joint marketing (2); road signs (2);
Visitor motivation	3	Reasons for visiting	Nice day out (6); see something different (4); heritage (3); interest in horticulture (2); museum collection (2); get out of the rain (2); farm animals (2)

Visitor experience	4	What do visitors do and see	Activities/events (8); Gardens (2); historic remains (2); interpretation (2); shop (2); café (2); positive interaction with staff (1);
Measuring visitor experience	6	Response mechanisms	Visitor comments book (10); TripAdvisor monitored (6); comment cards (4); Vaqas (2) none – unmanned site (1);
Experiential marketing	5	Type of attraction and nature of the 'product'	Events (5); interpretation (3); theming/special feature (2); need more 'Welsh' sense of place (1);
The marketing ability of attraction operators	2	Formal training; ad hoc courses; self-taught	Limited experience (4); lack of time (3); some marketing training (3);
Management realities	7	Ownership of attraction; free/charging; other operational aspects	Competition from other attractions (5); development plans (2);

(Source: The author, 2016)

As part of the directed, deductive analysis, a categorisation matrix was developed (Table 5.56) and the data checked to see if it still confirms to the allocated categories. The occurrence of key words used by respondents is shown, and this was used in the checking identified in Tables 5.55 and 5.56. The following more detailed analysis takes account of these results and also uses direct quotes from the respondents to highlight the key points emerging from the interviews.

5.3.6 The main promotional or marketing activities

Leaflets and website are the main methods of communication used by attractions to communicate with visitors: *we print and distribute 100,000 promotional leaflets each year (B);* Although the significant costs of print and especially distribution can be a challenge for some: *we do have a leaflet and try and get it distributed but as a small attraction we have very limited funds for marketing and advertising (A); marketing wise, we have a very limited budget (E); leaflets is our main activity, it's what everyone does in this area (F); leaflets and website are the main marketing things we do (I); leaflets are still the most important especially for those visitors in the region, and the website is useful for visitors before they come (K); we still firmly believe that there's a place for paper leaflets, you can't use technology for everything (L); we keep the website up to date with news and what's happening (M);*

Other methods of communication are used effectively by some: *public relations activity, press releases and journalist tours are a big feature for us in getting good media coverage (B); we do* *try and do press releases and stories, especially about any events going on, but it's usually for locals (H);*

Some attractions still appear to be unsure as to their most effective promotional activity, or exactly how visitors hear about them, with word of mouth mentioned as the primary source of information by many: *word of mouth, people hearing about the museum- we don't really do advertising because when we did a survey we found that it didn't really work for us. we have a leaflet that people can take with them. It's not for distribution but they can take it home and show their friends (C); I guess the main method is word of mouth really (D); word of mouth as well (E);*

Another point of interest emerging from the comments was that only (F) a large, established attraction in North Wales mentioned the benefits they got from joint marketing with other attractions: *we are part of two major attraction consortia, which works well for us*. This seems to work well in North Wales with Ten Top Attractions and the Attractions of Snowdonia being examples of marketing consortia that cross local authority and marketing area borders. There is no equivalent in West Wales, and in the South East, the South East Wales Attractions Partnership has struggled to continue for several years and in 2014 appeared to be on the verge of ending.

Finally, it would appear that whilst some attractions still produce large quantities of promotional leaflets, their importance in getting new visitors has been overtaken by websites and use of social media: *we're coming to the conclusion that digital methods are just as good as the traditional ones, and a lot cheaper (N),* highlighting the growth in importance of the digital presence - although not everyone seems able to do this*: we don't use Facebook or twitter. The main reason is that it would be just another job to do (O).*

5.3.7 Sufficient expertise to work on marketing activities

Whilst the larger attractions benefitted from trained or qualified marketing specialists: *yes I have marketing training and my role is specifically related to this (B); we have a small marketing team that get involved in everything (M)*; the picture at many attractions was variable, with some of the smaller ones obviously struggling to undertake promotional activity, l*et al*one understand or identify their target markets or core audience: *we're all volunteers and our main effort is on getting the building open to the public(O); we don't have any marketing expertise (D); It's difficult to say who our main type of visitors are especially with the large range of diverse events* *we have on, but I guess it's families (E); we don't have any marketing training (P).* Other changes have also had an impact especially in the attractions linked to local authorities: *we don't have a marketing officer but can work with the appropriate department in the council. Sometimes it's a case of trial and error and see what works and this is what we're finding with Facebook (N); we did have a marketing officer but there have been several staff changes and we now work more closely with the council's marketing department, so we tend to rely more on them for help and guidance (H).*

Some attractions seem satisfied to carry on as they are: *we use the marketing experience of the staff here that's been built up over the years, but this has changed with the use of more digital marketing (F); the attraction has been open for some years now so we know what works and what doesn't in marketing (I),* or perhaps they are forced to work in this way: *I have a lot of experience of managing and marketing the attraction that's been developed over the years and I can apply that, but sometimes it's still a matter of trial and error, and of course it depends on the budget available (J); I suppose it's the experience that we've built up over the years so we know what works (K); we don't have any marketing training but we know you need to do leaflets and website and we try and do some advertising (L)*

Several mentioned the benefits of copy-cat marketing, i.e. seeing what seems to work at other attractions and using that: *we don't have any specific marketing training, but as a museum professional, I do try and keep up to date with what's happening at other similar museums to see what's successful (G);* Some attractions see a role for Visit Wales in leading improvements in the area of training and advice on marketing: *Visit Wales could do more to help attractions and we shall wait to see what news comes in the New Year on this (B);* but this help would have to be relevant and targeted for the smaller attractions: *further help would be good but I'm not sure if we'd have the time to be able to leave the attraction to go to anything if it was held a long way away (A); some workshops or other free advice would be useful (D); some help and guidance on this would be great especially if it was free (L); It would be good to have some advice on marketing and see the bigger picture from other attractions (N); help would be good but we can't afford advertising and also it would be difficult to leave the farm and attraction to go anywhere else (P)*

5.3.8 Visitors' motivation or reason for coming to your attraction

This was another question included to determine the attraction operators' understanding of their visitors, and the responses were mixed, with some clearly knowing visitor motivation, especially if the main theme of the attraction is obvious: *people come to see the gardens, but that's what we have here and that's what people hear about (A).* For other attractions, however, it's a mix of factors, some of which may be quite general: *a lot come for a pleasant day out in nice surroundings (B); I think they visit because they find it a picturesque ruin (D); they come for nostalgia (L)*; *we think that people come to see something about the heritage of the area and also there are a lot of artefacts and memorabilia that are interesting to look at (O).*

The importance of events and activities for children were mentioned by several, but in some respects these could be held anywhere*: there's a mixture of family events (E); we do target those people who come to the town and try and get them to come here, and show that it's a museum with lots of interesting local heritage but also events and hands on activities for younger visitors (G); visitors come mostly for the events – we run 136 events through the year and all these are included in the admission charge at no additional cost (J); activities for children and themed events (K)*. For one attraction, there was even some uncertainty: *we're not sure why people come – whether it's to see the hill fort or the farm (P),* whilst for others, visitor motivation was linked to other factors including retail: *Christmas time it's more local people coming to the shop for presents (K).*

5.3.9 Planning the visitor experience

This theme seemed to be more of a difficult issue for some attractions, and they tended to re-iterate reasons for visiting: *people come for the gardens (A);* or were fairly general in their response: *we know that visitors also want to see something new so we have to think about that in our planning and developments (M)*. Others show that they understand what's involved and are consciously shaping the experience: *we allow the gardeners extra time to talk to visitors and encourage them to do this since we know that the visitors really appreciate this and see it as an important part of their visit (A); we definitely think about why people visit and have a very busy diary of events throughout the year, and we constantly in our meetings discuss what's worked and what hasn't, and what we need to do to try and change things (E); we try to adapt to what* *we think visitors may need and that's what's been behind the recent developments here, so yes, it definitely impacts on our planning (F); we do incorporate the views of visitors in our planning for the year ahead (G).* Some attractions had a clear view: *if there's anything in particular that visitors say they want then we'll consider that in our plans (K)* although it may be worth emphasising that this attraction had a strong retail element to it, so they may have been referring to shop items. One attraction was quite clear in their response to shaping the visitor experience: *we don't do that, people can just visit the castle when it's open and enjoy it (D)* whilst another privately run established attraction also had an interesting response: *we don't really base any developments on this (I)*

5.3.10 Incorporating the visitor experience into promotional or marketing activities

The overall response to this theme was mostly generic in terms of including pictures of visitors at the attraction in promotional material or on the website, or including quotes from visitors:

> "*we use our own images of visitors at the museum to try and explain to people what they'll see when they get here"* (Interviewee E);
>
> *"obviously we'll use images of visitors at the attraction ... and other activities are something that feature strongly to show people what's here"* (Interviewee F);
>
> *"pictures of the different parts of the attraction, and especially the animals and events"* (Interviewee J);
>
> *"we try to show visitors doing things at the museum and also highlight the activities on social media, especially to local visitors"* (Interviewee G);
>
> *"*[We] *describe the different parts of the attraction and also use Facebook more and more for particular events"* (Interviewee N).

This also shows the way that social media is increasingly being used; any potential visitors to an attraction can quickly see what's on but also the comments of previous visitors via Facebook or TripAdvisor. It is still important for attractions to 'manage' this activity, which is a point that unfortunately some attractions appear to have still to discover: *we try to describe what we've got here but we haven't done a new leaflet because of the cost and we're not always sure that it would get to the right place (P).* The digital footprint of this particular attraction was very small, with only a few TripAdvisor comments and an undeveloped Facebook entry.

5.3.11. Measuring the quality of visitor experience

Nearly all attractions had a visitor comments book that they checked, although at least one did not: *we don't have any visitor comments book or anything else really (D)* but most of the time this is an un-manned attraction. Some had visitor feedback forms as well as other methods for obtaining feedback: *we have a visitor comments book that we monitor and also look at comments on TripAdvisor (A); we carry out our own surveys regularly (B); we have a comments book that I check weekly. We have a season pass with over 1000 season pass holders and we do an annual end of season questionnaire. This gives us really useful feedback from our most regular visitors, and we've been doing this for over 9 years, so it gives us very strong consistency for comparing how we're doing year on year (J); we take the visitor comments book as our best indication of visitors' views (N).* For smaller attractions, direct feedback from visitors can be obtained: *we don't have a visitor comments book but our numbers are quite low, and we get to speak to all our visitors so we hear about their visit directly (P),* but this could be formalised through a staff-visitor comments book to ensure that useful comments are captured effectively. Those in the VAQAS scheme did not automatically mention this as a method of assessing the visitor experience, which may suggest that there may still be some way to go in explaining to these attractions the additional benefits of the scheme. One did make this link: *no visitor comments book but have been in VAQAS scheme.* Others had not heard of the scheme which was also significant for a scheme that exists as a visitor quality benchmarking tool: *I'm not sure about what that is or if we've been in it (A)*

Most referred to TripAdvisor, and some responded to comments: *we use TripAdvisor as our main way of getting comments and feedback – it's the place that most people now go to and comment on how their day was, did they enjoy etc, and it's widely recognised by visitors as a source of comments (F); we get comments from Facebook but also TripAdvisor – I only discovered recently how to respond to comments on that, and now do more of that (L);* but the overall feeling was that it was generally too subjective, with polarisation of views: *we look at TripAdvisor but don't really take it too seriously (B); we are on TripAdvisor but I haven't actually seen any of the feedback on it (D); we do look at TripAdvisor but don't always reply as we don't have the time (H); we don't monitor TripAdvisor, although we may look at it from time to time, it's not really that relevant to us (I); we look at TripAdvisor but don't always respond – it can be a very* *subjective thing about minor points (M); some people put rave reviews but then others complain about minor things or others use it as a forum to complain about other things, so we tend not to take too much notice of it really (N)*

5.3.12. Any gap between why visitors come – their expectations, and the actual visitor experience that they may get

Most attractions were quite straightforward in their responses to this theme, usually mentioning a feature or aspect of the attraction that was better than visitors expected: *The grottos – visitors sometimes don't expect those and it's usually a surprise that they like and enjoy (A).* The reason for the gap was also clear: *it's difficult to explain these (grottos) to people before they come – you need to see them to fully appreciate them (A); visitors usually have a good idea of what to expect but some weren't aware of the changes here (F)*, this was for an attraction that has undergone changes and the promotional leaflets etc may still not accurately reflect this, but there were comments on TripAdvisor that also showed this gap in expectations. Other comments were more general: *we don't tend to over-market things and are honest, so I think visitors get a true picture of what's here (K); visitors have said that they are surprised at the overall quality of the attraction (B); generally, people are surprised at the quality of what they see (G)*, so were they expecting something less? Whilst some were also thinking of other factors: *what we get most of is that people didn't realise that we were here. It's probably due to the lack of money for marketing, but even people in the city say that they didn't know it was here (E)*. One attraction also stated that they were perhaps used to having a gap in expectations: *to be honest, we have so many visitors of all sorts of different types that some may like some things and others would like different things, so it's all a bit of a mixture really (I).* One attraction that had mixed reviews and comments on TripAdvisor, seemed unaware of this: *visitors are generally clear about what they'll see here (M).* Whilst a small museum with little promotional activity commented: *the building looks quite small from the outside, so everyone is surprised by the range of things inside (O)*

Finally, some comments from an attraction that obviously knows exactly what the position is: *I think there are two gaps in expectations, lets deal with the negative one first. We are a museum and market ourselves as that, but the museum side is a bit out-dated now and anyone who comes specifically for that, although it's not many, then they may be disappointed. So, there is a gap in expectations. But the very positive aspect is the service that visitors get from staff, this always* *comes out very highly in surveys and feedback, so they may not have been expecting such good service before they came (J);* and an attraction that is possibly an add-on to other activities: *they expect to pat donkeys or rabbits, or get close to the animals, which isn't possible on a working farm. They seem to expect something different to what we're advertising (P).* The review of promotional activity mentioned earlier for this attraction only confirms that there are confusing messages being put out about what visitors can expect, or not enough details of the attraction itself.

5.3.13 Concluding comments on Welsh visitor attraction operators' understanding of visitor experience and its use as a marketing tool

The results of the online survey (Phase 1) show that, on the whole, the respondents reflect a representative sample of attractions across Wales. There is a generally good balance between public, private and third sector i.e. those that are grant-aided and those that depend solely on admissions and other directly-generated income for their survival. The size of attractions responding ranged from very small, with under 5,000 visitors per annum, to the largest with over 450,000. The larger attractions tend to be of sufficient size to have dedicated marketing staff to work on promotional activities and trying to increase visitor numbers, whilst the smaller attractions are either supported by a larger organisation or are micro businesses with owner-operators fulfilling a lifestyle choice. Nearly half (44%) mention the importance of admissions revenue as being of great importance to them. A weakness of the survey construction is that more attention could have been given to identifying differences in retail activities (although catering and events were included) and this could perhaps be an area for further research activity.

In summarising and comparing the responses in Tables 5.9 to 5.18, it can be seen that the majority of attraction operators participating in the survey stated that their website was the most important marketing tool for them, with word-of-mouth and leaflets coming next, as shown in Table 5.54.

Table 5.50 Importance of specific marketing channels

Ranking 1-5 in scale of importance	%	Number
Website	93	64
Word-of-mouth	87	52
Leaflet	86	66
Facebook	62	38
Media coverage/public relations	56	39

66% of operators thought that paid for advertising was not important to them (points 6-10 in the ranking scale). Some attractions do not appear to undertake specific promotional activity (to attract new visitors), with no paid for advertising, promotional leaflets or any significant online presence. This raises the question of how they actually manage to get any visitors, which is possibly a combination of location, word of mouth (mentioned by most visitors as a primary reason for visiting) and sporadic bursts of marketing activity over a period of years. '*Saw the road signs'* is a response given by visitors as a reason for going to a particular attraction that has traditionally scored quite highly in the annual surveys of attractions by Visit Wales, but this does not really explain the visitor decision making process. It may be that, as mentioned by Stevens (2003) and Swarbrooke (2010) they already have some residual or subconscious knowledge or opinion of an attraction that is somehow forgotten when they were asked. This response is often hidden in contributions to surveys such as 'word of mouth' or 'heard about it before'. In considering the fact that in this PhD research this question was answered by the attraction operators themselves, it would be logical to assume that this may be based on a mixture of facts from their own visitor surveys, anecdotal evidence, or maybe even guesswork, as well as the operators own supposition as to why they think visitors come. This assumption was tested in the semi-structured interviews with attraction operators (Phase 2) and the results indicate that the larger attractions have evidence from their own visitor surveys whilst smaller attractions tend to assume that they have a good idea of visitors' motivations, or in the case of some, they are not really sure. "*In many cases, managers of smaller attractions often lack the marketing expertise to be able to adequately identify market segments and to create customer experience for them"* (McKercher *et al*, 2002, p 115).

Most tourism products are experiential in nature (Quadri-Felitti and Fiore, 2012) and visitor attractions are no exception to this. With regard to the experience that attraction operators believe that they are offering to visitors, 'heritage', 'education', and 'good day out' were amongst the most popular answers. However almost half of all respondents (48%) state that they think there is sometimes a difference between the experience that they are trying to offer, and the reasons given by visitors for going to that attraction (Question 12, Table 5.19). This was far higher than might have been anticipated before the survey was started. The detailed responses give some indication for the apparent difference, but perhaps also show that there is still come confusion and lack of knowledge or understanding of visitor needs and motivation - '*because our agendas are different to theirs'* was one response, whilst others were '*mismatch of expectations'* and '*lack of research by visitors!*' and '*they don't know what they will see'*. If these statements are taken at face value, it must surely raise all sorts of questions about the strategic direction and sustainability of the attractions, if visitors are expecting different things than that which the attraction is trying to achieve? '*Because they often find the castle accidentally and just come in to see what it is'* and '*they just pop in on chance especially if raining it is somewhere to go'; 'can be seen as an alternative to the beach',* are more comments of a similar type – in this case the attraction should be asking how they deal with this sort of motivation in the future. Remarks such as '*some people expect to see a stately home due to the facade of the building rather than a museum', 'some people visit for the shop and restaurant only'* and '*some use us as a public toilet'* perhaps indicate that there are weaknesses in the promotional messages and descriptions of the attraction as well as visitor management issues. In a competitive marketplace, it is essential for tourism businesses to offer an experience that stands out (Kim, 2014). Visitor attractions must therefore be clear about the experience offered or provided (Morrison, 2013).

Other responses show a greater understanding of the complicated nature of the issues involved: '*different visitor segments have different likes and needs - the preferred experience for one may interfere with the preferred experience for another'; 'families may have different agendas-adults/children have different expectations',* this shows that there may be conflicts within attractions at different times depending on the different needs of various different visitor types. Further explanation of this came during the interviews, with several operators citing the different needs of elderly groups compared with families with young children, or having to deal with school groups on educational visits. The facilities and infrastructure needed to cope with this, particularly at smaller attractions can cause conflicts, for example if rooms need to be set aside to deal with large groups, thus possibly giving other visitors less to see. For some attractions, it seems that visitors may have their own clear, preconceived ideas about what experiences they may get at an attraction, and then be pleasantly surprised that the reality is different – '*visitors don't always come expecting the educational side, and that isn't a reason they would give for visiting, but then they enjoy*. Whilst initially this would seem to be a positive comment, if there remains too much of a gap between visitors' expectations and reality, even if it is a positive feature, then this could be perceived as a management and marketing weakness since the product is being 'undersold'. The attraction operators' understanding and knowledge of marketing theories and models was mixed, with over half (54%) not knowing about topical marketing issues such as segmentation, targeting and positioning, and 30% saying that they had not identified their primary market segment. It may be that some were unfamiliar with the terms being used, but it highlights deficiencies in this area of expertise that have been identified by others (Blum and Fallon, 2001; Stevens, 2003).

Printed leaflets and website are still the main promotional or marketing activity used by the majority of attractions, but the use of social media is increasing. Many attractions appear to be taking advantage of the opportunities this method of communication offers to try and engage with their visitors. However, some attractions still seem to be unsure as to their most effective promotional activity, or exactly how visitors hear about them, with 'word of mouth' mentioned as the primary source of information by many. The role of joint marketing schemes and attraction consortia seem to be stronger in North Wales than other parts of Wales. Whilst the larger attractions appear to benefit from economies of scale and being able to employ marketing specialists, smaller attractions obviously suffer from having only a limited number of staff, or volunteers. They see a role for Visit Wales in leading improvements in training and advice for attraction operators, especially if relevant and specific to the needs of smaller operators.

In terms of understanding visitor motivation for going to their attractions, and the visitor experience, most had a clear view of this, but some were uncertain, reflecting the findings of the online questionnaire. Some are consciously managing the visitor experience at their attractions, whilst others seem content to simply let visitors take the attraction as it is. This surely shows a certain naivety, and an approach that is unlikely to be sustainable over a long period of time. In an ever-competitive market place, with more options and choices of things for visitors to see and do, it may result in a gradual decline in numbers (as in fact noted by one operator). On the matter of measuring the visitor experience, nearly all attractions have a visitor comments book as a minimum for obtaining some kind of feedback from those coming to their attraction. Some employ additional methods, including talking to visitors to get anecdotal feedback. However, as noted in Phase 1, the use of UGC reviews such as TripAdvisor to get feedback or interact with visitors, had mixed reviews from operators. There would appear to be little effort by attractions to develop the visitor experience through social media, and the feedback provided by visitors is not routinely used for marketing purposes (Yoo and Gretzel, 2016a). Whilst many attractions are using social media sites as a communication method, some are still doing this primarily as a promotional tool or one-way method of communication. Pictures, details of events and messages are 'posted' online, but some are ignoring comments or queries from visitors, even such basic ones as a request for opening times. Further analysis and discussion on this topic is included in the netnographic review (Phase 3) discussed in the next section.

5.4 Welsh visitor attraction operator engagement with online communications and feedback relating to consumer experience

Research objective 3 of this study is:

To examine online interactions between Welsh visitor attraction operators and their visitors through a critical analysis of the management of online comments and feedback.

The range and extent of Welsh visitor attraction operators' response to online comments was evident in the results of each of the three phases of research. Phase 1 responses included reference to websites, whether their own or third party.

Table 5.51: Marketing activity - attraction website

Ranking	Replies	%
1	24	35%
2	21	30%
3	12	17%
4	4	6%
5	3	4%
6	2	3%
7	1	2%
8	1	2%
9	1	2%
10	0	0%
Total	69	

Of the 69 attractions that responded to this question, 93% stated that having a website of their own was important (ranking 1-5). 9% did not think that having their own website was important (ranking 6-9). The comments for this question were: '*probably equally important*'; '*updated* *regularly'; 'Website well used'; 'we are about to commission an independent website'; 'We only have a small site which was set up about 6 months ago'; 'thinking about having one'; 'no website'*.

Opinions on the benefits of using third party websites (Table 5.11) appear to be more mixed as shown by the responses from 65 attractions. 53% thought they are important but the responses are distributed through all the categories, with only 5% giving the highest importance, and 2% the lowest.

Table 5.52: Marketing activity - third party website

Ranking	Replies	%
1	3	5%
2	7	11%
3	11	17%
4	8	12%
5	5	8%
6	9	14%
7	4	6%
8	10	15%
9	6	9%
10	2	3%
Total	65	

There was a range of observations provided: *'can be beneficial'; 'for day out reviews*, *and 'what to do' websites are the most useful, especially the Welsh tourism and local area related ones'; 'we are on many museum sites'; 'they show other things to do in the area'; 'TripAdvisor has been important and positive to date'; 'not sure of importance'*. The responses were more limited than expected and fairly straightforward in nature - the interviews with attraction operators provided greater extremes of opinion on the use of third party websites and social media in particular. Some believe sites such as TripAdvisor to be a useful barometer of visitors' feelings, whilst others think that the comments can be too subjective, with wide extremes of views.

Table 5.53: Marketing activity - Facebook

Ranking	Replies	%
1	10	16%
2	5	8%
3	5	8%
4	7	11%
5	11	18%
6	7	11%
7	12	19%
8	4	7%
9	1	2%
10	0	0%
Total	62	

62% of the 62 attractions who responded to this question believed that Facebook was important to them, with the scores fairly evenly distributed. Surprisingly, given the very positive comments in the qualitative interview responses, it is perhaps surprising that 39% of attractions did not see using Facebook as important. There were some quite positive responses that show how this communications tool is being used to get new and repeat visitors*: 'great for advertising to local supporters and promoting events'; 'great for keeping likers up to date with events, and news, including lots of images and details of special visits'; 'great for short term campaigns'; 'just started proving beneficial'*. There was however one interesting example of a negative comment: *'this may be totally erroneous. We have less than 1000 followers, but people tell me that they all pass messages on to their friends! As you can tell, I'm not convinced of its effectiveness'.*

Table 5.54: Marketing activity - Twitter

Ranking	Replies	%
1	5	9%
2	3	5%
3	4	7%
4	5	9%
5	6	10%
6	9	16%
7	3	5%
8	12	21%
9	8	14%
10	3	5%

Total	58	

The response to a question on Twitter did have different outcomes to that for Facebook. Whilst most attractions thought that Facebook was important to them, the reverse is true for Twitter, with 60% stating that it is not important (6-10).

There were very few comments in the section for Twitter, perhaps reflecting the fact that this is still a developing medium for attractions and visitor development, with more obvious results in terms of visitor engagement and success available via Facebook. This was confirmed in the interviews with attraction operators who expressed largely negative views about the success of using Twitter to boost visitor numbers. The only comments provided were: *'as above'* (i.e. relating to the comments on Facebook); *'own site'; 'same as Facebook - but good for reaching a broader network of businesses'*.

Table 5.55 TripAdvisor or websites comments about the attraction

Strongly agree:		36	52%
Agree:		17	25%
Disagree:		11	16%
Strongly disagree:		5	7%
	Total	69	

The responses to this question and the following one are considered to be closely linked and are commented on after Table 5.40.

Table 5.56 Responding to TripAdvisor or other comments about the attraction

Strongly agree:		17	25%
Agree:		20	29%
Disagree:		21	20%
Strongly disagree:		11	16%
		69	

The points to note about Table 5.39 and Table 5.40 are that whilst many operators will look at the comments on TripAdvisor (80%), only 54% regularly respond to those comments. A significant 23% do not read the comments regularly, and 36% do not respond to them.

Whilst most of those responding (85%) to the online survey see their own website as being very important, a significant number (9%) do not seem to appreciate the relevance and benefit of having a website (and presumably a strong online presence). Opinions about the use of social media site such as Facebook and Twitter are also mixed. Although there are some very positive responses describing the use of these online tools, there are also some that confirm that for a small group of attraction operators, they are still not convinced about the effectiveness of these methods of communication and interaction with their visitors. Whilst 84% will look at the reviews on TripAdvisor, only 54% regularly respond to the comments. 23% (almost a quarter) do not read the comments regularly, and 36% say that they do not respond to them at all. These figures are again confirmed by the interview results where some attraction operators expressed strong feelings about the polarization of comments on platforms such as TripAdvisor – they felt that it tends to get comments at the two extremes i.e. from those visitors who really liked their visit or from those who, for whatever reason, found something during their visit that they were unhappy with. It would appear that whilst there can be strong advantages and benefits to getting feedback in this way (speed of response, individual comments), and the ability to enter into a limited form of dialogue with the visitor by proving a response to the comments, a small but significant number of attractions are not engaging in the process.

5.4.1 Phase 2 results: Welsh visitor attraction operators' online activities

Prior to commencing the Phase 2 interviews, a scoping review was carried out of the promotional activity of each attraction selected, in order to gain a better understanding of their activities before speaking to the attraction operators. Appendix 3 summarises the initial, scoping analysis of each attraction's promotional activity and how it features the visitor experience. This was examined through a review of images and descriptions used on the attraction leaflet (if available), website, Facebook page (if there was one) and TripAdvisor content, to see how this corresponds to the answers given by respondents, as described in Chapter 4. Whilst this initial review proved useful in supporting the discussions during the interviews, it was subsequently replaced by the more rigorous and thorough netnographic review described in more detail later in this chapter (see Appendices 5-7). Intended to be a quick 'snapshot' of activity, this subjective review provides some initial information on promotional activity. From the author's own knowledge, most attractions manage to convey an accurate picture of the experience that visitors may expect on site, which is clearly understood by visitors as shown by the nature of the comments and reviews on social media. Negative comments mostly reflected unhappiness with a particular aspect of the attraction on that particular day, such as parking, catering or the admission price being considered too high. However, there was clearly potential for attractions to regularly review their digital footprint to at least monitor what visitors may be saying about them, even if some of the comments were at the extremes of the like/dislike scale. One TripAdvisor comment from 2012 about attraction F was: '*disappointing – expensive and not how the brochure explains it'.* That may have been an indication to review the key messages in the leaflet. Whilst most TripAdvisor comments for A were positive, there was one negative: '*expectations were high from the other reviews, but we were disappointed'.* This was more difficult to deal with since there is always the possibility that different people will interpret messages in their own way. For attraction M, the comments ranged from excellent: *inspiring venue',* to terrible: '*poorly signed and looking tired'.* Again, comments such as the latter may help highlight a particular issue or support the case for finding the funding for improvements.

During the interviews in Phase 2 it was clear that websites had become increasingly important to Welsh visitor attraction operators: *leaflets and website are the main marketing things we do (I); the website is useful for visitors before they come (K); we keep the website up to date with news and what's happening (M).* However, the use of social media is increasing and many attractions appear to be making the most of the opportunities it offers: *we use Facebook a great deal and try to keep it as up-to-date as we can (A); we make a lot of use of social media, Twitter and Facebook, and find that we get comments and messages from visitors this way which is more interactive (B); we use Facebook and twitter a lot (E); our social media and online presence with the website(G)*- for this small museum they were more important than leaflets, although *improved signage would also help*. *Facebook is important for social media (I); social media is overtaking leafleting (J); we do use Facebook and Twitter (K); Facebook is useful, it's very instant in terms of response and its low tech as well which helps us (L).*

5.4.2 Phase 3 results: Welsh visitor attraction operators' online activities

Chapter 4 explains how a sample of 84 attractions was chosen to examine digital presence as part of an analysis of attraction responses to online visitor feedback (research objective 3), drawing on a variety of sources and methodology. The review of visitor attraction websites concentrates on interactive features, and the extent to which visitors are involved in the co-creation of experience, whilst the social media site results are focused more on the satisfaction of visitors with their actual visit to an attraction. This therefore made direct comparisons of the results potentially problematic in that they were effectively measuring different things, but overall it was decided that this approach was still valid since they were all part of the online presence of the attractions, which was being investigated. Therefore, the percentage results are shown together, but with the proviso that the website scores should not be directly compared with the social media satisfaction results. The website percentages reflect owner/user interaction rather than any satisfaction. The list of results for each attraction is shown in Appendix 8.

5.4.3 Welsh visitor attraction websites

The original list of 53 attraction websites examined by Blum and Fallon (2001) was reduced by 12 which had closed or were deemed to no longer meet the Visit Wales attraction definition. There were 8 attractions that were included in both samples, reduced to 7 because two had merged and shared the same website. This resulted in a sample of 40 attraction websites as shown in Appendix 7. Comparison with the results of the amended Blum and Fallon (2001) survey show some significant positive increases in website content and interactivity, but also highlight the fact that many attraction websites are still deficient in some areas. This is summarised in Table 5.57, which shows the percentage score for each of the features identified in the website content.

Table 5.57 Review score of website features (all figures shown are percentages)

Feature	**Blum and Fallon (2001) original 53 attractions**	**Revised list of 40 Blum and Fallon attractions (2015)**	**2015 list of 84 attractions**
Product	51	100	99
Price	70	93	95
Promotion	4	13	11
Place	3	33	25
Customer relations	15	51	46
Technical aspects	48	73	68
Total	**36**	**61**	**57**

(**Source: The author, 2017**)

The figures show that the websites of the 40 Blum and Fallon (2001) attractions have improved considerably across all features by 2015. There are some differences between the 2015 list of

Blum and Fallon attraction websites and those of the increased sample of 84 (which includes the Blum and Fallon 40 attractions), which shows a slightly lower score for all features. A possible reason for this is the fact that the Blum and Fallon list includes 10 railway attractions, which made up 25% of the total of 40. This may have brought in a bias to the results since railway websites in general tend to have more interactive features such as downloadable timetables and online booking which may be unrepresentative of all attraction types, and which have increased in functionality. The 2015 sample of 84 attractions, drawing on a wider range of different types of attraction, is therefore felt to be a more representative sample of visitor attractions in Wales. Some of the key differences between 2001 and 2015 (with the exception of one attraction that had a new website that did not include a detailed description of the attraction itself, thereby scoring 4 out of 5 for 'product'), are that all attraction websites in 2015 display the required details for 'product'. This is a significant improvement on the 2001 findings. However, in 'price', 3 attractions did not mention that they had free entry, and in each case, did not respond to queries from potential visitors querying this on social media sites. 'Promotion' saw some improvements since 2001, but still had the lowest score with only 11% of attractions providing at least one of the features in the category. Most attraction websites make good use of colourful pictures, but are in reality still little more than online brochures, with little interactivity. This was further confirmed in 'place' – whilst there has been an increase in the number of attractions with online ticketing or shop sales, they are still in the minority at 25% of all attraction websites in the survey. This is a significant point to note, since developments in digital technology during the period under review should have meant, for example, that new systems facilitating online ticketing in particular could have been of benefit to many attractions (Fotis *et al*, 2012; Jalilivad *et al*, 2012). For larger attractions, or those that need to manage visitor flows or the effects of seasonality, the ability to offer discounts or variable pricing offers through a cost-effective online system would surely be of benefit to them. Such systems could also be an integral part of the promotion of special events at attractions (Ma *et al*, 2003; Buhalis and Law, 2008; Law *et al*, 2014). There are examples of good practice from amongst the larger attractions such as theme parks and most railways of the use of such technology. Most visitor attraction managers are obviously aware of the growth of importance of Web 2.0 technologies and opportunities, and many attraction websites in 2016 make good use of links to social media sites such as Facebook and TripAdvisor.

The inconsistent approach to dealing with the different channels emerging from this research means that the overall picture still contains examples of weaknesses in the marketing approach of attractions. This is particularly true when considering the use of UGC and visitor reviews. Many attractions still do not appear to make effective use of the positive comments from reviews in their promotional activity, so that the overall score for this category, whilst higher than 2001, is still less than half of all attractions (46%). There was also an increase from 48% to 68 % in 'technical aspects' which reflects the fact that many websites have links to Facebook and TripAdvisor as well as YouTube. However, it also includes those that had a more detailed virtual presence such as access to archives, which may still not have been interactive, just an additional more detailed web presence.

Table 5.58 Average scores from analysis of websites and social media UGC sites

	TripAdvisor	**Facebook**	**Google**	**Attraction Website**
Average score (where available)	85% satisfaction	84% satisfaction	83% satisfaction	60% score for interactive features
Entry has not been 'claimed' or 'adopted' by attraction	40% (30)	44% (35)	89% (75)	All attractions had websites
No entries or listings	10% (8)	15% (4)	20% (17)	
No responses or postings from attraction	46% (35)	66% (53)	82% 55)	

(**Source: The author, 2017**)

The percentage score shown for the websites in Table 5.58 refers to the features and interactivity based on the cross-sectional content analysis with similar features and categories to those used by Blum and Fallon (2001). The average figure of 60% shows a marked increase on the previous 36%, but this must be placed into the wider context of huge growth in website development during that period. When examined in greater detail, most of the attractions score well on product and price details but most still lack interactive features as basic as downloads of information or additional video/audio content. As noted above, some of the Welsh visitor attractions websites have links to Facebook pages and YouTube channels to augment their website content. However, in terms of the co-creation of experience described in Chapter 2, many attractions still seemed to be lacking in this use of the latest technological features and capabilities that are available, and remain little more than online poster sites, albeit in many cases quite attractive ones, with high quality colour images used.

5.4.4 Review of Social Media content (TripAdvisor, Facebook and Google)

The review of visitor attraction UGC sites initially appears to show a positive position in terms of visitor satisfaction according to reviewers' scores, with all achieving over 80% as shown in Table 5.58 above. This positive figure however, apparently hides the important fact that a significant number of attractions do not appear to have provided any formal input by 'claiming' their entries. For TripAdvisor, 50% of attraction entries were not claimed or had no listing (listings can be created by attraction operators or reviewers). Facebook had an even higher rate of 59% of listings not claimed or missing. For Google, this figure rises to 89% not claimed. Attraction operators are apparently missing an obvious opportunity to raise the profile of their attractions through the opportunities offered by social media review sites. A more detailed summary of the analysis of UGC and satisfaction ratings is presented in Table 5.59:

Table 5.59 Comparison of ratings on UGC sites and websites

Satisfaction rating %	<30	30-39	40-49	50-59	60-69	70-79	80-89	90-100	<5 ratings	No Entry
TripAdvisor	0	7(8%)	0	3(4%)	5(6%)	8(10%)	19(23%)	41(49%)	0	7(8%)
Facebook	0	0	0		1(1%)	10(12%)	19(23%)	35(39%)	0	20(24%)
Google	0	0	2(2%)	1(1%)	3(4%)	5(6%)	14(17%)	20(24%)	25(30%)	14(17%)
AttractionWebsite (interactivity)	0	6(7%)	12(14%)	14(17%)	29(35%)	17(20%)	3(4%)	3(4%)	0	0

(**Source: the author, 2017**)

Tables 5.58 and 5.59 show that whilst the average satisfaction figures for the UGC review sites may appear similar, many of the scores are based on small numbers of reviews, provided by between 5-30 respondents. These are also the ones that have shown satisfaction scores of 100% on some of these sites. As noted in Chapter 2, this is one of the weaknesses of UGC sites, in that a more accurate picture of overall visitor satisfaction only truly emerges once the number of reviews reaches the hundreds or thousands and, even then, can still be affected by the subjective comments of visitors about a particular experience that may be outside the direct control of the attraction, such as the journey to the site. It is interesting to note that for those attractions that did have large numbers of respondents (see Appendices 6-8 for detailed description of individual data), the satisfaction was similar across TripAdvisor and Facebook, and sometimes even Google, where the numbers of reviewers tended to be very low.

Grouping the analysis of social media sites and websites into the categories for the different attractions allows for comparisons to be made between categories, as shown in Table 5.60 below:

Table 5.60 Comparison of percentage scores for online channels

Category	TripAdvisor % satisfaction	Facebook % satisfaction	Google % satisfaction	Website %
boat trip	98	100	50	63
castle	92	86	72	72
countryside/natural	27	58	26	67
gallery	65	91	39	50
gardens	61	56	58	62
heritage centre	48	0	0	63
historic building or site	86	55	38	56
indoor play	100	83	0	55
museum	81	43	30	52
railway	78	82	74	67
theme park	70	63	79	64
themed attraction	79	85	34	55
zoo/wildlife	79	56	57	67
Totals	964	858	557	793
Mean	74	66	43	61
Standard deviation	20.4	26.4	25.6	6.7

Source: The author, 2017)

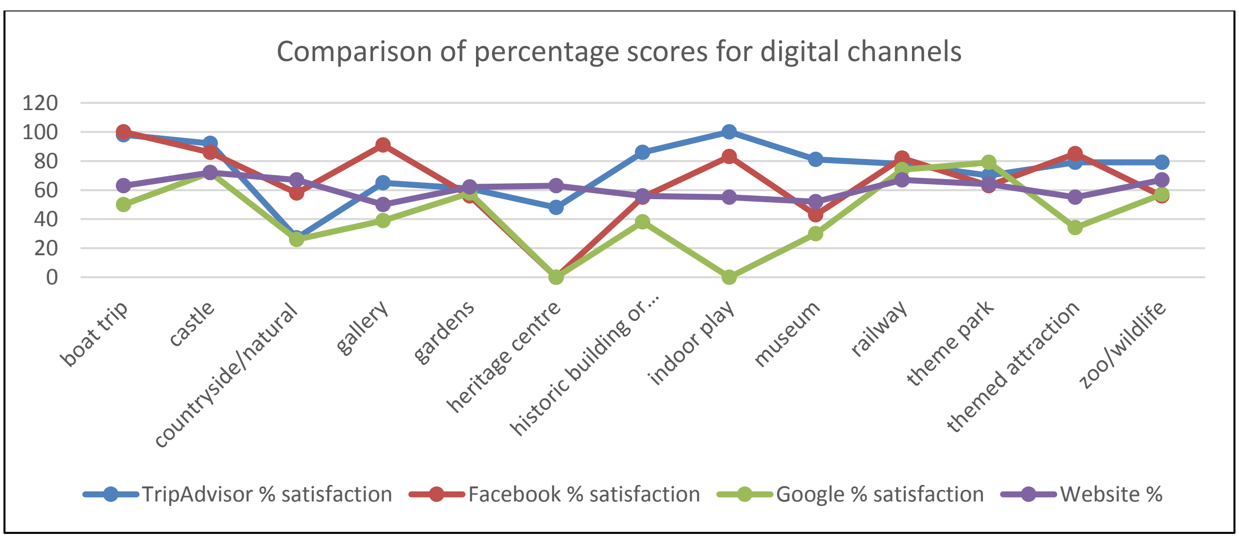


Table 5.60 shows the distribution of the percentage scores for each of the online channels reviewed. As noted previously, some caution should be taken when commenting on the results, since the percentages for UGC sites relate to the satisfaction scores, whilst those of the websites refer to the analysis of interactive features. The categories in the sample also have significantly different numbers of attractions within them – ranging from one 'indoor play' to 12 'museums' and 13 'railways'. This is partly a result of having to incorporate the Blum and Fallon (2001) list of attractions, but, as demonstrated in the analysis in Chapter 3, the overall sample of attractions within the online review can still be considered to be representative of the Welsh visitor attractions sector as a whole. There can also be significant differences in the number of attractions in each category using the various digital channels available to them – the total number of reviews for each attraction on each channel is shown in the tables in Appendices 5-7.

All visitor attractions in the sample had websites, and the interactive features on those websites had generally improved since previous reviews and analysis, as shown in Table 5.57. It is interesting to note the relatively small divergence of standard deviation amongst websites, compared with that of the UGC sites in Table 5.60 above, which also appears to confirm this overall increase in interactivity. Further nalysis of above shows that there appears to be a 'clustering' of results for some categories of attractions. The category 'gardens' has the smallest difference between percentage scores across the channels (6%), followed by two others: 'railway' (15%) and 'theme park' (16%). A complication for further analysis and comparison of these differences for other categories arises from the fact that there can be wide variations if one channel is missing, or has fewer than 5 reviews, resulting in a score of zero, as explained in the Methodology. For example, an art gallery that has a score of 85% for its Facebook and 60% for its website yet has no entry on TripAdvisor or Google, resulting in zero scores for those sites. It will have a low overall figure if compared with other attractions, yet may have a very good entry on Facebook, and a relatively good, interactive website. The full results of percentage scores for attractions on the various digital channels available are included at Appendix 9.

A further review of the percentage scores for the different UGC sites can also be carried out using chi-square analysis, to assist in identifying if any of the observed distribution of results are due to chance, as shown in Table 5.61.

Table 5.61 Chi-square analysis of Welsh visitor attraction UGC sites

Results				
% age scores	TripAdvisor	Facebook	Website	*Row Totals*
Over 75	64 (47.42) [5.80]	58 (40.47) [7.60]	19 (53.11) [21.91]	141
50-74	10 (19.17) [4.39]	5 (16.36) [7.89]	42 (21.47) [19.63]	57
under 50	1 (8.41) [6.53]	1 (7.17) [5.31]	23 (9.42) [19.59]	25
Column Totals	75	64	84	223 (Grand Total)

(**Source: The author, 2017**)

The chi-square statistic is 98.6376. The *p*-value is < 0.00001. The result is significant at $p < .05$. The Null Hypothesis (H_0) that high review percentage scores on UGC sites equates to visitor attraction websites with high levels of content and interactive features is rejected.

The alternative Hypothesis (H_A) is that high review scores on UGC do not follow from visitor attraction websites with greater levels of content and interactivity.

5.4.5 Welsh visitor attraction operator interactions with online visitor feedback/comments - summary

The interaction of Welsh visitor attraction operators with UGC from visitors in the form of comments, reviews and queries (as shown in Appendices 5-9) varies considerably. The results of the analysis are included at Appendix 10 and summarised in Table 5.60. There is a wide variation in the interaction of Welsh visitor attraction operators with the UGC from visitors in the form of comments, reviews and queries (as shown in Appendices 5-10). Whilst there were Facebook sites created for nearly all visitor attractions in the sample (only 2 attractions were not listed), many of these (33%) were unofficial, and had not been adopted by the attraction. None of the attractions responded to comments or postings on the 'unofficial' sites, and 22% did not respond to comments on their own official sites.

Table 5.62 Summary of attraction operators' responses to UGC

	Facebook	**TripAdvisor**	**Google**
Regular postings	50 (52%)	N/A	N/A
Some postings	5 (5%)	N/A	N/A
Respond to all or most comments	3 (3%)	13 (16%)	0
Respond to some	17 (18%)	29 (35%)	1 (1%)
No responses	21 (22%)	36 (43%)	85 (96%)
Unofficial listing	32 (33%)	N/A	2 (2%)

No listing	2 (2%)	7 (8%)	0
N/A – duplicate or not directly linked to the attraction	0	12 (15%)	13 (15%)
Total review sites	**97**	**83**	**89**

(**Source: The author, 2017**)

Overall, only 57% of Facebook sites had postings from the visitor attractions. The postings varied from regular photographs and news updates from the attraction, to sporadic burst of online activity at different times of the year, usually linked to events. For TripAdvisor reviews, there were a core of attractions regularly responding to visitor comments (16%), but whilst 51% of attractions responded to some, or all of the reviews or comments, Appendix 10 shows that many of the responses were sporadic, with no apparent pattern or regularity as to which visitor comments would be answered. Most attractions in the sample had an automatically generated Google site. There is an obvious opportunity for visitor attractions to make the most of this online marketing opportunity and ensure that the basic details such as opening times and contact details are correct, even if potential visitors were only using Google to search for the attraction's website address. Yet only 4 visitor attractions (5%) appeared to have monitored this and had posted replies to visitor queries. 23 Attractions (27%) had no entry on the Google search 'header' for results, which allows for basic details of location address, contact details and website link to be provided. Although 48 (57%) of the Google search page results for specific attractions had basic details of the attractions, they also contained comments from visitors that had not been responded to as well as queries from potential visitors that were unanswered.

There was no clear link between visitor attraction involvement on each of the UGC sites. An attraction that had a very good Facebook presence (an art gallery or countryside attraction for example), with regular postings and responses to visitor queries, might not respond at all to TripAdvisor reviews or queries. This might be acceptable if there was a consistent approach to the management of responses on that UGC site, but this only happened in a small number of attractions. It would appear that whilst some attractions were choosing to monitor and respond to Facebook or TripAdvisor (some historic buildings), most were simply 'dipping' in and out, rather than systematically monitoring and responding to the comments, reviews and queries from visitors. It was also noted, for example, that an attraction with a high, positive, review score on

Facebook (a museum), had posted no comments or content itself, and appeared to be content to rely on visitor postings only, and the fact that it was getting positive reviews overall (although it also did not respond to the few negative comments or visitor questions that were submitted). The size of the attraction did not seem to be relevant, with some smaller attractions being actively involved in regular Facebook postings, yet had a fairly basic website (Appendix 9). Attractions with a low score for their interactive website might have a high score for their UGC sites (heritage park), perhaps suggesting that they are choosing not to invest money into website development but are willing to invest time in other online activities and interaction with online visitors.

5.4.6 Online presence – concluding remarks

The results of the netnographic review show that the online presence of the 84 attractions analysed varies quite considerably. All have a website, with some being very well developed with a host of interactive features, including online booking. Compared with the Blum and Fallon (2001) survey, the level of website interactivity of 40 comparable attractions had increased from 36% to 60%. This seems to reflect the increasing drive towards having websites, especially as the cost of developing and maintaining websites has fallen considerably by comparison since then (Buhalis and Foerste, 2015; Neuhofer *et al*, 2015). However, many attractions still seem to perceive their website or Facebook presence primarily as something to supplement or augment the traditional method of communication – the promotional leaflet. Some, very attractively presented websites with colour pictures and additional information about the attraction, are still very weak in interactive features, in that they do not encourage contributions from, or the involvement of visitors (or potential visitors) to engage online with the attraction (co-creation of experience). Confirmation of this comes from the attitude of some attractions to the use of UGC sites. On TripAdvisor only 51% (42) of attractions supplied any response to visitor comments, queries or complaints. This was similar to the response from Welsh visitor attraction operators interviewed as part of Phase 2 of this PhD research, where 54% stated that they regularly respond to comments (Table 5.35). On Facebook, the situation was even worse, with only 21% (20) of attractions responding to visitor comments or queries. Perhaps Wales is not alone in this situation – a review of social media profiles of Catalan museums found that less than 60% had a profile of their own and the majority significantly lacked relevant feedback from followers (Badell, 2015).

The detailed satisfaction scores of attractions in the sample, as shown on TripAdvisor, Facebook and Google (Appendices 5-9) range from 37% to 100%, although most are above 70%. This shows that most reviewers leaving comments and ratings on UGC sites of Welsh attractions in the sample, would appear to be happy with their overall experience. Yet this may hide a deeper concern that many attraction operators are not engaging with their visitors online, not responding to posts and questions, and are not making the most of the opportunities presented by these new methods of communication (Quadri-Felitti and Fiore, 2013). The reasons for this, emerging from the semi-structured interviews appear to range from apathy; a claimed lack of knowledge of how to engage in new media; and a dismissal of the potential and opportunities offered by Web 2.0 technologies. It may be that whilst the general picture of satisfaction appears good, it is clear that the majority of attraction operators are not engaging with visitors online to the extent that they perhaps should be doing. A significant percentage of attraction entries on all UGC sites had not been adopted by the operators or did not appear to have any official content. This ranged from 40% for TripAdvisor; 44% Facebook and 89% for Google entries. In many cases the Google entries had incomplete listings for the attraction. If potential visitors are only using Google as a search engine to find an attraction's website, then this may be felt acceptable by the attraction. But the key issue is that the attractions are ignoring a potentially important, free promotional tool, and one that may become increasingly relevant as more potential visitors use online sources of information as part of their decision making and making recommendations to others (Hosany and Witham, 2010; Yoo and Gretzel, 2016a).

5.5 Chapter conclusion

The three phases of primary research, when taken together, present a clear picture of a fragmented approach to marketing by visitor attractions. The analysis of online activity in particular, shows that whilst all attractions in the sample have websites, many of these were little more than online promotional leaflets in nature, with few interactive features. Attraction operators state that websites are their most important marketing tool, yet the overall rating of interactivity on websites is 60%. Particular features that are underperforming on websites are 'promotion' and 'customer relations'. The use of social media sites also varies, with some attractions not engaging at all with the features and opportunities offered by Web 2.0 technology, and others dipping in and out of UGC sites, or choosing to only use one. Some attraction operators respond regularly to postings on Facebook and TripAdvisor, but overall the situation is still one of non-engagement (Kim, 2014; Neuhofer *et al*, 2015; Christofle *et al*, 2016). On TripAdvisor, 46% of attractions fail to post any information or responses to reviewers' comments, and this rises to 66% for Facebook and 82% for Google. Perhaps Google attraction details, as opposed to the website listings, are not as crucial for developing potential attraction visitors since people could be going there to find the website link, but the relatively low scores for responses on TripAdvisor and Facebook still show that many attractions are simply not engaging in the online co-creation of experience, despite the importance of doing so:

> '*In order to enhance tourism experiences, it will be crucial for businesses to extend their sphere of activity to the virtual space to intensify engagement, extend experience co-creation and offer a higher value proposition to the tourist in the online world'* (Neuhofer et al, 2013 p 550).

One small independent museum that had very good reviews on TripAdvisor did not have a Facebook presence at all, and this must surely have been a missed opportunity for some simple, extremely cost-effective marketing communications to increase visitor numbers and develop a dialogue with visitors. 37% (31) of the attractions in the netnographic review had not 'claimed'[47] their attraction on Facebook, so that the listings were still 'unofficial'. This meant that they were missing an invaluable opportunity to communicate with potential visitors by not only providing up-to-date and accurate information on their attraction, but also ensuring that it acts as an enticement to visit (Sigala, 2012; Soresen and Jensen, 2015). On TripAdvisor, only 50% of attractions (40) supplied any response to visitor comments, queries and complaints. The majority of these were sporadic, not consistent in nature, and in many cases simple questions that may have led to a visit, such as queries on opening times and facilities, appear to have been ignored. By engaging with visitor comments on social media sites such as Facebook and TripAdvisor, in a timely and appropriate manner, attraction operators can ensure that potentially harmful negative comments are dealt with or at least responded to, as well as engaging with visitors in the co-creation of the attraction's online or digital presence.

[47] All of the UGC sites allow business owners to 'claim' their site and therefore make it appear as if they manage it. Additional information can be provided as well as a link to the attraction's website.

To gain further insight into the viewpoint of attraction operators, a series of semi-structured interviews were carried out. The thematic analysis of the interview transcripts which was facilitated by including the main comments grouped within seven main themes or topics, clearly shows that some attractions are more marketing orientated and have the experience and marketing capability to manage their activities effectively. Other, usually much smaller attractions do not appear to have the knowledge, capability or sometimes, apparently, even the desire to try and implement any sort of market analysis or other marketing-related activity such as identifying their audience and developing a targeted schedule of promotional activities that could include social media and digital techniques (McKercher *et al*, 2002). The responses show that in certain key areas relating to the visitor experience, the attraction operators themselves admit that there can sometimes be a gap between the operators' view of what the attraction offers and what visitors expect in terms of experience. Even when the operators are aware of this, they apparently choose not to do anything about it, most often for operational or managerial reasons. These attractions are clearly demonstrating a product-led philosophy that is either unsustainable in the long term, or means that the attraction may be underperforming by not meeting the needs of the market, resulting in a disconnect in the online experience of visitors. The Welsh Government remains optimistic about the future online activity of Welsh tourism businesses: "*the vision to 2020 is to bring a 'digital-first' culture not only to the heart of Visit Wales, but also to the centre of all Wales destination marketing activity and to the broader tourism industry"* (Welsh Government, 2016, p 13).

Chapter 6

Conclusion

6.1 Introduction

This chapter reflects on the main findings and discussion points from the preceding chapters and presents the conclusions together with the theoretical contribution in line with the overall research aim of the study (Chapter 1). Managerial, operational, and strategic implications for the Welsh visitor attractions sector arising from this study are also presented. Finally, the limitations of the work are considered and recommendations for future research are made.

The overall aim of this PhD thesis is:

> To develop a supply-side analysis of marketing practice and the management of online communications and feedback relating to the Welsh visitor attraction experience.

The specific research objectives are:

- To provide an updated review of the Welsh visitor attraction landscape;
- To investigate Welsh visitor attraction operators' understanding of the visitor experience and its use as a marketing tool;
- To explore Welsh visitor attraction operator engagement with online communications and feedback relating to visitor experiences.

The main study aim was focused on gaining a critical review of the marketing activities of Welsh visitor attractions. In particular, an analysis of their online presence and involvement in the co-creation of experience through interactions with online visitor reviews and feedback. It was recognised that this was a neglected area of research and one in which this PhD study could make a theoretical contribution.

- Visitors to an attraction of any kind, whether it is a museum or art gallery, theme park or area of outstanding natural beauty, will have feelings relating to what they have seen or done which result from their experience of that place. This can often be the result of tangible and intangible as well as perishable (time-based) factors and, in this respect, it is argued that the attraction experience conforms to many of the models of the service product (Chapter 2). In terms of consumer behaviour, the visitor experience has been highlighted to constitute the essence of the attraction 'product' (Ritchie *et al*, 2011), yet the extended marketing mix model has not previously been fully applied to visitor attractions (Kim, 2014). The academic context and understanding of the visitor experience has clearly evolved and developed, with relevant connections being made to elements of the 'servicescape' (Bitner 1992); 'imagescape' (Wanhill 2008); 'tourismscape' (Binkhurst 2009) and 'experiencescape' (O'Dell, 2007; Mossberg 2007; Quadri-Felitti and Fiore, 2013; Kim, 2014, 2016). Issues of experience, value, quality and satisfaction have often been acknowledged through the SERVQUAL measurement technique (Parasuraman *et al*, 1988) and applied to the attractions sector (Peric and Wise, 2015; Sorensen and Jensen, 2015; Swart, 2016). Yet, to date, the perspective taken by many tourism researchers has very much been from that of the visitor or customer rather than the providers – the attraction owners or operators. This research has sought to redress the balance by examining these factors from the attraction managers' viewpoint, their understanding and knowledge of the various needs, wants and desires of visitors, and also their own priorities, in accordance with research objective 2: '*to undertake research with Welsh attraction operators to identify their understanding of the visitor experience and its use as a marketing tool*'. The first stage of activity was to examine the visitor attractions sector in Wales, as the foundation for selecting the samples of attractions to take part in the primary surveys, in line with research objective 1: '*to provide an updated review of the Welsh visitor attraction landscape.* Finally, a netnographic review of websites and social media UGC platforms was implemented to fulfil the requirements of research objective 3: '*to explore Welsh visitor attraction operator engagement with online communications and feedback relating to visitor experiences'*.

The key points or 'headlines' emerging from the different phases of the research are outlined in the following sections prior to considering the overall contributions of the thesis in relation to the aim of the study.

6.2 Shifting concepts of the visitor attraction 'landscape'.

The context of this research involves an ever-competitive and arguably complex operating environment for visitor attractions (Leask, 2003; Morrison, 2013; Swart, 2016). It seems that little has in fact changed since the review of the marketing activities of certain types of attractions by Dibb (1995) over twenty years ago, with different attractions showing significant variations in their involvement and commitment to marketing activities. From one end of the spectrum where larger attractions have formal marketing functions, that carry out research and planning, to the other extreme, where "*marketing is at best informally organised and at worst an ad hoc and ill-disciplined arrangement*" (Dibb 1995 p271). Many attractions do not seem to have changed in their approach to, or use of, marketing processes or the opportunities of online media (Blum and Fallon, 2001; Quadri-Felitti and Fiore, 2013). The issue of greater competition and limited demand leading to an increased level of marketing professionalism, as predicted by Middleton (1989) does not seem to have materialised for many smaller attractions, based on the findings of this research.

It also appears that the predicted possible rationalisation of the attractions industry (Stevens, 2000a; Swarbrooke, 2001a) has yet to happen or may even have been overtaken by other market forces and social changes (Morrison, 2013; Quadri-Felitti and Fiore, 2013; Neuhofer *et al*, 2015). In accordance with research objective 1, Chapter 3 describes how a baseline of Welsh visitor attractions was developed as the foundation for analysis in 2015. The results were compared with previous studies (Stevens, 2000; Blum and Fallon, 2001) to show that whilst there had been some changes in the nature of Welsh visitor attractions since 1998, the sector remains dominated by the third sector. Other concerns and themes have emerged such as sustainability, and Pomering *et al* (2011) describe the ways in which the marketing mix can be adapted for sustainable tourism by focusing on many of the elements covered in Chapter 2, and in particular the seven Ps of the extended marketing mix plus two others: 'packaging' and 'partnership'. An analysis of a tourism organisation's marketing mix will "*provide a comprehensive picture of* what *is to be managed, and sustainability indicators can provide guidance on how"* (Pomering *et al*, 2011 p 966). This is in agreement with McKercher (2002), in the belief that smaller firms may struggle to measure or even understand their (marketing) environment, and this is an observation that has also emerged from the findings of this research on the marketing of visitor attractions.

6.3 A disconnect between operators and visitor experience.

The results of the Phase 1 questionnaire surveys and Phase 2 interviews with attraction managers and operators show that there is often an assumption made by them that they think they know what their visitors want, when in fact in some cases they do not. Or they choose to ignore visitors' needs and go by their own priorities (for example, failing to respond to questions about opening times on TripAdvisor or Facebook). The need to monitor and take account of visitor feedback is a key factor in visitor attraction management (Stevens, 2000a; Fyall *et al*, 2008; Swarbrooke, 2009). Yet, whilst all visitor attractions appear to have visitor comment books, and operators state that they check them regularly, this does not mean that they take account of the feedback from visitors. This may be understandable if it were linked to the basic operating criteria or purpose of the particular attraction, but it is of greater concern when it is perhaps manifested as a management ethos, i.e. in terms of a supply-led or 'producer/supplier-knows-best' approach (research objective 2). Whilst the majority of attractions tried to clearly describe or illustrate what they believed to be the visitor experience in their promotional and website efforts (research objective 3), some operators stated that they believed that there was sometimes a disconnect or gap between this projected image and the actual visitor experience (the overall research objective aim). This is most clearly shown in the response to Question 12 of the online survey (Table 5.22), where 48% of the attractions surveyed said that there was sometimes a gap between the experience they were trying to offer, and the reasons given by visitors for coming to the attraction. In his description of the attraction 'imagescape', Wanhill (2008) says that a failure to effectively convey the 'imagescape' could lead to under-performance.

6.4 Implications of netnographic review for visitor attractions

With developments in Web 2.0 technology, the emergence of Marketing 3.0, and the increasing use of UGC platforms, the relevance of the online visitor experience and co-creation of experience has been demonstrated (Kotler *et al*, 2010a; *Leung et al*, 2013; Campos *et al*, 2015; Kiralova and Pavliceka, 2015; Neuhofer *et al*, 2015; Kim, 2016; Sigala, 2016; Fedeli, 2017). The analysis of the use of social media as a communication and promotional tool in this PhD study was confined to 84 attractions. This 84 comprised 19% of the 450 attractions included in the online survey and 14% of the total number of attractions in Wales (585) meeting the criteria of the Visit Wales definition (Chapter 3). The results of the netnographic review clearly show that the majority of attraction operators appear to be ignoring the potential opportunity of UGC platforms for promoting visits to their sites and developing an online relationship with their visitors through co-creation of the experience. During the early stages of this PhD research it was decided to concentrate on the better-know social media channels Facebook and TripAdvisor as the main focus of enquiry. Other channels such as Snapchat (2010) and Instagram (2011) were still relatively new and had not gained the high usage figures that later developed. These were therefore not included in the surveys of attraction operators and subsequent critical analysis. The comments from the attraction managers and owners interviewed in Phase 2 confirm that there is clearly a variance in the use of social media as a means of interacting with visitors. In short, some attractions have wholeheartedly taken to the use of new media; others seemed to dip in and out sporadically; and some ignore it completely. Thus, mixed practice exists. The operators' viewpoint is that TripAdvisor comments are often seen as being too subjective and exhibiting extremes of positive and negative feelings to be considered a 'true' or credible barometer of visitor feedback. It was evident in the research findings that despite an overall high level of satisfaction shown by reviewers' comments, there can often be a high incidence of negative postings, for example with regard to specific one-off events such as short-term parking problems, that really need an input or response from the attraction operators, even if it only an apology for inconvenience caused. Although it is only a minority of those visiting tourism UGC sites that actually write the reviews, they are most likely read by all online visitors (Gretzel *et al*, 2011). The fact that UGC online reviews have a significant impact on consumer behaviour has been well documented (Zeng and Gerritsen, 2014; Munar and Jacobsen, 2014; Kladou and Mavragani, 2015; Sotiriadis and van Zyl, 2016)

There was no clear, consistent link or correlation between visitor attraction involvements on each of the UGC sites. An attraction that had a very good Facebook presence (an art gallery or countryside attraction for example), with regular postings and responses to visitor queries, might not respond at all to TripAdvisor reviews or queries. It would appear that whilst some attractions were choosing to monitor and respond to Facebook or TripAdvisor (as was the case with some historic buildings), most were simply 'dipping' in and out, rather than systematically monitoring and responding to the comments, reviews and queries from visitors. It can also be noted that an attraction with a high, positive, review score on Facebook (a museum for example), has posted no comments or content itself, and may be content to rely on the fact that it appears to be getting positive reviews overall from visitors (although it had also not responded to some negative comments and visitor questions). The size of the attraction also does not seem to be relevant, with some smaller attractions being actively involved in regular Facebook postings, yet having a fairly basic website (Appendix 9). Attractions with a low score for their interactive website might have a high score for their UGC sites (heritage park), perhaps suggesting that they are choosing not to invest money into website development but are willing to invest time in other online activities and interaction with online visitors. A possible link between high review percentage scores on UGC sites and visitor attraction websites with high levels of content and interactive features was not established.

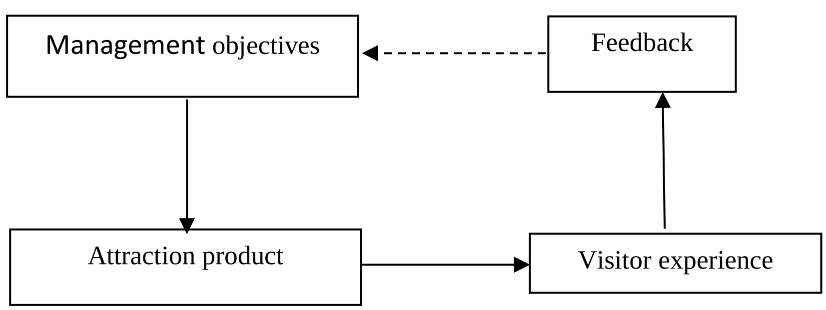
There are similarities with the lack of engagement with visitor feedback in comments books, and this would appear to have persisted into the digital age. New technologies do not appear to have brought new mind-sets towards taking account of, or responding to, visitor feedback for many Welsh visitor attractions. However, it cannot be dismissed that UGC has emerged as an influential promotional tool for the tourism sector and visitor attractions in particular.

The social media platform Facebook is apparently under-utilised as a communications tool by many of the Welsh visitor attractions examined in this thesis. Whilst some examples of best practice were noted, overall only 63% of attractions in the sample had 'adopted' or taken ownership of their Facebook page and, even then, many attraction details remained incomplete. Many entries are still 'unofficial' and lack basic information such as opening times and contact details that could easily be entered by the attraction operators. It was observed that visitors are posting comments about their experience, and even asking questions, without any input or response from the attractions. A similar lack of engagement was noted on TripAdvisor. It was seen that 50% of attractions did not post any replies to comments or questions from visitors, thereby effectively ignoring this part of the co-creation of experience. Such disconnect between attraction operators and the visitor experience can have negative implications for tourism businesses (Sotiriadis and van Zyl, 2015; Neuhofer, 2016). The fact that some operators may be aware of this gap and still choose to ignore it may indicate a level of disinterest or apathy and suggests that some Welsh visitor attractions at least are still product-led rather than market-orientated in line with the observations made by Stevens (2000a).

6.5 Theoretical contributions in relation to the overall research aim

Several marketing models were considered, that have direct relevance to this PhD research and the themes of visitor experience and marketing of attractions that are investigated in Chapter 2 and drawn out further in Phase 1 and 2 of the data collection. The tourist attraction model of Leiper (2004) concentrates on visitor motivations for visiting attractions, but these motivations are clearly incorporated within the earlier tourism marketing process of Youell (1998). Both these models exclude management issues as a driving force for attraction operations that would also have an impact on the visitor experience. Cherem's (1997) model of interpretation provides a possible framework that could be adapted to cover the relevant issues that link the visitor experience and the attraction operators' needs. The 'management realities' referred to by Cherem, are the practical limitations or constraints within which the attraction manager or operator must operate. The same elements are labelled 'environmental factors' by Misioura (2006). This process involves the delivery of the visitor experience as understood by attraction operators as it has emerged in this thesis, and can be illustrated by Figure 6.1, that incorporates elements of the feedback loop described in Chapter 2.

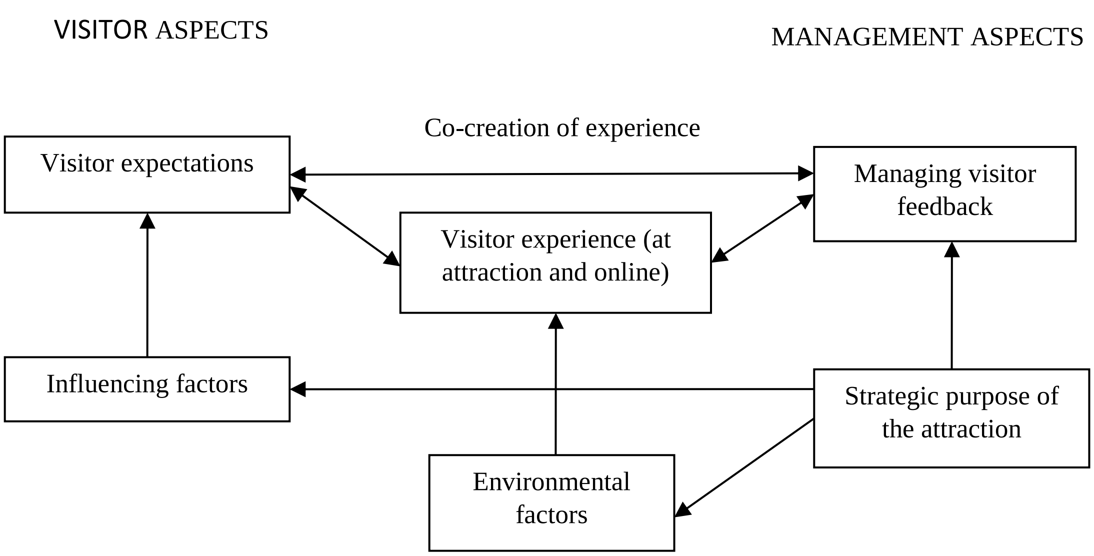
Figure 6.1 Managing online communications and feedback relating to the Welsh visitor attraction experience



(Source: The author, 2016)

This model, based on the results of this PhD research, describes a system where the management objectives have a direct impact on the nature of the attraction product and therefore the visitor experience, but the feedback from the experience, particularly that available through UGC on social media sites may not always be considered by the operators of attractions, hence the broken line between 'feedback' and 'management objectives' (figure 6.1). This indicates a possible breakdown in understanding that can lead to future problems of customer satisfaction (Sterman, 1989; Kytle and Ruggie, 2005; Neuhofer, 2016). Understanding and contributing to the co-creation of visitor experience in a positive manner should surely be a marketing priority for visitor attractions. The concept of experiential marketing, so important in mainstream marketing study, has been seemingly under-utilised so far by those in the tourism and hospitality sector (Williams, 2006). It appears that the attractions sector in particular has not fully engaged with modern experiential marketing concepts and how they can create additional value for visitors in the experience economy. The co-creation of online visitor experience has links to the actual experience of the attraction, as expressed by reviews and comments via UGC on social media sites. By reading the reviews of others, visitors are developing and co-creating their own virtual experience of the attraction which may incorporate opinions formed before and after a visit to the attraction itself. Through connecting and sharing with others on social media, visitors have a new type of experience, and there is no reason why attraction operators should be excluded from this (Tussyadiah and Fesenmaier, 2009; Xiang and Gretzel, (2010). Figure 6.2 therefore incorporates online and actual experiences at the attraction and the link with attraction operators:

Figure 6.2 Factors influencing the co-creation of visitor attraction experience



(Source: The author, 2017; adapted from Cherem, 1997; Youell, 1998; Leiper, 2004; Misioura, 2006; Swart, 2016)

‘Visitor expectations’ are factors that may exist both pre-visit and whilst at the attraction. They can be based on influencing features and any previous experience linked to that attraction or exposure to a brand. For example, a visit to a National Trust (NT) property may have expectations based on visits and experiences to other NT attractions. There may be expectations that a large attraction would have a well-developed online presence. A visitor attraction exceeding or surpassing visitor expectations can help support positive visitor experiences, but Phase 1 of this PhD research has shown that some Welsh visitor attraction operators have demonstrated a disconnect between the experience they are offering and the reasons given by visitors for going to the attraction. ‘Influencing factors’ are those to do with marketing promotional messages from attractions, leaflets, advertising, websites, word of mouth and e-WOM from user-generated-content (social media such as TripAdvisor, Facebook), in addition to the digital messages linked to the attraction. Phase 3 of the research clearly shows that whilst all visitor attractions in the sample have websites, the engagement by Welsh visitor attraction operators’ in using and responding to UGC and the opportunities of Web 2.0 varies considerably.

‘Environmental factors’ are those fixed and variable elements of the attraction and how they contribute to the experience. Physical examples include buildings, interpretation, rides, retail, catering, and events. They can be different depending on the practical limitations or constraints, and also the nature of the attraction, so that the experience gained visiting castle ruins with no visitor facilities or interpretation can be different to that of a site with full visitor facilities and encounters with staff. Online environmental factors relate to the nature of the digital footprint and the different elements encountered by virtual visitors. The ‘strategic purpose’ of the attraction is dependent on organisational and management factors, including the strategic direction and ownership demands. It can vary for private and public-sector attractions. The online factors may be influenced by corporate dictates, so that National Trust, Cadw and Local Authority attractions, for example, will have to follow corporate guidelines and limitations as to their individual use of social media sites. ‘Visitor experience’ relates to the factors of value, satisfaction, and quality, linked to the actual and virtual visit. As noted above, any gaps or variances between expectations and reality are probably not sustainable in the long-term future of an attraction. Finally, ‘managing visitor feedback’ incorporates the collecting, managing and understanding of visitor responses, as well as how those issues are dealt with and how they may influence or affect management action.

6.6 Limitations of the work and opportunities for further research

The main limitations of this work relate to the sample size and results achieved from the sampling methods chosen. It was decided to concentrate on the attractions sector in one country – Wales, in order to examine the changes in a specific geographical area over a specific period of time. Notably, this context had received academic attention in the past (Stevens, 2000a; Blum & Fallon, 2001) and it was an area in which the researcher had personal and professional experience.

Moving forwards, a larger survey could have included a sample of attractions from other parts of the United Kingdom to further investigate any wider geographical issues or, for example, differences in funding or support in different parts of the country. This research was confined to attractions in Wales, and further research could be done to see how the results from this country compare to others such as England, Scotland or even specific regions with large numbers of attractions such as Cornwall. However, traditionally, it has been acknowledged that Wales has been at a different stage of tourism development to its UK counterpart nations and, thus, different levels of government intervention have been used, resulting in different levels of reliance and variations in operational climate.

Weaknesses of the netnographic approach adopted, using the guidelines of Kozinets (2015) relate to problems of possible lack of depth of analysis of key issues, and generalisations being made (Xun and Reynolds, 2010). However, the introspective element and sector-specific understanding of the researcher can help mitigate these issues (Rageh and Melewar, 2013).

The following points were noted as part of the critical analysis process that took place in the review of attraction trends in Chapter 3. They assisted in determining the sample for primary data collection, and could be the focus of future research:

- The introduction of free admission from 2001 onwards to National Museums in Wales sites and its possible impact on the attractions sector was not identified, nor were any changes in the sector due to the global economic downturn of 2008 onwards.

- Wider trends in visitor patterns to attractions could also be investigated further, such as the growth in urban destinations and any changes in holiday patterns.
- Changes in the geographical location and type of different attractions could also be worthy of future examination, but this is outside the scope of this work and its main focus on the online presence of attractions.
- The Visit Wales attraction definition was adopted, together with the conceptual classification of different categories of attractions. Further research on the typology of attractions could be developed.
- Research could be carried out to further investigate the 'visitor experiencescape' at attractions and how it is perceived, understood and utilised by attraction operators, and how it relates to the online co-creation of experience. The more that attraction managers can understand the motivation of their target market of existing and potential visitors for coming to their sites, the better they will be able to plan and develop the visitor experience and make sure that it meets or exceeds expectations.
- The netnographic element in this research was based on a passive approach of non-involvement in social interaction with reviewers and those leaving postings on UGC sites. Further research could be undertaken based on an active participation of the researcher in online forums and discussions on the online experience of attraction visitors, subject to ethical protocols.
- The development of service marketing models based on SERVQUAL, such as ATTRACTQUAL to examine visitor satisfaction and quality issues is discussed in Chapter 2, and this is an area that could benefit from further study across a wider sample of attractions. The use by attraction operators of the results of quality benchmarking schemes could be explored, and also their participation or non-participation, in the VAQAS scheme – a service that is intended to provide attractions with objective feedback and comments on the visitor experience at their attraction.

- The number of attractions that have closed and opened in the period 1998-2015 has been described, but there has been no attempt to see how this 'churn'[48] rate compares with other industries and particularly parts of the retail sector, where there may be some close comparisons to attractions that have a strong retail element. Is there a specific 'churn' rate for attractions of a particular type or ownership category that could be compared with geographical areas or industries?

In considering what could have been done differently, it may be that many of the smaller attractions would have preferred to have been sent a paper copy of the Phase 1 online survey, although it is not known whether or not this would have significantly increased the response rate, especially bearing in mind the relatively low response of Welsh attractions to the annual Visit Wales surveys. In-depth analyses of case examples might have been conducted, focusing on the feedback processes in a small number of specific attractions to gain a deeper understanding of how and why interaction processes around communication with visitors occur or do not. This would have extended insights into the topic under study. The exploration of online feedback emerged as a focus in Phase 3 of the research and Phases 1 and 2 helped to provide an operational context to visitor attraction awareness of marketing models, the visitor experience and feedback - this is what a conceptual framework needs to do - pull together the objectives to consider the overall aim of the study.

6.7 Implications for attraction operators

One key conclusion from this study with respect to Welsh visitor attractions' practice is that many attractions are not fully engaging in or maintaining a consistent approach to the co-creation of online visitor experience. The marketing potential of websites and UGC platforms in particular, are not being utilised to their full capabilities. The key points for attraction operators arising from this PhD thesis are therefore:

- Attractions should, as far as possible fully 'own' their online presence – TripAdvisor and Facebook pages should be adopted, made official and updated

[48] This is a term used especially in the retail sector, to describe a change in numbers in a specific group over a certain period. In this context, it relates to the number of attractions that have closed or new ones opened.

with the relevant attraction information. They should be used as interactive marketing channels to help develop dialogue with visitors as part of the co-creation of experience.

- UGC sites should be regularly monitored and any emerging negative coverage of issues relating to visitor experience, should be dealt with in a timely manner. This can be done by responding online and also by dealing with the physical or other elements of the problem at the attraction itself.

- A consistent approach should be adopted across all UGC channels, so that any one channel is not ignored completely, and details of the attraction are current and correct on all channels. This is a relatively quick and low-cost activity, yet could easily help potential visitors find the information they may need, for example opening times and prices.

- Even if attractions decide, for whatever reason not to use one of the channels available, for example by concentrating on Facebook instead of TripAdvisor, then that other channel should still be regularly monitored for negative comments and feedback, so that such issues can be dealt with, or online visitors re-assured that the matter has at least been acknowledged.

- Visitor attractions should make full use of the potential benefits of online technology to improve their websites for marketing purposes, by utilising cost-effective interactive features and online booking where relevant and possible.

- Online training modules are provided free by the Welsh Government through their BOSS scheme. All tourism businesses should be fully encouraged to use this resource to help develop their online profile and digital footprint.

- This PhD research has concentrated on only a selection of the online and digital channels available, but it should be noted that others are of course in existence, such as Instagram and Snapchat. New opportunities are also being developed and introduced in the fast-moving digital environment. As with all marketing channels, it may be that experimentation is needed to find the best one for the business at any one time. Information on the different channels is available from the Welsh Government's BOSS scheme, but there may also be a role here for attraction joint marketing schemes and tourism associations to identify and highlight local examples of good practice.

- Ideally attractions should seek to convert the 'detractors' and 'passives' of Markey *et al* (2009) into 'promoters' so that eWOM will help bring in new and repeat visitors to the attraction (Buhalis and Foerste, 2015).

Further research is required to understand why some attraction operators appear to be so reluctant to adopt the relatively inexpensive opportunities offered through Web 2.0 technologies and the many developing digital capabilities including social media and smartphone apps, or even to make use of the guidelines produced by BOSS, as shown in Table 6.1:

Table 6.1 Guidelines for developing a social media presence

Step 1	Listen before you speak – investigate what others are already saying about similar products
Step 2	Define your marketing objectives – social media has to tie in with your other marketing activity
Step 3	Prioritise your goals and objectives, and get to know your customers
Step 4	Claim your 'real estate' – you don't need to have a presence on every social media site, but find out which works for you. The key sites for business activity are Facebook, LinkedIn, Twitter' YouTube
Step 5	Participate actively – make a commitment to communicate regularly
Step 6	Optimise everything – use keywords across all social media activity
Step 7	Measure results – use your objectives to help determine what you should be measuring

(Source: https://businesswales.gov.uk/boss accessed 24/11/2017)

The cost of producing and distributing promotional leaflets that are still seen displayed in leaflet racks at many locations is huge when compared with the cost of managing the digital presence of an attraction. Many attractions still seem to be apathetic to the new communication opportunities, and inflexible in their marketing practices. They continue with the production of print materials, even though, by their own admission, for many, the cost effectiveness of those materials is often unknown. Opportunities for enhanced interaction with online visitors appear to be ignored. Even in Phase 1 of the research, an apparent indifference was displayed by a sizeable number of attraction operations in relation to unsuccessful attempts to make email contact. Further research is needed to understand the apathy and inflexibility of the practices that were observed. Although this PhD study focused on a supply-side perspective, it is recognised that additional research on the visitor (user) expectations of visitor attraction websites and the digital presence of attractions needs to happen in parallel in order to gain a more holistic analysis of the Welsh visitor attraction experience.

6.8 The research journey

In the early stages of this PhD study, the initial focus was on a study of the marketing process and its application in the context of Welsh visitor attractions. It sought to determine the extent to which the visitor attraction operators were aware of key marketing models and theories such as the extended marketing mix, segmentation, targeting and positioning. As part of this initial work, it was essential to carry out an examination of the Welsh visitor attraction sector, to ascertain its size, scope, and the nature of the visitor attractions operating in Wales. Once this baseline analysis had been completed, and as the literature review developed, the 'flavour' and focus of the research developed into further study of the visitor experience and how this was understood by attraction operators. Issues of 'quality', 'value' and measurement of the experience emerged as part of this, leading to study of the 'experiencescape'.

A major revision of the work from 2015 onwards led to a much more focused netnographic analysis of the co-creation of experience, based on the Welsh visitor attraction operators' interaction with visitors in the online environment of UGC on the social media sites Facebook and TripAdvisor. The Google listings for the 84 visitor attractions in the sample were also critically analysed, as were the attractions' own websites, using an appropriate scoring method that was developed specifically for this purpose. The result was that, whilst the initial context of examining the marketing process of Welsh visitor attractions remained valid, it was possible to provide a far more detailed review of the understanding of the visitor experience by operators, and their practices in relation to managing online communication and feedback. Thus, a picture was built up of the online marketing practices of Welsh visitor attractions.

It is found that the online co-creation of experience for Welsh visitor attractions is predominantly visitor-led and supply-side interaction is lacking, particularly in the feedback and communications process. Even where visitor attraction listings and business websites scored strongly in terms of rating scores this was sometimes incidental or fortuitous.

It is apparent that many Welsh visitor attraction operators are missing a key marketing opportunity to develop their online presence and exploit the interactive communication opportunities offered by Web 2.0 and social media. The findings contribute to a wider understanding of co-creation of experience and online interactions between suppliers and consumers in a tourism context. In particular, it may be emphasised that engagement with social media channels appears unproductive if online communications and feedback are not managed. The optimism of the Welsh Government about the future online activity of Welsh tourism businesses is not shared: "*the vision to 2020 is to bring a 'digital-first' culture not only to the heart of Visit Wales, but also to the centre of all Wales destination marketing activity and to the broader tourism industry"* (Welsh Government, 2016, p 13).

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APPENDIX 1

Visitor attractions meeting Visit Wales definition: 1998 and 2015

1998 list recreated by author	2015
Aberaeron Sea Aquarium/Coastal Voyages	1940s Swansea Bay
Aberconwy House	4 New York Cottages
Aberdulais Falls	Abbey Mill
Gelligroes Mill & Candle Workshop	Aber Valley Heritage Centre Museum
Abergavenny Museum	Aberaeron Coastal Voyages
Aberglasney Gardens	Aberconwy House
Aberystwyth Arts Centre	Aberdeunant Traditional Farmhouse
Aberystwyth Cliff Electric Railway	Aberdulais Falls
Afan Argoed Forest Park	Abergavenny Museum & Castle
Afonwen Craft and Antique Centre	Aberglasney Gardens
Alice in Wonderland Centre	Abertillery & District Museum
Alyn Waters Country Park Visitor Centre	Aberystwyth Arts Centre
Andrew Cotterill Furniture	Aberystwyth Cliff Electric Railway
Andrew Logan Museum of Sculpture	Aberystwyth Pier
Anglesey Angora Bunny Farm	Aberystwyth Uni, Art Gallery
Anglesey Bird World	Afan Forest Park Visitor Centre
Anglesey Countryside Centre	Afonwen Craft and Antique Centre
Anglesey Model Village and Gardens	Alice in Wonderland Centre
Anvil Pottery	Alyn Waters Country Park Visitor Centre
Aquadome, Afan Lido Leisure Complex	Amgueddfa Syr Henry Jones
Attic Gallery	Amlwch Heritage Centre
Avondale Glass	Andrew Logan Museum of Sculpture
Babell Chapel	Anglesey Countryside Centre
Bala Lake Railway	Anglesey Model Village and Gardens
Bangor Cathedral	Anglesey Sea Zoo
Barmouth Sailors' Institute	Antur Waunfawr
Barmouth Viaduct	Anvil Pottery
Barry Sidings Countryside Park	Avondale Glass
Beaumaris Castle	Bala Lake Railway
Beaumaris Gaol and Courthouse	Bangor Cathedral
Caernarfon Castle	Bangor Pier
Bedwellty House	Barmouth Sailors Institute
Begelly Pottery	Barry Island Railway Heritage Centre
Bersham Heritage Centre	Barry Sidings Countryside Park
Bersham Ironworks	Bay Island Voyages
Rollerdome	Beaumaris Castle
Betws-y-Coed Motor Museum	Beaumaris Court House
Blackmill Mill	Beaumaris Gaol
Blaenavon Community Heritage & Cordell Museum	Bedwellty House
Blue Ocean Adventure	Bersham Heritage Centre
Bodafon Farm Park	Betws-y-Coed Motor Museum

Bodelwyddan Castle	Big Pit: National Coal Museum
Bodnant Garden	Bishop's Wood Nature Reserve & Centre
Borth Animalarium	Black Mountain Centre
Bonsai Centre	Black Mountains Falconry Centre
Brambles	Blackpill Wildlife Centre
Brecknock Museum & Art Gallery	Blackpool Mill and Caves
Brecon Beacons Mountain Centre	Blaenavon Community Heritage & Cordell Museum
Brecon Cathedral and Heritage Centre	Blaenavon Ironworks
Brecon Mountain Railway	Blaenavon World Heritage Centre
Brickfield Pond	Blaina Museum & Heritage Centre
Britain's Smallest House	Bodafon Farm Park
Bro Meigan Gardens	Bodelwyddan Castle
Bryn Bach Park	Bodnant Garden
Bryn Bras Castle	Bodrhyddan Hall
Bryn Cerdin Working Dairy Farm	Borth Animalarium
Bryngarw Country Park	Borth Station Museum
The Old Mill	Brecknock Museum & Art Gallery
Brynkir Woollen Mill	Brecon Beacons Mountain Centre
Butetown History & Arts Centre	Brecon Beacons Waterfalls Centre
Castle Museum, Haverfordwest	Brecon Cathedral and Heritage Centre
Bwlch Nant yr Arian Visitor Centre	Brecon Mountain Railway
Amelia Trust Farm	Brickfield Pond
Cae Ddu Farm Park	Britain's Smallest House
Caernarfon Air World	Bro Meigan Gardens
Caerleon Roman Baths and Amphitheatre	Bronllys Castle
Beaumaris Marine World	Bryn Bach Park
Caernarfon Castle	Bryngarw Country Park
Caernarfon Maritime Museum	Brynmawr and District Museum
Caldey Island Boat Trips	Bryntail Lead Mine
Caerphilly Castle	Buckley Library, Museum & Gallery
Y Felin Flour Mill	Butetown History & Arts Centre
Canal Exhibition Centre	Bwlch Nant yr Arian Visitor Centre
Capel Betws Pony Centre & Farm Park	Cae Dai Trust Museum
Cardiff Bay Barrage	Cae Hir Gardens
Cardigan Bay Marine Wildlife Centre	Cae'r Gors
CC 2000	Caerau Uchaf Gardens, Bala
Cardigan Heritage Centre	Caerleon Roman Baths and Amphitheatre
Deeside Leisure Centre (Ice Rink)	Caernarfon Air World
Cardigan Island Coastal Farm Park	Caernarfon Castle
Carew Castle & Tidal Mill	Caernarfon Maritime Museum
Carmarthen Heritage Centre	Caerphilly Castle
Carmarthenshire County Museum	Caldey Island Boat Trips
Carreg Cennen Castle	Caldicot Castle
Castell Henllys Iron Age Fort	Cambrian Woolen Mill & Visitor Centre
Caws Cenarth - Welsh Cheese	Canolfan Cywain Centre

Cefn Coed Colliery Museum	Canolfan Ucheldre Centre
Cefn Mably Farm Park	Canolfan y Barcud - Kite Centre
Cefn Pottery	Canolfan Y Plase
Centre for Alternative Technology	Cantref Adventure Farm
Ceramic Café	CARAD Chronicles Community Museum
Ceredigion Museum	Cardiff Bay Barrage
Chapter Gallery	Cardiff Bay Road Train
Chepstow Castle	Cardiff Bay Visitor Centre
Chepstow Museum	Cardiff Boat Tours (Princess Katharine)
Cosmeston Medieval Village	Cardiff Castle
Chirk Castle	Cardiff Ghost Tour
Cyfely Farm Museum	Cardiff Sea Safaris
Clyne Gardens	Cardiff Story
Manorowen Walled Garden	Cardiff Visitor Centre
National Slate Museum	Cardiff Water Bus
Cochwillan Old Hall	Cardigan Bay Marine Wildlife Centre
Coed y Brenin Forest Park	Cardigan Island Coastal Farm Park
Hywel Dda Gardens & Interpretive Centre	Cardigan Town Museum
Colby Woodland Garden	Carew Castle & Tidal Mill
Coney Beach Pleasure Park	Carew Cheriton Control Tower
Colwyn Leisure Centre	Carmarthenshire County Museum
Conwy Butterfly Jungle	Carreg Cennen Castle
Conwy Castle	Cartref Garden
Conwy Falls	Castell Coch
Conwy Valley Railway Museum	Castell Henllys Iron Age Fort
Oceanarium	Castell y Gwynt Garden
Conwy Nature Reserve	Castle Museum, Haverfordwest
Conwy Suspension Bridge	Caws Cenarth - Welsh Cheese
Harlech Castle	CC 2000
Conwy Water Gardens	Cefn Caer
Conwy Butterfly Jungle	Cefn Coed Colliery Museum
Conwy Visitor Centre	Cefn Mably Farm Park
Rug Chapel	Centre for Alternative Technology
Corris Craft Centre	Ceredigion Museum
Corris Railway Museum	Challenge Wales Boat
Cosmeston Lakes Country Park	Chapter Gallery
Craig-y-Nos Country Park	Chepstow Castle
Rhossili Visitor Centre	Chepstow Museum
Cresselly	Chirk Castle
Curlew Weavers Woollen Mill	Chocolate Factory (The)
Cwm Derwen Woodland & Wildlife Centre	Cilgerran Castle (Cadw)
Cwm Pottery	City Sightseeing Llandudno & Conwy
Cwmcarn Forest Drive & Visitor Centre	City Sightseeing Tours
Cwmerchon Nature Park	Clerkenhill Farm Adventure Walk
Pembrokeshire Motor Museum	Clyne Gardens
Cyfarthfa Castle Museum	Clyne Valley Country Park

Cymer Abbey	Coed Llandegla Forest Visitor Centre
Cynon Valley Museum & Gallery	Coed Trallwm Mountain Bike Centre
Dale Sailing	Coed y Brenin Forest Park
Dare Valley Country Park	Coity Castle
Narrow Gauge Railway Museum	Colby Woodland Garden
Denbigh Castle	Coney Beach Pleasure Park
Folly Farm Adventure Park	Conwy Butterfly Jungle
Milford Haven Museum	Conwy Castle
Denbigh Library, Museum & Gallery	Conwy Falls
Dinas Reserve	Conwy Mussel Museum
Dinefwr Park	Conwy Nature Reserve
Dinosaur World	Conwy Suspension Bridge
Dolbadarn Castle	Conwy Valley Maze
Dolphin Survey Boat Trips	Conwy Valley Railway Museum
Dolwyddelan Castle	Conwy Water Gardens
Dwyfor Rabbit Farm	Corris Craft Centre
Dyfed Shires & Leisure Farm	Corris Railway Museum
Dyffryn Woollen Mill	Cosmeston Lakes Country Park
Dyffryn Gardens	Cosmeston Medieval Village
Dylan Thomas Boathouse	Cowbridge Physic Garden
Dyserth Waterfalls	Craig-y-Nos Country Park
Egypt Centre - Museum of Egyptian Antiquities	Criccieth Castle
Elan Valley Visitor Centre	Curlew Weavers Woollen Mill
Ellins Tower Seabird Centre	Cwm Derwen Woodland & Wildlife Centre
Elliot Colliery Winding House	Cwm Pottery
Elvet Woollen Mill	Cwmcarn Forest Drive & Visitor Centre
Erwood Station Craft Centre & Gallery	Cwmerchon Nature Park
Ewenny Pottery	Cyfarthfa Castle Museum
Ewe-Phoria	Cymer Abbey
Fairbourne and Barmouth Steam Railway	Cynon Valley Museum & Gallery
Farmworld	Dare Valley Country Park
Felin Geri Flour Mill	Denbigh Castle
Felin Crewi Working Water Mill	Denbigh Library, Museum and Art Gallery
Felinwynt Rainforest & Butterfly Centre	Devil's Bridge Waterfalls
Felin-y-Gors Fisheries	Dewstow Gardens
Neath Museum & Art Gallery	Dinas Reserve
Geographical & Folk Museum of N Wales	Dinefwr Castle
Ffestiniog Railway	Dinosaur World
Flint Castle	Dolaucothi Gold Mines
Flying Fish Cruises, Pembroke	Dolbadarn Castle
Foel Farm Park	Dolforwyn Castle
Fonmon Castle	Dolphin Survey Boat Trips
Forest Farm Country Park	Dolwyddelan Castle
Fourteen Locks Canal Centre	Dr Who Experience
Garwnant Visitor Centre	Dr Who Tour of Cardiff locations

Gelli Aur Country Park	Drenewydd Museum
Gillian Richardson Fine Art Photography	Dwyfor Rabbit Farm
Glansevern Hall Gardens	Dyfed Shires & Leisure Farm
Glyn yr Ynys	Dyffryn Gardens
Glyncornel Environmental Centre	Dyfi Furnace
National Library of Wales Exhibition Centre	Dylan Thomas Boathouse
Museum of Welsh Antiquities	Dylan Thomas Centre
Glynderi Pottery	Egypt Centre - Museum of Egyptian Antiquities
Glynn Vivian Art Gallery	Elan Valley Visitor Centre
Gnoll Estate	Electric Mountain
Gordon Miles Work Studio	Ellins Tower Seabird Centre
Gower Heritage Centre	Elliot Colliery Winding House
Goytre Wharf Heritage Activity & Study Centre	Erddig
Graig Gwladys Country Park	Erwood Station Craft Centre & Gallery
Great Aberystwyth Camera Obscura	Ewenny Pottery
Great Orme Mines	Ewe-Phoria
Great Orme Summit Complex	Fairbourne and Barmouth Steam Railway
Great Orme Tramway	Felin Cochwillan Watermill
Green Gallery (The)	Felinwynt Rainforest & Butterfly Centre
Greenacres Farm Park	Ffestiniog Railway
Greenfield Valley Heritage Park	Firing Line (in Cardiff Castle
Gwaynyog Country World, Denbigh	Flat Holm
Gwendraeth Miniature Railway	Flint Castle
GreenWood Forest Park	Foel Farm Park
Gwili Steam Railway	Folly Farm Adventure Park
Gwinllan Cwm Deri Vineyard	Folly Tower
Gwinllan Ffynnon Las Vineyard	Forest Farm Country Park
Gwydir Castle	Fourteen Locks Canal Centre
Gwydyr Uchaf Chapel	Garwnant Visitor Centre
Welsh Christian Heritage Centre	Gavin & Stacey Tours
Gwynedd Museum and Art Gallery	Gelli Aur Country Park
Hafod Gardens	Gelligaer Roman Fort
Handmade Paper	Gelligroes Mill & Candle Workshop
Parc Cwm Darren	Gilfach Nature Reserve & Visitor Centre
Hem Gopal	Gladstone Exhibition
Henllys Farm	Gladstone's Library Museum
Hill Court Gallery	Glansevern Hall Gardens
Hilton Court Gardens	Glasfryn Ospreys
Canolfan y Barcud - Kite Centre	Glasfryn Parc
Holyhead Breakwater Country Park	Glassblobbery
Celtica	Glyn Davies Gallery
Holywell Textile Mills	Glynn Vivian Art Gallery
Honey Bee Exhibition	Gnoll Estate
Horse Drawn Boat Trips	Goleulong 2000 Lightship
The Pottery	Gower Heritage Centre
Howell Harris Museum	Graig Gwladys Country Park

Tenby Museum & Art Gallery	Great Aberystwyth Camera Obscura
Inigo Jones Slateworks	Great Orme Country Park
International Bee Research Association	Great Orme Mines
John & Victoria Jewellery	Great Orme Summit Complex
John Hughes Pottery	Great Orme Tramway
Joys of Life Visitor Centre	Greenacres Farm Park
Judge's Lodging	Greenfield Valley Heritage Park
Kidwelly Castle	Greenmeadow Community Farm
King Arthur's Labyrinth	GreenWood Forest Park
King's Mill & Visitor Centre	Griffithstown Railway Museum
Knights Cavern	Grosmont Castle
Lamphey Bishop's Palace	Gwili Pottery
Laugharne Castle	Gwili Steam Railway
Landsker Visitor Centre	Gwinllan Cwm Deri Vineyard
Little Friends Farm	Gwydir Castle
Living Water, Betwys-y-Coed	Gwydir Chapel
Llanarth Pottery	Gwynedd Museum and Art Gallery
Llanberis Lake Railway	Gypsy Wood Park
Llancaiach Fawr Manor	Hafod Gardens
Llandaff Cathedral	Harlech Castle
Oriel Tegfryn Gallery	Harlequin Puppet Theatre
Llandegfedd Farm Park	Haulfre Gardens & Stables
Llandegfedd Reservoir	Haverfordwest Priory
Llandudno Cable Car	Haverfordwest Town Museum
Llandudno Museum	Heatherton Country Sports Park
Llanerch Vineyard Tours	Hen Gwrt
Llanfair Caverns	Hergest Croft Gardens
Llangar Old Parish Church	Hilton Court Gardens
Llangedwyn Mill	Holyhead Breakwater Country Park
Llangloffan Farmhouse Cheese Centre	Holyhead Maritime Museum
Llangollen Motor Museum	Horse Drawn Boat Trips
Llangollen Railway	Howell Harris Museum
Llanerchaeron	Hywel Dda Gardens & Interpretive Centre
Llantarnam Grange Arts Centre	Inigo Jones Slateworks
Llanyrafon Mill	Insole Court
Llanidloes Museum	Internal Fire, Museum of Power
Llawhaden Castle	International Bee Research Association
Llechwedd Slate Caverns	Jen Jones Welsh Quilt Centre
Lleyn Historical & Maritime Museum	Joseph Parry's Ironworkers Cottage
Lloyd George Museum	Joys of Life Visitor Centre
Llyn Brenig Visitor Centre	Judge's Lodging
Llynnon Mill	Kate Roberts Heritage Museum
Llynon Windmill, Ynys Mon	Kidwelly Castle
Llys Llywellyn Countryside Centre	Kidwelly Industrial Museum
Old Country Life Museum	King Arthur's Labyrinth
Llysyfran Country Park	Kymin (The)
Llywernog Silver Lead Mine	Lake Vyrnwy Visitor Centre

Loggerheads Country Park	Lakeside Farm Park
Lower Dee Exhibition Centre	Lamphey Bishop's Palace
Manorbier Castle	Laugharne Castle
Madog Motor Museum	Llanarth Pottery
Margam Stones Museum	Llanberis Lake Railway
Marston Pottery	Llancaiach Fawr Manor
Mawdach Valley RSPB Nature Reserve	Llandaff Cathedral
Meirion Mill	Llandegfedd Reservoir
Melin Tregwynt	Llandudno Cable Car
Menai Strait Cruises	Llandudno Museum
Mill House	Llandudno Pier
Millennium Stadium Tours	Llanerch Vineyard Tours
Minera Country Park	Llanerchaeron
Mission Gallery	Llanfair Caverns
Model Aircraft Exhibition	Llanfihangel Court Garden
Moel Famau Country Park	Llanfyllin Workhouse
Mold Library Museum & Art Gallery	Llangar Old Church
Monmouth Museum	Llangedwyn Mill
Monnow Valley Vineyard	Llangollen Motor Museum
Montgomery Canal Cruises	Llangollen Museum of Local History
European Centre for Traditional and Regional Cultures	Llangollen Railway
Moors Farm	Llanidloes Museum
Museum of Childhood	Llanrwst Almshouses
St David's Visitor Centre	Llanthony Priory
Rhuddlan Castle	Llanymynech Wharf Visitor Centre
Museum of Modern Art	Llanyrafon Manor
National Showcaves Centre for Wales	Llanyrafon Mill
Museum of the Home	Llawhaden Castle
Nant y Pandy/Dingle Nature Reserve	Llechwedd Slate Caverns
Nant Mill Visitor Centre	Lleyn Historical & Maritime Museum
Narberth Museum	Lloyd George Museum
National Ice Rink Centre	Llyn Brenig Rservoir & Visitor Centre
Nat Mus.& Galleries of Wales Collection Centre	Llyn Brenig Visitor Centre
White Castle	Llyn Llech Owain Country Park
Cardiff Bay Visitor Centre	Llynnon Mill
Blackpool Mill and Caves	Llys Ednowain Heritage Centre
Wrexham Arts Centre	Llys Llywellyn Countryside Centre
National Wool Museum	Llysyfran Reservoir Country Park
Natural History Museum	Llywernog Silver Lead Mine
Neath Abbey	Loggerheads Country Park
Neath Canal Boat Trips	Loughor Castle
Criccieth Castle	Machinations
Neuadd Goffa Ceiriog	Madog Motor Museum
New Quay Boat Trips	Magic of Life Butterfly House
New Quay Honey Farm	Manor House Wildlife Park
Newport Museum & Art Gallery	Manorbier Castle

Newport Centre	Manorowen Walled Garden
Newton House	Margam Country Park
Noah's Ark	Margam Stones Museum
Norwood Gardens	Mawdach Valley RSPB Nature Reserve
St Davids Cathedral	Melin Tregwynt
Nova	Menai Strait Cruises
Ocean Beach Amusement Park	Merlins Hill Centre
Offa's Dyke Centre	Milford Haven Museum
Offa's Vineyard	Millennium Stadium Tours
Old Bell Museum	Minera Country Park & Iron Works
Old Cilgwyn Gardens	Minera Lead Mines
Old Station	Model House Craft & Design Centre
Oriel Davies Gallery	Moel Famau Country Park
Oriel Mostyn Gallery	Moelfre Seawatch
Oriel Plas Glan y Weddw Art Gallery	Mold Library Museum & Art Gallery
Oriel Ynys Mon	Monmouth Castle & Regimental Museum
Owl Sanctuary	Monmouth Museum
Oxwich Castle	Montgomery Canal Cruises
Oystermouth Castle	Montgomery Castle
Bronze Bell Collection (Sailors Institute)	Moss Valley Country Park
Padarn Country Park	Mumbles Pier
Pant y Saes Fen	Museum of Modern Art
Parc Glynllifon	Museum of Speed
Parc Henblas Park	Museum of Welsh Cricket
Parc Newborough	Nant Gwrtheyrn Heritage Centre
Parva Farm Vineyard	Nant Mill Visitor Centre
Pembrey Country Park	Nant y Pandy/Dingle Nature Reserve
Pembroke Castle	Nantclwyd-Y-Dre
Penarth Fawr Medieval House & Gallery	Nantgarw China Works Museum
Monmouth Castle & Regimental Museum	Narberth Museum
Ynysangharad Memorial Park	Narrow Gauge Railway Museum
Penhow Castle	National Assembly Debating Chamber
Gwili Pottery	National Botanic Garden of Wales
Penmachno Woollen Mill	National Coracle Centre & Flour Mill
Penmaenpool Centre	National Cycle Collection
Penrallt	National Library of Wales Exhibition Centre
Stepaside Craft Village	National Museum Wales
Penscynor Wildlife Park	National Roman Legion Museum
Pensychnant Nature Cons. Centre & N.Reserve	National Showcaves Centre for Wales
Picton Castle & Woodland Gardens	National Slate Museum
Piggery Pottery	National Waterfront Museum
Plantasia	National Wool Museum
Plas Coch Garden Zoo	Neath Abbey
Plas Arthur Leisure Centre	Neath Canal Boat Trips
Plas Mawr Elizabethan Town House	Neuadd Goffa Ceiriog
Plas Newydd	New Quay Boat Trips
Pleasure Steamers Waverley & Balmoral	New Quay Honey Farm

Pontneddfechan Waterfalls	Newcastle
Pontypool & Blaenavon Railway	Newport Castle
Pontypool Museum	Newport Museum & Art Gallery
Pontypridd Museum	Newport Transporter Bridge Visitor Centre
Porthcawl Museum	Newport Wetlands Enviromental, Educational & visitor Centre
Porthkerry Country Park	Newton House, Dinefwr Park
Porthmadog Maritime Museum	Newtown Textile Museum
Portmeirion	North Wales Visitor Centre
Pottery	Norwegian Church
Powis Castle & Garden	Norwood Gardens
Powysland Museum & Montgomery Canal C'tr	Oakwood
Puffin Island Cruise	Offa's Dyke Centre
Devil's Bridge Waterfalls	Old Bell Museum
Vale of Rheidol Railway	Old Cilgwyn Gardens
Quaker Heritage Centre	Old Station
Quarry Hospital Visitor Centre	Oriel Davies Gallery
Melin Moelwyn	Oriel Mostyn Gallery
Rhyl Suncentre	Oriel Myrddin Gallery
Quasar Centre	Oriel Plas Glyn-Y-Weddw
Queen Victoria Passenger Boat	Oriel Tegfryn Gallery
Radnorshire Museum	Oriel Y Parc
Rare Breeds Farm	Oriel Ynys Mon
Red Kite Feeding	Owl Sanctuary, Ebbw vale
Reg Mus 1st the Queen's Dragoon Guards	Oxwich Castle
Rhayader & District Museum	Oystermouth Castle
Rheidol Hydro Electric Power Station	Padarn Country Park
Rhondda Heritage Park	Pant y Saes Fen
Rhyl Library, Museum & Arts Centre	Parc Cwm Darren
Rhyl Miniature Railway	Parc Glynllifon
Riverside Chocolate House	Parc Henblas Park
RNLI Museum	Parc Howard Museum and Art Gallery
Robert Owen Memorial Museum	Parc le Breos
National Museum Cardiff	Parc Tondu Victorian Ironworks
Rock Park Spa Centre	Park Hall Countryside Experience
Royal International Pavilion	Parva Farm Vineyard
Royal Regiment of Wales Museum (Cardiff) of the Welch Regiment (41st/69th Foot)	Pembrey Country Park
Royal Welch Fusiliers Regimental Museum	Pembroke Castle
Ruthin Craft Centre Gallery	Pembroke Dock Museum
Ruthin Gaol	Pembrokeshire Candle Centre & Museum
Model House Craft & Design Centre	Pembrokeshire Motor Museum
Scolton Manor House & Country Park	Pen y Ffrith Bird Gardens
Segontium Roman Museum	Penarth Fawr Medieval House & Gallery
Seion Weaving Centre, Llanberis	Penarth Vineyard
Rhiannon Welsh Gold Centre	Penderyn Distillery
Anglesey Sea Zoo	Penlan Uchaf Gardens
Sevensprings Trout Farm	Penmaenpool Centre

Shearwater Safari	Penmon Priory
Shell Island	Penrhos Cottage
Silent World Aquarium & Reptile Collection	Penrhyn Castle
Sir Henry Jones Museum	Pensychnant Nature Conservation Centre & Nature Reserve
Sirhowy Valley Country Park	Pentre Bach Ni
Siwan Woollen Mill	Pentre Ifan
Skomer Island National Nature Reserve	Phoenix Bowl
Sky Tower	Picton Castle & Woodland Gardens
Slate Workshop	Piggery Pottery
Small World Pony Centre	Pili Palas
Heron's Brook Animal Park	Pistyll Rhaeadr Waterfalls
Snowdon Honey Farm	Plantasia
Snowdon Mountain Railway	Plas Brondanw Gardens
Solva Woollen Mill	Plas Mawr Elizabethan Town House
South Stack Lighthouse	Plas Newydd
South Wales Miners' Museum	Plas Newydd, Llangollen
St Asaph Cathedral	Plas Tan y Bwlch Gardens
St Davids Farm Park	Plas-yn-Rhiw
St Donats Art Centre	Pont Cych Mill
St Florence Cheese	Pontypool & Blaenavon Railway
Tywyn Pottery	Pontypool Museum
Stone Science	Pontypridd Museum
Stoney Park Weavers, Stepaside	Porthcawl Museum
Strata Florida Abbey	Porthkerry Country Park
Stryt Las Country Park	Porthmadog Maritime Museum
Brimstone Widlife Centre	Portmeirion
Stuart Crystal Visitor Centre	Powis Castle & Garden
Studio in the Church	Powysland Museum & Montgomery Canal C'tr
Swansea Leisure Centre	Puffin Island Cruise
Talley Abbey	Quaker Heritage Centre
Swansea Museum	Quarry Hospital Visitor Centre
Swansea Vale Railway	Quasar Centre, Barry
Sygun Copper Mine	Queen Victoria Passenger Boat, Conwy
Taliesin Arts Centre: Ceri Richards Gallery	Radnorshire Museum
Tal-y-Waen Farm	Raglan Castle
Tan-y-Mynydd Trout Lakes	Rare Breeds Farm
Oriel Myrddin Gallery	Red Kite Feeding Centre
Teapot World	Rheidol Hydro Electric Power Station
Techniquest	Rhiannon Welsh Gold Centre
Teifi Valley Railway	Rhondda Heritage Park
Greenfield Valley Museum	Rhossili Visitor Centre
The Dinosaur Park	Rhuddlan Castle
The Honorwood Flocks	Rhyl Library, Museum & Arts Centre
The Nelson Museum & Local History Centre	Rhyl Miniature Railway
The Pit Pony Sanctuary	Rhyl Seaquarium
Royal Cambrian Academy of Art	River Tawe Boat Trips

The Ugly House	Riverside Chocolate House
The Welsh Chocolate Farm	RNLI Boathouse
Tintern Abbey	Robert Owen Memorial Museum
Trawsfynydd Power Station & Visitor Centre	Rock Mills Woollen Mill & Water Mill
Trefeinon Open Farm	Royal Cambrian Academy of Art
Trefrifawr Farm Trail	Royal International Pavilion
Trefriw Wells Spa	Royal Welch Fusiliers Regimental Museum
Tregaron Pottery	RSPB Cwm Clydach Nature Reserve
Trer Ddol Museum	RSPB Lake Vyrnwy Nature Reserve
Tretower Court & Castle	Rug Chapel
Tri Thy Craft and Needlework Centre	Ruthin Craft Centre Gallery
Turner House Gallery	Ruthin Gaol
Tudor Merchant's House	S Wales Uni Art Collection
Ty Mawr Wybrnant	Scolton Manor
Ty Mawr Country Park Visitor Centre	Segontium Roman Museum
Ty'n-y-Coed Uchaf	Senedd-Dy Owain Glyndwr
Newtown Textile Museum	Shared Earth Trust, Denmark Farm
Upton Castle Gardens	Shearwater Safari
Usk Castle	Shell Island
Usk Rural Life Museum	Sir Henry Jones Museum
Valle Crucis Abbey	Sirhowy Ironworks
Victorian School of the 3 R's & Heritage Centre	Skenfrith Castle
Voyages of Discovery	Skomer Island National Nature Reserve
Welsh Distillers Visitor Centre	Snowdon Honey Farm
Welsh Hawking Centre & Wildlife Park	Snowdon Mill Art & Craft Centre
Welsh Industrial & Maritime Museum	Snowdon Mountain Railway
Welsh Industrial and Maritime Museum, Cardiff	Solva Woollen Mill
Welsh Mountain Zoo	South Stack Lighthouse
National Roman Legion Museum	South Wales Miners' Museum
Welsh Porcelain	Spaceguard Centre
Welsh Highland Railway	St Asaph Cathedral
Welsh Royal Crystal	St Davids Bishops Palace
Welsh Wildlife Centre	St Davids Cathedral
Welshpool & Llanfair Light Railway	St David's Visitor Centre
Wernddu Vineyard	St Dogmael's Abbey
Nantgarw China Works Museum	St Donats Arts Centre
West Wales Eco Centre	St Fagans: National History Museum
Wolfscastle Pottery	St Winefride's Well
Nant-y-Coy Mill	Stackpole Gardens & Visitor Centre
Worthenbury Wines	Stone Science
Weobley Castle	Strata Florida Abbey
Ynysfach Iron Heritage Centre	Stuart Crystal Visitor Centre (Welsh Royal)
Wrexham County Borough Museum	Sugar Loaf Vineyard
WWT National Wetland Centre Wales	Swallow Falls
Wyeside Arts Centre	Swansea Castle
Wylfa Power Station Information Centre	Swansea Museum

Ynys Hir Reserve Information Centre	Swtan
Coity Castle	Sygun Copper Mine
Erddig	Tacla Taid transport museum
Pili Palas	Taliesin Arts Centre: Ceri Richards Gallery
Tyn Llyn Crafts & Farm Museum	Talyllyn Railway
Swallow Falls	Techniquest
The Royal Regiment of Wales Museum	Techniquest @ NEWI
Swansea Maritime & Industrial Museum	Tedegar Local History Museum
Aberdeunant Traditional Farmhouse	Teifi Valley Railway
Cowbridge & District Museum	Tenby Museum & Art Gallery
Barry Island Railway Heritage Centre	Terror Tombs
Caldicot Castle	The Amlwch Industrial Heritage Trust
Harlequin Puppet Theatre	The Black Mountain Centre
Cambrian Mill & Heritage Centre (The Wonderful World of Welsh Wool)	The Dinosaur Park
Country Works Gallery	The Flying Boat Centre
Ffestiniog Hydro Centre	The Fun Centre
Glantraeth Children's Animal Park	The Garden House
Veteran Horse Society	The Hall @ Abbeycwmhir
Grove Land Adventure World	The Home Front Experience
Marine Lake Leisure Park	The Honorwood Flocks
Lake Vyrnwy Visitor Centre	The LC2
Margam Country Park	The Martello Tower (Guntower)
National Coracle Centre & Flour Mill	The Narrow Guage Railway Museum
Ocean Lab	The Nelson Museum & Local History Centre
Drenewydd Museum	The Old Market Hall
Pembrokeshire Sheepdogs	The Old Smithy Crafts & Heritage Centre
Plas-yn-Rhiw	The Pit Pony Sanctuary
Red Kite Feeding Centre	The Regimental Museum of the Royal Welsh
Singleton Park & Botanical Gardens	The Tramshed
Rock Mills Woollen Mill & Water Mill	The Ugly House
Selvedge Farm Museum	Thomas Shop, Maesyfed
Thousand Islands Expeditions	Thousand Islands Expeditions
Trapp Arts & Crafts Centre	Tintern Abbey
Tredegar House	Tir Prince Fun Park
Senedd-Dy Owain Glyndwr	Toll House
Griffithstown Railway Museum	Trawsfynydd Power Station & Visitor Centre
Leech Farm	Tre’r Cewri
Talyllyn Railway	Tredegar House
Llyn Llech Owain Country Park	Trefriw Wells Spa
The Old Smithy Crafts & Heritage Centre	Trefriw Woollen Mills
Welsh Bird of Prey Centre	Tretower Court & Castle
James Pringle Weavers	Tri Thy Craft and Needlework Centre
Afandale Pottery, Cymmer	Tudor Merchant's House
Scolton Manor Museum	Turner House Gallery
Black Mountain Gallery	Ty Ebbw Fach

Sirhowy Ironworks	Ty Gwyn & Ty Crwn
Castell Coch	Ty Mawr Country Park Visitor Centre
Ffrith Beach Entertainment Centre	Ty Mawr Wybrnant
Stammers Gardens	Tyddyn Mon
Canolfan Y Plase	Upton Castle Gardens
Stepaside Heritage Park, Narberth	Usk Castle
Penrhos Cottage	Usk Rural Life Museum
Welsh Highland Railway (Caernarfon)	Vale of Rheidol Railway
Aberystwth Yesterday	Valle Crucis Abbey
Bridgend Recreation Centre	Vaynol Estate
Clerkenhill Farm Adventure Walk	Veddw House Garden
Haverfordwest Town Museum	Voyages of Discovery
Bryntirion Working Farm	W H Smith Museum
Bunny Farm	Wales Ape and Monkey Sanctuary
Antur Waunfawr	Wales Area Fire Engine Restoration Society
Holywell Leisure Centre Giant Waterslide	Wales Millennium Centre
Joseph Parry's Ironworkers Cottage	Walled Garden at Pigeonsford
Kidwelly Industrial Museum	Warren Mill Farm Park
Museum of Speed	Welsh Bird of Prey Centre
The Home Front Experience	Welsh Christian Heritage Centre
Plas Newydd	Welsh Hawking Centre & Wildlife Park
St Davids Bishops Palace	Welsh Highland Heritage Railway
Bangor Pier	Welsh Highland Railway
Trefriw Woollen Mills	Welsh Mountain Zoo and Botanical Gardens
Stuart Crystal Glassworks	Welsh Porcelain
Trebinshwn House	Welsh Royal Crystal
Walled Garden at Pigeonsford	Welsh Wildlife Centre
The Garden House	Welshpool & Llanfair Light Railway
Bodvel Hall Adventure Park	Weobley Castle
Gilfach Nature Reserve & Visitor Centre	Wepre Country Park
Moss Valley Country Park	West Wales Eco Centre
Dolaucothi Gold Mines	West Wales Museum of Childhood
Minera Lead Mines	White Castle
Rhyl Seaquarium	Winding House Museum
Inwood (Woodcarving)	Wolfscastle Pottery
Canolfan Ucheldre Centre	World of Boats
Wepre Country Park	Wrexham County Borough Museum
Warren Mill Farm Park	WWT National Wetland Centre Wales
Raglan Castle	Wyndcliffe Court Sculpture Garden
Cardiff Castle	Ynys Hir Reserve Information Centre
National Cycle Collection	
Water Folk Canal Centre	
Pembrokeshire Candle Centre & Museum	
Snowdon Mill Art & Craft Centre	
Seven Sisters Museum and Sawmills	
Heatherton Country Sports Park	

Manor House Wildlife & Leisure Park	
W H Smith Museum	
Cilgerran Castle	
Claypits Pottery	
Blaenavon Ironworks	
Oakwood	
St Fagans: National History Museum	
Parc Howard Museum and Art Gallery	
Moelfre Seawatch	
Gower Farm Centre	
Penlan Uchaf Gardens	
Greenmeadow Community Farm	
Big Pit	
Dylan Thomas Centre	
Electric Mountain	
Dyfi Furnace	
Wales Aircraft Museum	
Penrhyn Castle	
Barry Island Pleasure Park	

Appendix 2: Phase 2 online questionnaire

E-survey questions – Visitor attraction marketing in Wales

This survey is being conducted as part of my independent doctoral research project at the University of Wales Trinity Saint David. Please cooperate by answering some questions about marketing and the visitor experience at your attraction. All responses will be anonymous or strictly confidential and no names of participants or attractions will be published. I will be happy to share the results with you when they are completed. Please email me if you have any queries about the survey: huw.thomas@sm.uwtsd.ac.uk

Thank you / diolch. Huw Thomas

1. Type of attraction: Historic building or castle ☐ Museum ☐ Art gallery ☐ Gardens ☐ Farm attraction ☐ Activity related ☐ Other ☐ Please describe ……………………
2. In which part of Wales is your attraction: S West ☐ S East ☐ N East ☐ N West ☐ Mid Wales ☐
3. In which year did your attraction first open to the public ………..
4. Please give the approximate number of visitors per year ………..
5. Do you have an admission charge YES / NO
6. What is (are) your main source(s) of funding? Please tick all that apply:

Admission charge ☐ Endowment or trust fund ☐ Donations ☐ Grant ☐ Other ☐ please explain:

7. Which of the above is the most significant for the attraction?

8. What is the main reason your attraction is open to the public - please rank the following in order of importance to you (1 = most important; 6 = least important):

To provide something interesting for people to see ☐ As a business to make money ☐
To make a special feature or collection open to the public ☐ It's a lifestyle choice
We had to do something with the buildings ☐ Other ☐ … please explain:

9. Thinking of your main marketing activities, please rank the following in order of importance to you in getting new visitors (1 = most important; 10 = least important):

Method/media	**Ranking**		**Ranking**
Leaflet		Word of Mouth	
Own website		Roadsigns	
Third party website		Paid advertising	
Facebook		Media coverage	
Twitter		Other (please explain below	

Other:

10. What do you think is the main reason that visitors come to your attraction (tick one) :

To see something different ☐ Entertain the children ☐ Educational ☐ Saw the road signs ☐ Came with friends or family ☐ Heritage or culture ☐ Been before ☐ Other ☐

If Other, please explain:

11. Following your reply to Q 7, how would **you** describe the specific experience that you are aiming to provide for visitors at the attraction:

12. Do you think that there is sometimes a difference between the experience that you are trying to offer (Q8) and the reasons that visitors may give for visiting (Q7)? YES / NO. If YES, please try and explain why you think this may happen:

13. In what ways do you seek to get information from visitors about their experience at your attraction (please tick all that apply)

Visitor comments book ☐ Informal feedback from visitors to staff ☐ Mystery shopper ☐ Tripadvisor comments ☐ VAQAS scheme ☐ Other ☐ … please explain:

14. Have you ever offered something unexpected or additional to visitors that may add value to their visit? YES / NO If 'YES' please describe what it is/was:

15. Do you use examples of the visitor experience in your promotional material: e.g pictures of visitors at the attraction ☐ Quotes from visitors ☐ Other ☐ … please explain:

16. Are there things that visitors sometimes ask for that you do not currently provide? Please explain:

17. What do you think are the biggest challenges facing your attraction in the next 5 years?
Competition from others ☐ Lack of funding ☐ Changes in leisure patterns ☐
Other ☐ …please explain:

18. Are you currently planning any developments or improvements at your attraction that may change the visitor experience? YES / NO / Not at present. Please give brief details to support your answer:

The next few questions are about you and your marketing experience.

19. Do you have any educational qualifications in tourism, business or marketing?
YES / NO If 'YES', what are they …………………………………………………

20. How have you built up your understanding of marketing (please tick all that apply):

Seminars	☐	Short course	☐	Advice from friends/colleagues	☐
Online searches	☐	Advice from consultants	☐	Trial and error ☐ Other	☐

21. Do you know what is meant by the marketing mix and how it applies to your attraction?
YES / NO / Not sure

22. Have you identified your primary market segment(s) YES / NO / Not sure
If 'YES' or 'Not sure', please describe it (them):

23. Do you know what is meant by STP (segmentation, targeting and positioning):

YES / NO / Not sure

24. If YES or Not sure, can you describe briefly how it applies to your attraction:

25. Is your attraction in the VAQAS scheme (currently or previously) YES / NO

If 'NO', why have you not taken part? :

Finally, thinking about the management of your attraction, please answer the following questions on a scale of 1-5, where 1 is strongly agree and 5 is strongly disagree (tick the relevant box on the scale for each statement):

	1	2	3	4	5
26.We have sufficient marketing expertise to get visitors to this attraction					
27.Visitors' motivation for coming to this attraction are fully understood					
28.Visitors usually get more than they expected from their visit					
29.It's not important to measure the quality of visitor experience					
30.We regularly read what's written in the visitor comments book					
31.Comments on Tripadvisor or websites about this attraction are read regularly					
32.We regularly respond to comments on Tripadvisor or websites about the attraction					
33.Comparing this attraction's performance with others is important to us					
34.We try to incorporate examples of the visitor experience into promotional material					
35.There may sometimes be a gap between what visitors expect before they come, and the actual experience they get					
36.Major changes or improvements to the attraction are planned to happen within the next 3 years					
37.The VAQAS scheme is a useful tool for giving feedback on facilities					
38.It is difficult to get the funding for improvements to the attraction					

39. What is your marketing spend per year as an approximate percentage of turnover:

0-5% ☐ 6-10% ☐ 11-15% ☐ 16-20% ☐ 21-30% ☐ over 30% ☐ Don't know ☐

40. Do you have any final comments about the marketing of your attraction or visitor attractions in general:

If you would like to receive a copy of the results, please provide the following:

email address: Your name:

Job title or position: Name of attraction:

Thank you for your cooperation and assistance in completing this survey.

Appendix 3 Scoping analysis of promotional activity of attractions.

Attraction	Leaflet	Website	Facebook	TripAdvisor	Recent TripAdvisor comments
A	Yes, images of attraction	Good, with colourful images of attraction	Basic presence but up to date with events info	Good pics. 103 visitor reviews, mostly excellent or very good	Great Santa experience; nice place but bit pricey
B	Yes, images of attraction and plenty of information	Very good, comprehensive and detailed	Very detailed presence with current information and pictures of visitors at events	Good pics. 125 reviews, mostly excellent or very good	Beautiful gardens; great day out & good food; disappointed visitor to tea room
C	Basic but good	Detailed, plenty of information linked to archives	Very basic presence, address incomplete	Good pics. 96 reviews, mostly excellent or very good.	Good compact interesting museum
D	Simple, has details to help visit	Basic but has main details.	Basic, last pic from attraction Aug 2011	Pics could be better. 62 reviews, excellent or very good	Unique tranquil hidden castle; negative comment about dog near entrance
E	Clear depiction of what to expect.	Comprehensive and detailed, very good	Basic presence, 125 likes, 174 visits	160 reviews, mostly excellent or very good	Informative, interesting & worth a visit, but 2 negatives – avoid, waste of time
F	Clear depiction of what to expect.	Comprehensive and detailed, very good	Very good, current. 1,564 likes, 301 visits	346 reviews, mostly excellent or very good, some disappointed with experience	Great experience; disappointed. Response to some comments.
G	Clear depiction of what to expect.	Comprehensive and detailed, very good	Very good, current. 566 likes, 57 visits	16 reviews, mostly excellent or very good.	Gem of a museum
H	No leaflet obtained	Comprehensive, has all info to plan a visit	Very good, current. 1,549 likes, 2,182 visits.	68 reviews, excellent, very good or average	Surprisingly good; misleading underground experience; ok but don't bother with the food
I	Very colourful, clear idea of what to expecet	Comprehensive, has all info to plan a visit	292 likes, 1,839 visits, basic presence	163 reviews, excellent, very good or average	Lots to do for little ones; scandalous – one member of staff rude
J	No leaflet obtained	Comprehensive, has all info to plan a visit	435 likes, 3,740 visits, very basic presence	73 reviews, mostly excellent or very good.	Response from operator to comments
K	Informative with visitor details	Good, biased towards retail side but all info there to plan a visit	2 sites – one basic16 likes, 319 visits; other 1,574 friends. Comprehensive and well developed site	58 reviews, excellent, very good or average	Response from operator to comments

L	Basic but adequate description of what to expect	Basic in design but plenty of links to further information	369 likes, 26 visits. Comprehensive and well developed site	26 reviews, excellent and very good, 2 terrible	Response from operator to comments
M	No leaflet obtained	Comprehensive, has all info to plan a visit and learn about other elements	27,401 likes. Comprehensive and well developed site	209 reviews Excellent to terrible	No response from operator. Fabulous day out; sadly a waste of time.
N	No leaflet obtained	Basic in design but all visitor info presented	353 likes, 26 visits. Comprehensive and well developed site	27 reviews, mostly excellent or very good, 1 terrible	No response. Most poor comments linked to car parking on event days
O	Basic but adequate description of what to expect	Basic in design but all visitor info presented	No Facebook presence	24 reviews, excellent or very good	Ok for a small museum was only negative comment
P	No leaflet obtained.	Basic design, not clear what to expect on site	1 like, 24 visits. Very basic presence	4 reviews, but 3 were for on site B&B	Nice little walk with great views (2013)

Appendix 4 Transcripts and coding analysis of semi-structured interviews (Phase 2)

My name is Huw Thomas and I am undertaking research for my PhD into visitor experience and the marketing of visitor attractions. During the last 6 weeks I have sent out emails to all attractions in Wales with a link to an on online survey. Some of the results are confidential, so I don't know all the respondents - have you taken part in the survey yet? If not, can I send you the link – please give me your email.

Can you spare some time to answer a few questions about visitor experience and marketing at your attraction - all responses will be strictly confidential and no names of participants or attractions will ever be published. I will be happy to share the results with you when they are completed. If its ok can I record this interview, simply to help me with my notes?

Topic (and colour used for coding)	**Prompts**
1.What are your main promotional or marketing activities?	Leaflets, website, social media. How important are each of these to you.
2. Would you feel that you have sufficient marketing expertise necessary to get visitors to your attraction? (Any yes/no answers were followed by the prompts opposite)	Do you know what is meant by the marketing mix, and can you describe how you use it? What are your primary market segments? What could be done to help you with marketing your attraction? Is there a role for Visit Wales or local tourism organisations?
3. To what extent do you think about visitors' motivation or reason for coming to your attraction?	Why do they visit, and how does this influence your marketing activities?
4. In what ways do you consider or plan the visitor experience?	This may involve special theming or other ways to add value or get visitors to engage with your attraction
5. Do you incorporate any aspects of the visitor experience into you promotional or marketing activities?	Can you describe the key images and messages that you use in your promotional activity
6. How do you measure quality of visitor experience?	Do you have a visitor comments book? Do you use benchmarks or schemes such as VAQAS or mystery shopper or TripAdvisor? What is your opinion of these? In what ways do you incorporate visitor feedback into your planning?
7. How aware are you of any gap between why visitors come – their expectations, and the actual visitor experience that they may get	Are visitors disappointed with any aspect of their visit? Have they been pleasantly surprised by something unexpected? What do they take pictures of? What story do they tell their friends about your attraction?
Any other comments you'd like to make	

Transcripts of interviews

These transcripts have had some basic editing to remove the interviewer's questions and comments, since in all cases the script was followed. Additional non-relevant comments during introductory conversation and finishing remarks have also not been included unless specifically relevant (see 'other comments' in transcripts) as they were considered not directly relevant to the main theme and direction of the research. Different colours were used for the coding of answers, using the topics 1-7 shown above.

Gardens, privately owned, small-medium South East Wales

We use Facebook a great deal and try to keep it as up-to-date as we can. We do have a leaflet and try and get it distributed but as a small attraction we have very limited funds for marketing and advertising. Families are our main visitors but it varies a lot, especially at different times of the year and depending on what's on and the weather. We have Christmas events this December for example.

We tend to keep an eye on what others are doing for marketing but with only small amounts available its mostly a case of what we think we can afford to do. Further help would be good but I'm not sure if we'd have the time to be able to leave the attraction to go to anything if it was held a long way away.

Gardens - people come to see the gardens, but that's what we have here and that's what people hear about. We try to improve year on year on what we do and what we offer to visitors and that's how we carry on. We show pictures of the gardens and grottos and have information on the website about the history of the site. People come to see the gardens but we do arrange events and put the details on the website and Facebook.

We have a visitor comments book that we monitor and also look at comments on TripAdvisor. Yes, as a small attraction we can talk to visitors and usually get a clear feeling that they've enjoyed their visit.

The grottos – visitors sometimes don't expect those and it's usually a surprise that they like and enjoy. It's difficult to explain these to people before they come – you need to see them to fully appreciate them.

Other comments

We've been to meetings with VisitWales in the past but there weren't many other attractions there with which we could do leaflet swops, and there were lots of statistics about tourism in Wales that didn't really seem relevant or very useful to us.

As a small attraction, run by ourselves, we don't really get the chance to go to many meetings.

We have good links with the local authority tourism officer which we think helps us.

VAQAS - I'm not sure about what that is or if we've been in it, but my husband might know better than me.

WAVA – don't know if we've been in that, but that could have been one of the meetings we went to in the past when there were lots of statistics given to us.

We do go to other attractions to see what they do, but we're a small attraction that is run by ourselves so this is difficult to arrange.

Gardens, Independent Trust, Large South West Wales

Public relations activity, press releases and journalist tours are a big feature for us in getting good media coverage. We make a lot of use of social media, Twitter and Facebook, and find that we get comments and messages from visitors this way which is more interactive. We print and distribute 100,000 promotional leaflets each year which is a significant amount. A combination of all of these is necessary but social media has become increasingly important.

The grey market. Our most significant visitor segment are older visitors, but they're also getting younger each year! Groups visits are still important but most visitors come independently. Yes I have marketing training and my role is specifically related to this.

There is definitely a role for Visit Wales to play in helping attractions but this is not clear at the moment, especially for smaller attractions who may not know who to contact there. I contributed to the Welsh assembly review and the launch of the report was held at Aberglasney a few weeks ago. Visit Wales could do more to help attractions and we shall wait to see what news comes in the New Year on this.

Visitors obviously come for the gardens, but a lot come for a pleasant day out in nice surroundings. We allow the gardeners extra time to talk to visitors and encourage them to do this since we know that the visitors really appreciate this and see it as an important part of their visit

We have recently had European and Lottery funding and have been carrying out visitor research as a requirement of that. Many visitors say that they are pleasantly surprised by the quality of the experience that they get – it is even higher than they expected. They enjoy the gardens and other facilities and enjoy talking to the gardeners. Many visitors are extremely knowledgeable about gardening matters and really enjoy talking in detail to the gardeners about specific topics.

Visitor comments book but we also carry out our own surveys regularly and have had to do this as part of the European and Heritage Lottery funding. We are in the VAQAS scheme. We look at TripAdvisor but don't really take it too seriously, many of the comments can be very subjective and we don't always put a great deal of reliance on them.

Visitor feedback …is included in our planning by taking account of what the visitors are telling us about certain aspects of their visit, including for example catering but we know that talking to the gardens is a strong feature in many comments.

Visitors have said that they are surprised at the overall quality of the attraction and this is repeated by many in their feedback. The aim from the outset at xx was to offer a high quality visitor experience.

Other comments

(some re-confirmation of previous points):

There is a role for VisitWales to play in helping visitor attractions and there will hopefully be more news on how they will do that soon… it's difficult for smaller attractions sometimes to know where to get help and what's available.

Themed museum, Independent Trust, small, Mid Wales

Word of mouth is very important. People hearing about the museum. (Prompt: public relations work) what do you actually mean by public relations work (press releases, articles in local papers) a little bit of that. (Prompt: what about advertising to get visitors) we don't really do advertising because when we did a survey we found that it didn't really work for us. We have a leaflet that people can take with them. It's not for distribution but they can take it home and show their friends.

(main type of visitor) I really can't say any more without looking things up. I don't want to say anything that may be wrong. Send an email and we can look at it in detail and work out our responses.

Email sent with link to survey. A follow up call was made but respondent said that they couldn't add anything to what was in their survey replies.

Castle – privately, owned small attraction. SE Wales

We get a mix of visitors, some coming from afar, just visiting the area, and then most people locally will have been round the castle at some point. We get quite a lot of families and also slightly older visitors. We don't have any marketing expertise and don't really do a lot of advertising. I suppose some workshops or other free advice would be useful.

There's a Facebook page and we do leaflets but I guess the main method is word of mouth really. We do try and do press releases and stories, especially about any events going on at the castle. We try to push these locally. The leaflet is reprinted every few years and is a brief history of what's happened in the castle and helps visitors as they go around.

I think they visit because they find it a picturesque ruin.

We are on TripAdvisor but I haven't actually seen any of the feedback on it.

We don't do that, people can just visit the castle when its open and enjoy it.

We don't have any visitor comments book or anything else really. (Most of the time the castle is unmanned and people put donations in the box instead of an entry charge). We don't really have contact with visitors unless it's for a special event. We also have weddings here.

Themed museum type attraction Independent trust, large attraction SE Wales

Marketing wise, we have a very limited budget. I would say that social media is our main method. Word of mouth as well, but we use Facebook and twitter a lot. We score quite high on TripAdvisor for attractions in Cardiff.

We regularly read the comments on Facebook and if we get negative ones we respond to them, but thankfully the majority are very positive. It's difficult to say who our main type of visitors are especially with the large range of diverse events we have on. Families I would say are the majority, with a lot of people coming to our craft days and toddler days. I do have some marketing experience and also look at what other attractions are doing and try and follow any examples of what works, but it also depends on how much money is available for this. But we do want to do more marketing next year.

We also get a lot of tourist visiting the city who pop in and have a look around (free admission). We collaborate with a lot of community groups and talk about content and events and so on – all kinds of different projects, which helps to bring in visitors.

We definitely think about why people visit and have a very busy diary of events throughout the year, and we constantly in our meetings discuss what's worked and what hasn't, and what we need to do to try and change things.

We use our own images of visitors at the museum to try and explain to people what they'll see when they get here, but most are pleasantly surprised that it's a lot more than they expected.

We have enquiry forms and a box where people can leave comments about their visit.

What we get most of is that people didn't realise that we were here. It's probably due to the lack of money for marketing, but even people in the city say that they didn't know it was here.

Other comments

Over the next year marketing is going to be something that we really have to focus on, with a bit more of a strategic plan for it. To try and increase our number of visitors. We have a plan to spend more money on marketing next year.

Private attraction. Large. NW Wales

Leaflets is our main activity, its what everyone does in this area. We are part of two major attraction consortia, Attractions of Snowdonia which has 32 attractions in it, and Ten Top Attractions which has 14 members. AoS has a full time member of staff who coordinates everything and directs the marketing activities. The vouchers in the leaflets are very successful and help visitors at one attraction go to another in the area.

Families are the main type. They are interested in the heritage of Wales, and the old slate workings, but now that we have the other attractions on site such as the zip wires and bounce below then we're getting more active visitors looking for something different, so that will change the demographic I guess. These are for age 7 plus but we have plans next year for something for under 7s so that will change things as well.

We use the marketing experience of the staff here that's been built up over the years, but also find out from other members of the local consortia what's happening. We tend to know what works and what doesn't, but this has changed with the use of more digital marketing.

We try to adapt to what we think visitors may need and that's what's been behind the recent developments here, so yes, it definitely impacts on our planning. I suppose its looking at what people do when they are here, visiting the shop and café and so on and if there are long queues we'll try and do something about that.

Obviously we'll use images of visitors at the attraction and the new zip wires and other activities are something that feature strongly to show people what's here.

We use TripAdvisor as our main way of getting comments and feedback – it's the place that most people now go to and comment on how their day was, did they enjoy etc, and it's widely recognised by visitors as a source of comments. So we monitor that and respond when necessary.

Visitors usually have a good idea of what to expect but some weren't aware of the changes here – we've gone from two underground tours down to one but also have the zip wires and other things, so not all of them realised that before they came, and they have been surprised that there is more to do here now.

Other comments

We recently attended the VisitWales roadshow and could see their direction over the next few years for helping to promote attractions, with different themes at different times. This year was activity and adventure and I think that helped us. Heritage and culture will be the theme for the next two years.

Museum, Independent, small – medium. West Wales.

Leaflets would be one but more signage in the town would help us. Over and above both of those is our social media and online presence with the website. We use Facebook and twitter regularly.

Our main visitors come in the summer so it would be families and families with young children in particular. 30-somethings with young children. The main reason they come is to get out of the rain (!), but if they're in the town anyway, perhaps coming to see the town, then they may come to us and extend their visit here. We don't have any specific marketing training, but as a museum professional, I do try and keep up to date with what's happening at other similar museums to see what's successful. But it's also the case that each place is unique and so there's perhaps not one solution that fits everywhere. We do target those people who come to the town and try and get them to come here, and show that it's a museum with lots of interesting local heritage but also events and hands on activities for younger visitors.

There are areas and parts of the museum for different ages so there will things for younger visitors to do as well as the more traditional museum type displays. But we do incorporate the views of visitors in our planning for the year ahead. We try to show visitors doing things at the museum and also highlight the activities on social media, especially to local visitors

We have cards for comments and feedback, a visitors book and we also took part in a survey from AIM (Association of Independent Museums). Generally people are surprised at the quality of what they see, and its hidden away a little bit from the town centre …and professionalism of what they see

Any other comments

I think it's really down to us by and large – initiatives to market or promote museums and heritage attractions nationally or on a large scale are all well and good, but I think its down to the individual attraction to get their own visitors in… each one is so very different.

Heritage attraction, Local Auth, Large

We have our own leaflets which are distributed and also the website and social media. I suppose the main ones are leaflets and of course word of mouth as well. We've just gone through a re-structuring process as part of the local council funding review. A lot of our marketing activity is done through, or in conjunction with the council's marketing department. We have a meeting in the New Year to discuss promotional activities for the attraction.

The type of visitors varies a lot in the different seasons. We do have visitors on holiday but also a lot of local people who come to the different events, especially schools. We did have a marketing officer but there have been several staff changes and we now work more closely with the council's marketing department so we tend to rely more on them for help and guidance.

Moving forward we are going to look at this because we want to widen the audience and get more people to come here. There's a mixture of family events and events for others. Lots of ideas for other events, such as blue plaques featuring details of famous local people, talks and so on, especially on a heritage theme.

Yes, we show pictures of visitors at the attraction.

Visitor comments book and people also write in to the council if there's anything specific. We do look at TripAdvisor but don't always reply as we don't have the time. We do try and develop new things for visitors, but it has to be within the budget that's available. We have some buildings on site which have been closed which have the magnificent engines from the winding gear, so it would be nice to open those for visitors.

Any other comments

We are looking at getting museum accreditation status to help with the development of the attraction as we think that is an important direction for us.

Themed attraction (wildlife) Private, large, NW Wales

We do leaflets and the website are the main marketing things we do. Facebook is the one for social media. The attraction has been open for some years now so we know what works and what doesn't in marketing.

Young families are the main types and they tend to be visitors to the area.

We have comment cards and stuff like that.

We don't really base any developments on this.

We think about the visitor flow around the buildings

No visitor comments book, but have been in Vaqas scheme. We don't monitor TripAdvisor, although we may look at it from time to time, its not really that relevant to us.

To be honest, we have so many visitors of all sorts of different types that some may like some things and others would like different things, so its all a bit of a mixture really.

Any other comments

We never fill in surveys.

Heritage/museum, Local Authority, Large NE Wales

I think the main method is still leafleting, but that is now by a hair's breadth being overtaken by social media. Social media is overtaking leafleting, only in terms of response.

Very clearly families with young children. There's about a 50:50 split of locals and visitors to the area.

We did have a marketing officer but now work more with the marketing department of the council to prepare our materials. I have a lot of experience of managing and marketing the attraction that's been developed over the years and I can apply that, but sometimes its still a matter of trial and error, and of course it depends on the budget available.

Visitors come mostly for the events – we run 136 events through the year and all these are included in the admission charge at no additional cost. There's something on every day of the school holidays. Coming to see the animals is also a big reason for families to visit.

Yes, pictures of the different parts of the attraction, and especially the animals and events.

We have a comments book that I check weekly. We have a season pass with over 1000 season pass holders and we do an annual end of season questionnaire. This gives us really useful feedback from our most regular visitors, and we've been doing this for over 9 years so it gives us very strong consistency for comparing how we're doing year on year. If there are particular points then we'll act on those, for example they said they wanted working swings in the children's play area, so these were provided.

I think there are two gaps in expectations, lets deal with the negative one first..we are a museum and market ourselves as that, but the museum side is a bit out-dated now and anyone who comes specifically for that, although it's not many, then they may be disappointed. So there is a gap in expectations. But the very positive aspect is the service that visitors get from staff, this always comes out very highly in surveys and feedback, so they may not have been expecting such good service before they came.

Any other comments

Tourism in Flintshire seems to be greatly overlooked by the tourism bodies in Wales. Visit Wales in the past seems to have concentrated on Pembrokeshire and golf, to the detriment of other parts of the country and other attractions, especially heritage tourism. Not just castles and National Trust, but many other smaller places and things that could be part of the bigger parcel of what's on offer.

Heritage/retail, privately run, medium size, NW Wales

Leaflets are still the most important especially for those visitors in the region. Maybe before they come they'll look at the website, but when they're in the area then the leaflet is important for those 'grazing' and they want a hard copy.

The marketing budget is quite low but we do a lot of local advertising for the shop. I suppose it's the experience that we've built up over the years so we know what works.

We do use Facebook and Twitter

We're for everyone really because we have the shop which is free entry and then children's activity sheets and things like that for the attraction and tour.

We have seasonal variations so mostly visitors in the summer but then Christmas time its more local people coming to the shop for presents.

Activities for children and some themed events. If there's anything in particular that visitors say they want then we'll consider that in our plans.

We try to be clear in describing what's here and what there is for people to see and do.

We have visitor comments book and comments sheets.

We don't tend to over-market things and are honest so I think visitors get a true picture of what's here

Any other comments

We have saturation in this part of North Wales in terms of attractions, there's so many of us and we're all competing for the same business.

Themed Museum, Privately owned, Small, West Wales

We pay for advertising in Coast to Coast, which seems to work well, and we're in the local authority brochure for Ceredigion. We have our own leaflet, which we try and distribute locally. Word of mouth is important for them to visit, they come for nostalgia, or maybe they're interested in collecting a particular item or seeing other similar things.

The website is important, and we're on Facebook and 'tweet' as well. Facebook is useful, it's very instant in terms of response and its low tech as well which helps us. We still firmly believe that there's a place for paper leaflets, you can't use technology for everything.

Most of our visitors are over 50s, and seem to be a mixture of visitors and locals. We don't have any marketing training but we know you need to do leaflets and website and we try and do some advertising. Of course some help and guidance on this would be great especially if it was free.

Because of the visitors interest in antiques we have developed a small range of bric-a-brac and memorabilia that people can buy

We've advertised in the local antiques guide because people who like antiques are highly likely to like museums, and this has proved quite good for us.

We get comments from Facebook but also TripAdvisor – I only discovered recently how to respond to comments on that, and now do more of that. We do incorporate visitor comments: just one small example, one visitor said that we should have 'tea room' on our sign on the road outside, since 'teas' suggested a burger van type of affair, and our café is much more that that. So we have changed it to 'tea room'.

We describe what is here quite clearly – a museum of childhood memorabilia and that's what people get. Most are happy to talk about the toys that they had and had not seen anything similar for years.

Any other comments

The local authority tourism activities don't seem to be as coordinated as they used to be, and there's too much emphasis on new technology and digital and online material. Many of our older visitors still prefer the old fashioned paper copies of information rather than rely on downloads all the time.

Themed environmental attraction, large, Mid Wales

I think the most important things...we use digital media a lot, but for visitors its probably posters and leaflets to the local caravan parks in the summer. We keep the website up to date with news and what's happening. Some people come from quite a long way away because they are really interested in the alternative aspects of the attraction, but then others are perhaps tourists in the area who want to see something different.

The marketing here covers a variety of different things from visitors to the attraction to conferences and accommodation and use of the facilities as well as consultancy fees for specialist environmental advice. We have a small marketing team that get involved in everything.

People tend to come because of the main theme of the attraction, it used to be a 'must see' place in the area – it still is to some extent but there's so much competition now from other places that the number of visitors per year has fallen over the years.

We keep to the main ethos of the Centre and concentrate on sustainable and environmentally friendly things but we know that visitors also want to see something new so we have to think about that in our planning and developments.

I think people have a generally good idea of what the Centre is all about

We have a visitor comments book but also feedback forms that we look at regularly, but also review it at the end of the season to see what the main messages are. We look at TripAdvisor but don't always respond – it can be a very subjective thing about minor points. We also have feedback from visitors through staff when they talk to them.

Visitors are generally clear about what they'll see here – there's a lot of information for them about environmental issues.

Country park and historic building, Large, Local Auth. SW Wales

We have some Welsh Government money to spend on an audience development plan at the moment so we'll have more information on this in the New Year, but we know because of the nature of the attraction, with the 60 acre country park and the historic buildings, we get a mix of visitors. It also depends on the time of year. We don't have a marketing officer but can work with the appropriate department in the council. Sometimes it's a case of trial and error and see what works and this is what we're finding with Facebook. It would be good to have some advice on this and see the bigger picture from other attractions.

Up until the last few years, the main leaflet was our best means of advertising, but whilst the work was going on to develop the walled garden we didn't reprint or distribute it and we found that there wasn't the drop in visitor numbers that we had expected. So perhaps the leaflet wasn't as effective as we thought it was. We do advertise in Coast to Coast, and I think it's a combination of all the methods, but we're coming to the conclusion that digital methods are just as good as the traditional ones, and a lot cheaper.

We had an event recently for which we had a good number of visitors for just a small amount spent on a Facebook campaign. The big cost with leaflets is the distribution.

Compared to other attractions in the area like Oakwood or Folly Farm what you pay to come here is much less. What's interesting for example, is that we get young families on holiday that come here for a relatively inexpensive day out after going to places like Folly Farm and spending a lot of money there earlier in their stay.

We have just completed some major new projects including the walled garden and other improvements, and we find that people come to us whatever the weather – its not juts a wet weather attraction but because of the woodlands and outdoor areas, people come on a sunny day as well.

We describe the different parts of the attraction and also use Facebook more and more for particular events. It's been very useful for this, and for one event recently we only did the Facebook campaign, and it was easy to tell visitors what to expect.

We take the visitor comments book as our best indication of visitors views. The comments tend to be more objective and thought through. We have found that with TripAdvisor there's a polarisation no views, and some people put rave reviews but then others complain about minor things or others use it as a forum to complain about other things, including ex members of staff that weren't happy. So we tend not to take too much notice of it really. Everyone's entitled to their opinion but generally its not really a reliable indicator of visitor opinion overall – the visitor comments book tends to be much better and more reliable for that.

Visitors are generally surprised by how much there is here to see and do – we have lots of different aspects to the attraction from the woodlands to the heritage. There are also lots of new things being developed, so people are generally very happy with what they've seen.

Any other comments

We need more identity for Wales in our general promotion for all aspects of marketing – I've been to Scotland for example, and there's much more of a feeling that you've gone somewhere different. Here, apart from the different language on the roadsigns, there's not a lot else that is noticeably different. There's a lack of national identity that some of our international visitors comment on as well.

Historic building and museum. Small, Mid Wales, Independent Trust

We have flyers that we put around the town in various places and other tourist sites and use those to attract visitors. We don't use Facebook or twitter. The main reason is that it would be just another job to do – we're all volunteers and our main effort is on getting the building open to the public. So it's a question of available time.

We used to get a lot of visitors from over the border in the midlands but have noticed that as the price of fuel has gone up, that we now get much fewer from that area. There are a few local people that come but we've also seen a lot more international visitors coming here which is nice.

We wouldn't be able to take part in any training for marketing because we're all volunteers and we do other things as well. But help and advice may be useful, especially if something new could be set up for us perhaps to do with the website.

We think that people come to see something about the heritage of the area and also there are a lot of artefacts and memorabilia that are interesting to look at.

The aim is to keep the building as original as possible, but also tell the story of the history of Montgomery and the local area.

We try to explain that we have a lot of stories to pass on from local people.

We have a visitors book and every visitor is encouraged to write something, but we also have a comments column for staff to write down anything they've heard that might be useful in future. We have some really really nice comments from visitors.

The building looks quite small from the outside, so everyone is surprised by the range of things inside. They can see the building itself which is very old, but also the collections and especially the stories linked to local people and how they lived.

Any other comments

We'll try and fit in with other themes that come up, so may do something on the First World war next year and how it affected the local population, but again it depends on the support of our volunteers.

Outdoor attraction, Private, Small, SW Wales

Website is the main method, we have a little bit on Facebook but not a lot. We try and attract school groups but don't get many of those. Otherwise I think it's a mix of different people and ages. A lot are on holiday. We don’t have any marketing training. Help would be good but we can’t afford advertising and also it would be difficult to leave the farm and attraction to go anywhere else.

We’re not sure why people come – whether its to see the xx or the farm, but we have been doing some refurbishing and will do a lot more promotion next year. In the past we’ve provided different things for people, with some play tractors and toys for very small children, and we’ve also had simple refreshments. But we still have to run the farm at the same time.

We try to describe what we’ve got here but we haven’t done a new leaflet because of the cost and we’re not always sure that it would get to the right place. We’ve been doing some changes to the farm so our advertising has been minimal over the last year or two.

We don’t have a visitor comments book but our numbers are quite low and we get to speak to all our visitors so we hear about their visit directly.

Yes, even though it’s got xx in the name of the attraction, a lot of people who come didn’t expect to have to walk up the hill, so they’re a little surprised by that. A hill fort is going to be at the top of a hill. They also don’t understand that we’re a working farm, and they expect to pat donkeys or rabbits, or get close to the animals, which isn’t possible on a working farm. They seem to expect something different to what we’re advertising.

Any other comments

We’re probably not the best example to look at because we’ve had the building work going on over the past few years and not concentrated on the visitor attraction side of things. But we do want to push that a lot more in future.

APPENDIX 5	Facebook	Listing type	Rating	Total reviews	Likes	Visits	Comments	Notes/ response from attraction	scores	positive	negative	% age
Parc Cwm Darran	Good pics, not yet 'official'	sport & recreation	4.6	19	192	2725	good for dog walking, jogging	Nr Merthyr Tydfil. Café with hot meals	13/4/2/0/0	17	2	89
The Veddw	good pics, some comments	tours/sightseeing			828			Veddw House, gardens open in summer. Link to website; phone no.				
The Open Boat	V good	Boating	5	129	1132	139		very good use of FB	129/0/0/0/0	129	0	100
The Play Barn, Brynich	V good	recreation centre	4.3	42	687	825		Excellent use of FB with prompt reply to negative comments	25/10/2/3/2	35	7	83
Heatherton World of Activities	Excellent	outdoor, sports centre, visitor attraction	4.6	297	11,465	8,593	problems with party booking	Responded to comments	218/52/15/5/7	285	12	96
Greenfield Valley Heritage Park	Good, unofficial	local business	4.4	45	760	5330	cost of admission	none	29/10/3/0/3	39	3	87
Ffestiniog & Welsh Highland Railways	Good, unofficial	public transportation	4.8	372	1487	5225	contributions from volunteers and visitors	none	313/44/7/5/3	357	15	96
Ditto, Porthmadog Harbour Station	Excellent, official postings	railway	4.6	328	726	8394	official postings, passenger comments		240/65/17/3/3	305	23	93
Ffestiniog & Welsh Highland Railways	Excellent, official postings	Attractions/things to do			10,540	1037 talking about this	Off, link to prices and times, online booking links to you tube, TripAdvisor	About, timeline, events				
Monmouth Regimental Museum	unofficial, no phone or email	history museum	3.5	2	4	49	visitor pics	needs improving				
Newport Transporter Bridge	unofficial, phone, no email but opening times	bridge	4.5	237	850	5759	visitor pics, some of families at home!	basic, needs improving				
Newport Transporter Bridge	official, good	non-profit organisation			42		official postings, some visitor comments					
National Botanic Garden of Wales	Excellent, official postings,	event venue, tourist attraction	4.5	670	8198	13254	instagram and twitter	6655 followers on twitter	467/128/58/9/89	495	156	74
Carew Cheriton Control Tower	Good, official postings	museum	4.7	19	402	108	poor access for buggies and wheelchairs on events		16/2/0/0/1	18	1	95

News from Narrow Gauge Railway Museum, Tywyn	Good, official postings	museum	4.1	11	365	1	no visitor comments or postings		7/1/1/1/1	8	3	73
The Winding House, New Tredegar	incomplete unofficial	local business			1	5	no address or phone number	1 visitor pic 2013				
The Winding House	official postings	history museum	4.6	41	1474	321	official postings; very recent. Replies to some reviews	2 visitor pic 2016. 2 x local business (2 likes each)	29/8/3/1/0	37	4	90
Gwynedd Museum & Art Gallery	Average could be improved	history museum	5	2	18	32	no address	some official postings but visitor info could be improved	2/0/0/0/0	2	0	100
The Judge's Lodging	excellent, official postings	history museum, historical place	5	10	408	201	unique	personalised response to postings/likes. Events info		10	0	100
Swansea Museum	excellent, official postings	museum	4.1	147	2537	1262			70/31/36/9/1	101	46	69
Pembroke Dock Heritage Centre	Contact details no logo or pic	local business	5	1	5	31	some visitor pics	potential for more input from attn				
Cardiff Castle	excellent	tourist attraction, historical place, landmark	4.3	3658	12477	122,073	visitor and official postings	response to -ve comments about xmas event, but not previous about pricing and condition of birds of prey	2000/906/483/104/68	2906	655	79
Llanelly House	excellent	tourist attraction, restaurant, gift shop	4.8	47	3031	958	visitor and official postings	responses to some comments	41/5/0/0/1	46	1	98
King Arthur's Labyrinth	excellent	tourist attraction	4.3	260	1797	2997	mostly official postings	responses to many comments +ve and -ve. Book now	138/71/39/5/7	249	51	96
Kidwelly Industrial Museum	could be improved	museum			132	102	1 official posting of pics July 15 then lots of student pics from event.					
Trefriw Woollen Mills	excellent, official postings	history museum, women's clothes shop, cultural, gift shop	4.5	10	729	271	mostly official postings	responses to queries on shop stock	7/1/2/0/0	8	2	80
Mumbles Pier	excellent, official postings	public places and attractions	4.4	167	4021	34,127	official and visitor postings	responses to some but not others	101/31/31/3/1	132	35	79
Dan yr Ogof National Showcaves	excellent, official postings	tourist attraction	4.4	890	5,964	20,798	official and visitor postings	responses to most. Expensive	562/198/95/22/13	760	130	85
Welsh Mountain Zoo	excellent, official postings	non-profit organisation			12,105		official and visitor postings; donate now button	no responses				

Inigo Jones	could be improved, no photo, address or website	tourist attraction	4.5	11	14	442	only visitor postings	no responses	5/6/0/0/0	11	0	100
Lake Vyrnwy Sculpture Trail	unifies poor	park			1	10	1 visitor pic	unofficial no postings				
Cardigan Bay Marine Wildlife Centre	official postings	non-profit organisation			2876		Almost all official postings					
Glynn Vivian Art Gallery	excellent, official postings	art gallery	4.4	53	2815	118	Almost all official postings	responses to comments and queries	32/13/5/1/2	45	8	85
Rhondda Heritage Park	excellent, official postings	seasonal shop, history museum, cultural gifts, shop	4.3	92	2511	3968	official and visitor postings	responses to some but not others	48/27/11/4/2	75	17	82
Amgueddfa Forwrol Llyn, Nefyn (places)	excellent, official postings	museum art gallery			820		mostly official postings					
(about) National Coracle Centre, Cenarth	poor, basic automatic listing				12			another listing available with no likes				
Barmouth Sailor's Institute												
Magic of Life	excellent, but official postings	tours & sightseeing	4.4	10	92	353		no official contribution, nice pics	7/2/0/0/1	9	1	90
Amgueddfa Lloyd George Museum	excellent, official postings	museum/art gallery			173		mostly official postings	also Lloyd George Museum site 2 likes				
Fourteen Locks Canal Centre	excellent, official postings	tourist attraction	5	15	1342	1107	mostly official postings		15	15	0	100
Swtan Heritage Museum	official postings	tours and sightseeing			513		mostly official postings					
The Coffee shop, Ocean Lab	excellent, official postings	coffee shop, restaurant	4.5	50	725	341	mostly official postings		34/12/2/1/1	46	4	92
Ocean Lab!	3 visitor postings only		5	3	3		ghost' site					
Sea Trust	good, but could be improved	non-profit organisation	4.9	17	1022	11	some reviews from supporters	more about the organisation than the attraction	16/0/1/0/0	16	1	94
Folly Farm	excellent, official postings	zoo & aquarium, tourist attraction, farm	4.7	3772	38150	99924	expensive, care of animals.lots of official postings	regular updates and responses	2.9k/565/170/44/64	3465	278	92
Big Pit National Coal Museum (places)	unofficial site	history museum	4.5	943	1680	18734	all visitor pics and comments	unofficial page	665/171/77/13/17	836	107	89
Big Pit National Coal Museum (NMW) (Pages)	official	Museum/art gallery			3539		official postings					
St Fagan's National History Mus (NMW) pages	official	attractions/things to do			4426							
St Fagan's National History Mus (NMW) places	unofficial site	history museum	4.6	678	5191	33853	visitor pics and postings	unofficial page	520/110/28/8/12	630	48	93

Museum of Welsh Life, St Fagan's	unofficial site	history museum	4.6	691	642	8956	visitor pics and postings	unofficial page	480/142/54/12/3	622	69	90
Bodnant Garden (NT)	official	tourist attraction			6482		official postings plus visitors	official page				
Bodnant Garden (NT)	unofficial site	outdoors	4.6	650	1334	12823	visitor pics and postings	unofficial page	481/128/26/4/11	609	41	94
Erddig (NT)	unofficial site	historical place	4.4	383	974	10499	visitor pics and postings	unofficial page	232/94/44/7/6	326	57	85
Dinefwr Park and castle (NT)	unofficial site	sport & recreation	5	3			some vis pics, basic	unofficial	3/0/0/0/0			0
Parc Dinefwr	unofficial site	outdoors	4.5	88	296	2723	vis comments	unofficial	57/23/6/1/1	80	8	91
Newton House (NT)	unofficial site	interest			100		1 pic very basic	unofficial				
Harlech Castle (Cadw) pages	official	attractions/things to do			1796		official and vis postings	official page				
Harlech Castle (places)	unofficial site	landmark	4.7	142	659	854	vis pics and postings	unofficial	117/18/5/0/2	135	7	95
Harlech Castle (places)	unofficial site	local business	4.6	10	132	3518	vis pics and postings	unofficial	8/1/0/1/0	9	1	90
Caerphilly Castle (Cadw)	unofficial site	landmark	4.5	1500	2643	28953	vis pics and postings	unofficial	1000/333/144/12/19	1333	175	89
Caernarfon Castle (Cadw)	unofficial site	historical place	4.5	2000	3332	54866	vis pics and postings	unofficial	1300/464/198/24/22	1764	244	88
Llancaiach Fawr Manor (LA)	official	public places & attractions; museums	4.5	249	4641	5220	official postings plus visitors	official page	171/50/14/3/11	221	21	89
Ruthin Gaol (LA)	unofficial site	museum	4.5	57	59	1071	vis pics and postings	unofficial but 1 posting for event	39/9/6/2/1	45	9	79
Ruthin Gaol /Carchar Ruthin	official	history museum, tourist attraction			267	29	official postings - last one oct 15	official page				
Pembrokeshire Falconry	official	attraction/things to do	5	3	2871	2	official postings and pics. Activities at other attns (NBGW, Picton Castle)			3	0	100
Principality Stadium	official	sports venue and stadium	4.5	7,130	35,453	391,935	forthcoming events promotions	No responses to any comments, +ve or -ve. 'staff were very helpful'; 2 postings in the previous month - visitors contacted via twitter and email with complaints about service, no response		6,200	895	87
Pembroke Castle	unofficial site	places		506			vis pics and postings	Family ticket expensive	310/123/55/11/7	433	73	86

Andrew Logan Museum of Sculpture	No listing											
Anglesey Sea Zoo	official	zoo aquarium, café, public places, attraction	4.1	561	7385	7555	official pics and postings	recent updates; some responses to -ve comments. Expensive, smaller than expected, busy on wet days	289/126/91/31/24	415	146	74
Bala Lake Railway	official	railway, t attn,	4.6	115	4102	1308	official pics and postings	no responses	81/23/7/2/2	104	11	90
Barry Island Pleasure Park	unofficial	amusement landmark	4.3	124	4085	8423	vis pics and postings	no responses	85/13/13/5/8	98	26	79
Brecon Cathedral shop & HC	official	cultural gifts shop	2	1	204	21	official pics and postings	April 14 no message, no response				
Brecon Mountain Railway x2	unofficial	national park, also arts and entertainment	4.4	181	1881	4948	vis pics and postings	no responses	108/48/13/7/5	156	25	86
Castell Henllys x 2		museum, also arts and entertainment	4.7	58	319	822	vis pics and postings	no responses	47/7/2/1/1	54	4	93
Erwood Station Gallery x2	official	local business	4.4	7	134	580	official pics and postings	no responses	6/0/0/0/1	6	1	86
Fairbourne & Barmouth Railway x2	official	travel and transportation	4.8	9	3940	418	official pics and postings	no responses	7/2/0/0/0	9	0	100
Foel Farm Park	official	farm, outdoor recreation, café	4.7	196	2030	3586	official pics and postings	responses to recent postings	159/23/9/3/2	182	14	93
Gigrin Farm	official	farm, event			2356		official pics and postings	responses to recent postings				
Gower Heritage Centre	official	tourist attraction	4.7	66	2595	4956	official pics and postings	responses to negative postings	53/9/1/0/3	62	4	94
Gwent (usk) Rural Life Museum x3	unofficial	history museum	5	2	8	89	vis pics and postings	no responses				
Gwili Railway	official	railway, t attn, historical place	4.5	219	2591	4939	official pics and postings	response to postings	153/38/17/3/8	191	28	87
Gwydir Castle	unofficial	historical place	4.6	35	380	504	vis pics and postings	no responses	28/2/4/1/0	30	5	86
Harlequin Puppet Theatre	unofficial	performance venue	5	6	50	74	vis pics and postings	no responses	6/0/0/0/0	6		100
Llanberis Lake Railway	unofficial	arts and entertainment, train station	4.4	192	303	3084	vis pics and postings	no responses	123/42/18/5/4	165	27	86
Llangollen Railway x3	official	railway, t attn, train station	4.7	29	6309	350	official pics and postings	no responses	27/0/0/0/2	27	2	93

Oakwood	official	tourist attn, theme park	4.1	5077	70153	41980	official pics and postings	responses to most	2.8/998/676/220/338	3798	1234	75
Seaquarium Rhyl (Oceanarium)	official	zoo and aquarium	4	517	18207	4718	official pics and postings	no responses	250/112/83/34/38	362	155	70
Oriel Plas Glyn Y Weddw	official	museum, art gallery, food	4.9	7	2791	1517	official pics and postings	no responses	6//1/0/0/0	7	0	100
Picton Castle	unofficial	landmark	4.3	70	488	2539	vis pics and postings	no responses	43/15/7/3/2	58	12	83
Portmeirion x2	official	tourist attn, hotel	4.8	57	11906	56326	official pics and postings	some responses	49/4/3/0/1	53	4	93
Royal Cambrian Academy of Art	official	art gallery	4.6	34	1527	171	official pics and postings	no responses	25/6/2/0/1	31	3	91
Snowdon Mountain Railway	official	landmark, tourist attn	4.5	1017	21186	9707	official pics and postings	no responses	703/178/73/18/45	781	136	77
Talyllyn Railway	official	tourist attraction	4.7	557	26794	5658	official pics and postings	no responses	451/79/22/1/4	530	27	95
Techniquest	official	arts, entertainment, place and attn	4.7	68	6738	27217	official pics and postings	no responses	59/3/4/1/1	62	6	91
Tenby Museum & Art Gallery	unofficial	museum	4.7	6	82	154	vis pics and postings	no responses	5/0/1/0/0	5	1	83
The Greenwood Forest Park	official	tourist attraction			11354		official and vis postings	response to quarries				
Thousand Islands Expeditions	official	tours and sightseeing, t attn	5	8	904	16	official pics and postings	no responses	8/0/0/0/0	8	0	100
Vale of Rheidol Railway	official	train station, landmark, t attn	4.6	402	10311	4949	official pics and postings	responses	291/79/27/2/3	370	32	92
Welshpool & Llanfair Light Railway	unofficial	train station, landmark	4.7	89	283	560	vis pics and postings	no responses	68/15/5/1/0	83	6	93
Teifi Valley Railway	no results											

APPENDIX 6 TripAdvisor	Excellent	Very good	Average	Poor	Terrible	Total reviews	Positive	Negative	% satisfaction	Visitor comments	Attn response & what prompted it
Parc Cwm Darren	not on TA										none
The Veddw	not on TA										none
The Open Boat	116	9	0	0	0	125	125	0	100		none
The Play Barn Brynich	5	4	0	0	0	9	9	0	100	Great for younger kids	Sporadic responses
Heatherton World of Activities	316	131	27	8	4	486	447	39	92.0	mostly relating to activities out of main season	replied to most but not all
Greenfield Valley Heritage Park	54	41	11	3	3	112	95	17	84.8	Maintenance of grounds, price	replied to most but not all
Ffestiniog & Welsh Highland Railways	1011	298	49	15	1	1374	1309	65	95.3	50% mostly pricing	prompt responses
Monmouth Castle Museum	14	14	8	4	0	40	28	12	70.0	opening times of museum, not much of castle left	no responses
Newport Transporter Bridge	157	52	10	4	1	224	209	15	93.3	2 Q&A, opening times	some responses but not to the -ve
National Botanic Garden of Wales	287	155	46	14	12	514	442	72	86.0	1 Q&A are dogs allowed	Response to all reviews since Sept 2015, none before then, +ve or -ve. Cost of admission and food -ve.
Carew Cheriton Control Tower	8	8	2	0	0	18	16	2	88.9	limited opening	no responses
Narrow Gauge Railway Museum, Tywyn	not on TA						0	0			
The Winding House	32	5	0	0	0	37	37	0	100.0	3 Q&A opening times	Personalised response to all comments
Gwynedd Museum & Art Gallery	11	4	1	0	0	16	15	1	93.8	hidden gem, new building opening late 2015	no responses
The Judge's Lodging	90	16	2	0	0	108	106	2	98.1	step back in time	no responses
Swansea Museum	43	35	16	2	2	98	78	20	79.6	small and old fashioned	no responses
Pembroke Dock Heritage Centre	26	16	1	1	0	44	42	2	95.5	little gem	some responses.
Cardiff Castle	1541	967	269	66	28	2873	2508	363	87.3	amazing/overpriced/poor xmas event. 2 Q&A not answered	link to tours & tickets; replied to some -ve but not all
Llanelly House	113	51	5	3	5	177	164	13	92.7	unexpectedly good/expensive food. 3 Q&A all answered	some responses to -ve but not all
King Arthur's Labyrinth	104	133	52	15	14	318	237	81	74.5	Q&A opening times etc all answered,	response to ALL reviews!
Kidwelly Industrial Museum	15	17	3	2	3	40	32	8	80	interesting/expected more	no responses
Trefriw Woollen Mills	43	18	12	1	1	75	61	14	81.3	interesting/expensive	responded to ALL reviews
Mumbles Pier	28	23	17	1	2	71	51	20	71.8	pier needs renovating; café good and bad	no responses

Dan yr Ogof National Showcaves	325	218	85	24	12	664	543	121	81.8	3 Q&A opening times, answered	Personalised response to most comments, +ve and -ve
Welsh Mountain Zoo	401	330	117	45	52	945	731	214	77.4	4 Q&A opening & prices, answered	no responses to reviews. Price, cramped conditions for animals
Inigo Jones	38	32	11	4	1	86	70	16	81.4	expensive food, self guided tour	responded to some comments 14/15 but not recently (summer 15 onwards)
Lake Vyrnwy Sculpture Trail	not on TA						0	0			
Cardigan Bay Marine Wildlife Centre	not on TA						0	0			
Glynn Vivian Art Gallery						1	0	0	0.0	Incomplete, no contact details. Been closed for 2 years, but still events	none
Rhondda Heritage Park	47	24	15	3	1	90	71	19	78.9	2 Q&A access, not answered. Disappointing; great guide. Good xmas event 2015	none
Amgueddfa Forwrol Llyn, Nefyn	8	4	1	0	0	13	12	1	92.3	nice little museum.	1 response to bad coffee.
National Coracle Centre, Cenarth	11	15	3	1	1	31	26	5	83.9	expensive, little there/fascinating place	no responses
Barmouth Sailor's Institute	not on TA						0	0			
Magic of Life Butterfly House	48	25	18	13	11	115	73	42	63.5	expensive, very small/beautiful butterflies	no responses
Lloyd George Museum	43	20	2	1	0	66	63	3	95.5	hidden gem	no responses
Fourteen Locks Canal Centre	23	31	8	3	1	66	54	12	81.8	intriguing/not working locks, small	no responses
Cyfeillion Swtan (Heritage Museum)	10	0	0	0	0	10	10	0	100	fascinating	no responses
Ocean Lab, Sea Trust Wales	6	7	4	2	2	21	13	8	61.9	good café, attrn could be better	no responses
Pembrokeshire Falconry	220	1	0	0	0	221	221	0	100	great experience	none
Folly Farm	1952	322	57	15	14	2360	2274	86	96.4	various issues	responded to all comments
Big Pit National Coal Museum (NMW)	1068	114	12	4	6	1204	1182	22	98.2	underground full	no responses
St Fagan's National History Mus (NMW)	2745	724	137	45	19	3670	3469	201	94.5	car park expensive; no prams allowed	only 1 response: to -ve comment
Bodnant Garden (NT)	747	157	14	8	5	931	904	27	97.1	parking, access	Sporadic responses
Erddig (NT)	353	159	41	8	6	567	512	55	90.3	restricted opening at times	no responses. 2 Q, no answers
Dinefwr Park (NT)	232	81	11	2	3	329	313	16	95.1	parking probs at events; expensive	no responses
Newton House (NT)	24	13	1	2	0	40	37	3	92.5	expensive	no responses
Harlech Castle (Cadw)	309	254	60	3	5	631	563	68	89.2	expensive	responses to most negative comments. Answers to Q&A

Caerphilly Castle (Cadw)	538	259	51	2	5	855	797	58	93.2	needs more info	some responses to negatives & Q&A
Caernarfon Castle (Cadw)	1056	474	87	10	3	1630	1530	100	93.9	mobility; rude staff	response to Q&A and some to negatives
Llancaiach Fawr Manor (LA)	177	58	15	4	5	262	235	24	89.7	food disappointing.	only 1 response to negative
Ruthin Gaol (LA)	51	34	3	3	0	91	85	6	93.4	restricted opening at times	no responses
Pembroke Castle	566	203	19	11	4	817	769	34	94.1	restricted disabled access, expensive	only 1 response to negative
Andrew Logan Museum of Sculpture	not on TA						0	0			
Anglesey Sea Zoo	128	141	107	75	45	497	269	227	54.1	small, expensive	response to all 1 Q&A
Bala Lake Railway	149	126	61	14	10	365	275	85	75.3	expensive	no responses
Barry Island Pleasure Park	81	80	64	27	30	283	161	121	56.9	expensive	6 Q&A no replies - when will log flume be back?
Brecon Cathedral shop & HC	109	66	7	1	0	190	175	8	92.1	nice cakes	no replies
Brecon Mountain Railway x2	110	117	64	32	32	364	227	128	62.4	Santa specials very -ve	no responses 1 QA about play area no reply
Castell Henllys x 2	72	33	16	10	0	132	105	26	79.5	not as much as expected	some replies to recent postings
Erwood Station Gallery x2	44	10	6	3	2	65	54	11	83.1	some expensive items, preferred the old shop, not gallery	some responses
Fairbourne & Barmouth Railway x2	51	29	11	1	1	93	80	13	86.0	expensive	some responses
Foel Farm Park	157	50	8	1	0	216	207	9	95.8	expensive	reply to Q&A only
Gigrin Farm	285	61	4	4	1	358	346	9	96.6	expensive	reply to some Q&A (5)
Gower Heritage Centre	97	83	43	22	26	272	180	91	66.2	expensive	reply to some Q&A (3), no reply to -ve
Gwent (usk) Rural Life Museum x3	43	16	3	0	0	63	59	3	93.7	more than expected	no responses
Gwili Railway	166	79	16	10	13	284	245	39	86.3	shorter journey than expected	replies to most postings and all QA (5)
Gwydir Castle	41	24	2	1	1	70	65	4	92.9	all -ve from more than 2 years ago	no responses, even to 2 QA
Harlequin Puppet Theatre	11	0	0	0	0	11	11	0	100.0	all positive	responses from owner
Llanberis Lake Railway	149	126	61	14	10	365	275	85	75.3	expensive	no responses
Llangollen Railway x3	356	130	34	9	5	538	486	48	90.3	inefficient, rude staff	responses to most -ve
Oakwood	225	286	310	253	308	1382	511	871	37.0	not all rides open, food expensive	5 Q&A, reply to 1
Seaquarium Rhyl (Oceanarium)	80	102	95	44	32	353	182	171	51.6	small and expensive	no responses
Oriel Plas Glyn Y Weddw	55	31	14	3	1	105	86	18	81.9	poor service in café	no responses
Picton Castle	153	82	17	3	2	259	235	22	90.7	castle tours too brief, confusion on charges	response to some

Portmeirion x2	1044	490	211	105	71	1954	1534	387	78.5	no dogs allowed, expensive, fake village	12 Q&A replied, responses to -ve postings
Royal Cambrian Academy of Art	10	8	1	0	0	19	18	1	94.7	all positive, temp exh good	no responses
Snowdon Mountain Railway	527	403	218	108	119	1411	930	445	65.9	expensive, poor customer service in cafes	16 Q&A reply to 1, not to postings
Talyllyn Railway	270	50	7	3	0	336	320	10	95.2	3 QA replies from others	nothing too -ve, but replies from Gen Mngr
Techniquest	357	199	50	19	16	658	556	85	84.5	5 QA replies	expensive, too busy peak times. Some responses
Tenby Museum & Art Gallery	99	61	21	1	0	184	160	22	87.0	positive	responses from mngr
The Greenwood Forest Park	436	120	25	10	10	601	556	45	92.5	expensive	5 QA replies from other vis. Mngr replied to -ve
Thousand Islands Expeditions	128	16	4	1	1	151	144	6	95.4	probs with weather	3 QA replied, some -ve from 2/3 years ago, response from attn
Vale of Rheidol Railway	320	132	10	1	0	470	452	11	96.2	price	3 QA replied, 2 -ve replied
Welshpool & Llanfair Light Railway	157	34	6	0	2	200	191	8	95.5	some price	1 QA replied, no response to -ve but not recent
Teifi Valley Railway	36	24	8	2	5	75	60	15	80.0	old -ve,new mngt 2015	4 QA replied

APPENDIX 7 Google	Excellent	Good	Average	Poor	Terrible	Total	Rating	%age 1-3 – 4-5 +	Visitor comments	Attraction response
Parc Cwm Darran	5	0	0	0	0	5			great views; beautiful walk	No Response
The Veddw	0	0	1	0	0	1			no comments	
The Open Boat						0			no comments	
The Play Barn, Brynich						0			no comments	
Heatherton World of Activities	11	1	2	0	0	14	4.6 from 14	86	great time; pricing queries	response to pricing queries
Greenfield Heritage Park	7	10	1	0	0	18	4.3 from 18	94	great day out ; untidy in places	No response
Ffestiniog & Welsh Highland Railways	19	7	0	1	1	28	4.5 from 28	93	great views ; too expensive	No response
Ditto, Porthmadog Harbour Station						0				
Ditto						0				
Monmouth Regimental Museum	1	1	1	0	0	3			nice	No response
Newport Transporter Bridge	14	5	0	1	1	22	4.5 from22	86	amazing; why do you have to pay	No response
National Botanic Garden of Wales	13	6	1	1	0	21	4.5 from 21	91	great walks; nothing special for the money	No response
Carew Cheriton Control Tower						0				
News from Narrow Gauge Railway Museum, Tywyn	5	4	0	0	0	9	4.7 from 6	100	no comments	
The Winding House	0	2	0	0	0	2	4.0 from 2		no comments	
Gwynedd Museum & Art Gallery	1	0	0	0	0	1			no comments	
The Judge's Lodging						0				
Swansea Museum	8	5	1	0	1	14	4.3 from 15	80	small but beautiful	No response
Pembroke Dock Heritage Centre	1	0	0	0	0	1			helpful staff	
Cardiff Castle	86	35	10	2	1	134	4.5 from 134	90	wonderful; expensive	No response
Llanelly House						0				
King Arthur's Labyrinth	3	9	1	0	0	13	4.2 from 13	92	good; not quite what we expected; pricey	No response
Kidwelly Industrial Museum	0	2	0	0	0	2			interesting	No response
Trefriw Woollen Mills	1	0	0	0	0	1			interesting	No response
Mumbles Pier						0				

Dan yr Ogof National Showcaves	25	14	6	4	1	50	4.0 from 50	78	good; expensive	No response
Welsh Mountain Zoo	34	14	6	0	4	58	4.3 from 58	83	great day out; enclosures too small	No response
Inigo Jones						0				
Lake Vyrnwy Sculpture Trail						0				
Cardigan Bay Marine Wildlife Centre	2	0	0	0	1	3				
Glynn Vivian Art Gallery	1	1	0	0	1	3				
Rhondda Heritage Park	1	0	0	1	0	2				
Amgueddfa Nefyn	1	0	0	0	0	1				
National Coracle Centre, Cenarth						0				
Barmouth Sailor's Institute						0				
Magic of Life	4	1	0	0	0	5	4.7 from 5		small but worth seeing	No response
Lloyd George Museum	0	1	0	0	0	1				
Fourteen Locks Canal Centre	1	4	0	1	0	6	4.1 from 6	83	good	No response
Swtan Heritage Museum	1	0	0	0	0	1				
Ocean Lab, Sea Trust Wales	2	1	0	0	0	3			friendly service	No response
Folly Farm (independent)	51	18	8	2	0	79	4.5 from 79	87	expensive. Responses 4 years ago from owner, none recent	No response
Big Pit National Coal Museum (NMW)	62	5	4	0	2	73	4.7 from 73	92	good experience	No response
St Fagan's National History Mus (NMW)	75	20	3	2	1	101	4.6 from 101	94	nice place to go	No response
Bodnant Garden (NT)	20	12	0	4	0	38	4.5 from 38	84	beautiful gardens	No response
Erddig (NT)	10	7	0	0	1	18	4.4 from 18	94		some events info
Dinefwr Park (NT)									3 reviews overall very poor listing	No response
Newton House (NT)									poor listing	
Harlech Castle (Cadw)	20	10	2	2	0	34	4.7 from 34	88		
Caerphilly Castle (Cadw)	56	6	3	1	0	66	4.8 from 66	85		
Caernarfon Castle (Cadw)	40	16	2	0	0	58	4.8 from 58	97		
Llancaiach Fawr Manor (LA)	19	2	1	1	0	23	4.7 from 23	91		
Ruthin Gaol (LA)									1 review, great day out	No response

Pembroke Castle	12	5	1	1	0	19	4.4 from 19	89		
Andrew Logan Museum of Sculpture	5	0	0	0	0	5	1		stunning	No response
Anglesey Sea Zoo	8	8	11	5	1	33	3.6 from33	48	many from 3-4 years ago	some responses from owner
Bala Lake Railway	4	0	0	0	0	4				
Barry Island Pleasure Park	20	10	5	4	3	42	4.0 from 42	71		
Brecon Cathedral	4	2	0	1	0	7	4.4 from 7	86	1 minor -ve at event 2 yrs ago	No response
Brecon Mountain Railway	10	0	2	4	4	20	3.9 from 20	50	expensive.	No response
Castell Henllys	5	4	0	0	0	9	4.5 from 9	100	excellent day out	No response
Erwood Station Gallery	6	0	1	0	0	7	4.6 from 7	86	not much for young children	No response
Fairbourne & Barmouth Railway	2	3	0	0	0	5	4.3 from 5	100		
Foel Farm Park	4	2	1	2	0	9	4.2 from 9	67	all recent, expensive, rude staff, great day out	No response
Gigrin Farm	13	1	1	2	1	18	4.4 from 18	78	spectacular; overpriced	No response
Gower Heritage Centre	8	4	0	1	0	13	4.4 from 13	92	great; expensive	No response
Gwent Rural Life Museum	1	1	1	0	0	3	3	67		
Gwili Railway	4	2	0	0	0	6	4.7 from 6	100		
Gwydir Castle	3	1	1	0	0	5	4.5 from 5	80		
Harlequin Puppet Theatre	5	0	0	0	0	1	1	100		
Llanberis Lake Railway	3	5	0	0	1	9	4.2 from 9	89	enjoyable	No response
Llangollen Railway	10	3	0	1	0	14	4.5 from14	93		
Oakwood	36	15	8	7	14	80	3.7 from 80	64	many recent complaints of rides not open	No response
Seaquarium (Oceanarium)	3	6	5	5	2	21	3.1 from21	43	expensive	No response
Oriel Plas Glyn Y Weddw	7	3	0	2	2	14	4.0 from 14	71	poor food quality (most 2-3 years ago)	No response
Picton Castle							none			
Portmeirion							none			
Royal Cambrian Academy of Art							none			
Snowdon Mountain Railway	17	8	7	8	2	42	3.6 from 42	60	spectacular; overpriced	No response
Talyllyn Railway	10	2	0	0	0	12	4.8 from 12	100	great day out	No response
Techniquest	37	8	4	1	0	50	4.5 from 50	90	great but overpriced	No response

Tenby Museum & Art Gallery	2	1	0	0	0	3	3		1x4mnths ago, 2x4 years ago	No response
The Greenwood Centre	16	9	0	1	0	26	4.6 from 26	96	great for young kids	No response
Thousand Islands Expeditions	2	0	0	0	0	2	2	100	1 year ago, same family	Thank you
Vale of Rheidol Railway	6	5	0	0	0	11	4.6 from 11	100	great	No response
Welshpool & Llanfair Light Railway	4	1	1	1	0	7	4.3 from 7	71	4 years ago -ve expensive	No response
Teifi Valley Railway	1	1	0	0	0	2	2		2 and 4 yrs ago	No response

Appendix 8: Review of websites from Blum and Fallon (2001) list

	Product	Price	Promotion	Place	Cust. Rel	Tech	%		Comments
Andrew Logan Museum of Sculpture	5	1	0	1	2	4	65	www.andrewloganmuseum.org	visit info, online shop, events booking, newsletter sign up; SM links; quotes from others
Anglesey Sea Zoo	5	1	1	0	2	5	70	www.angleseyseazoo.co.uk	video, quiz and games, downloads, café menu for birthdays, SM links, no vis comments, no online tickets
Bala Lake Railway	5	1	0	0	2	4	60	http://www.bala-lake-railway.co.uk	download timetable; TA link and comments; FB link; news; events; no online booking
Barry Island Pleasure Park	5	1	0	0	1	2	45	www.barryislandpleasurepark.co.uk	visit info plus pics. FB link
Brecon Cathedral	5	1	0	1	1	3	55	http://www.breconcathedral.org.uk/	visit info; FB link; 1 YT video: news; just giving donations
Brecon Mountain Railway	5	1	0	1	2	5	70	http://www.breconmountainrailway.co.uk/	FB links; YT channel; tweets; online tickets; no vis comments
Castell Henllys	5	1	0	0	2	2	50	http://www.pembrokeshirecoast.org.uk/castellhenllys	Part of PCNP corporate site: corp FB and YT; downloadable app
Erwood Station Gallery	5	0	0	0	1	2	40	http://www.erwoodstation.com/	attractive pics but basic info. No pricing/free
Fairbourne & Barmouth Railway	5	1	0	1	1	3	55	http://www.fairbournerailway.com/	online donations and shop;FB and TA links
Foel Farm Park	5	1	0	0	2	4	60	http://www.foelfarm.co.uk/	basic but some interactivity; video; FB link for vis comments; puzzle sheet
Gigrin Farm	5	1	0	0	1	3	50	http://www.gigrin.co.uk/	no video; some comments; FB link
Gower Heritage Centre	5	1	0	0	2	3	55	http://www.gowerheritagecentre.co.uk/	FB link; downloadable info; no video; online booking accommodation only
Gwent Rural Life Museum	5	1	0	0	1	1	40	http://uskmuseum.org	no SM; no video; no downloads, nice but basic
Gwili Railway	5	1	1	0	3	4	70	http://www.gwili-railway.co.uk/	downloadable info and menus; vis comments; YT channel but no video on website; discount for locals
Gwydir Castle	5	1	0	1	2	3	60	http://www.gwydircastle.co.uk	pretty but not interactive; link to Amazon for book purchase; twitter but no other SM
Harlequin Puppet Theatre	5	1	0	0	0	2	40	www.puppets.uk.com	not interactive, TA link
Llanberis Lake Railway	5	1	0	1	2	5	70	www.lake-railway.co.uk	online booking; YT video; café menu; newsletter download; SM links

Llangollen Railway	5	1	0	1	2	2	55	www.llangollen-railway.co.uk	online tickets for events; online donations; news; no SM; no video
Oakwood	5	1	1	1	2	4	70	www.oakwoodthemepark.co.uk	book online and save; YT channel; SM links; faq: newsletter subscribe; download map;SM links
Oceanarium	5	1	1	1	3	4	75	www.seaquarium.co.uk	downloadable worksheets; YT link - being upgraded; sign up for newsletter and offers; online tickets with discount;
Oriel Plas Glyn Y Weddw	5	0	0	1	1	5	60	www.oriel.org.uk	virtual tour; webcam; SM links YT channel; online tickets for events; menu download; newsletter download; free not mentioned
Picton Castle	5	1	0	0	2	4	60	www.pictoncastle.co.uk	video; e-newsletter; download café menus; FB links; TA comments used; some interaction but otherwise traditional
Portmeirion	5	1	1	1	1	5	70	www.portmeirion-village.com	online ticket with savings; menu pdfs; online shop; FB link; videos; webcam
Royal Cambrian Academy of Art	5	0	0	0	1	2	40	www.rcaconwy.org	pdf of old guides; no mention of free; no SM; no video; very attractive but not interactive
Snowdon Mountain Railway	5	1	1	1	1	4	65	www.snowdonrailway.co.uk	FB and TA links; online ticket sales; no video; YT channel; no mention of cafes
Talyllyn Railway	5	1	1	2	3	4	80	www.talyllyn.co.uk	TA link and comments; download timetable; discount on fares;link to shop website online sales;café pdf
Techniquest	5	1	0	0	3	4	65	www.techniquest.org	virtual tour; videos; SM links; reviews; no mention of café
Tenby Museum & Art Gallery	5	1	0	2	3	3	70	www.tenbymuseum.org.uk	FB and twitter link - feed; online sales and donation;
The Greenwood Centre	5	1	1	1	3	4	75	www.greenwoodforestpark.co.uk	good SM links; video; online tickets with discount
Thousand Islands Expeditions	5	1	0	0	2	4	60	www.thousandislands.co.uk	TA and tweets; no video or YT link; no online booking
Vale of Rheidol Railway	5	1	0	2	3	5	80	www.rheidolrailway.co.uk	video; newsletter; link to ebay shop;faq;news via FB; online tickets
Welshpool & Llanfair Light Railway	5	1	1	1	2	5	75	www.wllr.org.uk	online tickets with discount; FB and Twitter link; faqs; no video or YT link; online donation
Teifi Valley Railway	5	1	0	1	2	3	60	www.teifivalleyrailway.wales	FB and TA links; online donations; 1 video
Folly Farm	5	1	2	1	4	5	90	http://www.folly-farm.co.uk/	online ticketing with discount; SM links, YT Channel; no video or audio; quiz and games
King Arthur's Labyrinth	5	1	0	1	2	4	65	www.kingarthurslabyrinth.co.uk	video, online tickets links to soc media, v good FB. No vis comments, no menu

National Botanic Garden of Wales	5	1	1	0	4	4	75	www.botanicgarden.wales	many tabs, FAQs, no menus, news, blogs
Dan yr Ogof National Showcaves	5	1	1	0	3	5	75	www.showcaves.co.uk	downloadable app, video, audio.no online booking
Welsh Mountain Zoo	5	1	1	1	3	4	75	www.welshmountainzoo.org	online donations; games;FAQs no video, link to YT; interactive zoo map
Ffestiniog & Welsh Highland Railways and Porthmadog Harbour Station	5	1	2	2	4	5	95	www.festrail.co.uk	downloadable menus; videos, vis comments, soc media links, online tickets, Ytube, live webcams, magazine d'loads, instagram pics, tweets
National Coracle Centre, Cenarth	5	1	0	0	1	1	40	http://www.coraclemuseum.co.uk/	basic info no SM
Actual	**200**	**37**	**16**	**26**	**82**	**145**			
Total	**200**	**40**	**120**	**80**	**160**	**200**			
%age	**100%**	**93%**	**13%**	**33%**	**51%**	**73%**			
	40	**37**	**14**	**21**	**39**	**40**			
%age responding	**100%**	**93%**	**35%**	**53%**	**98%**	**100%**			

Appendix 9 Summary of Social Media analysis (Phase 3)

Name	TripAdvisor % satisfaction	Facebook % satisfaction	Google % satisfaction	Website %
Parc Cwm Darren	x	90	*	60
The Veddw	x	x	*	75
The Open Boat	100	100	x	65
The Play Barn Brynich	100	83	x	55
Heatherton World of Activities	92	96	86	65
Greenfield Valley Heritage Park	85	87	94	45
Ffestiniog & Welsh Highland Railways	95	96	93	95
Monmouth Castle Museum	70	x	*	35
Newport Transporter Bridge	93	x	86	45
National Botanic Garden of Wales	86	74	91	75
Carew Cheriton Control Tower	89	95	x	60
Narrow Gauge Railway Museum, Tywyn	x	73	100	45
The Winding House	100	x	*	50
Gwynedd Museum & Art Gallery	94	100	*	35
The Judge's Lodging	98	100	x	60
Swansea Museum	80	69	80	50
Pembroke Dock Heritage Centre	96	x	*	60
Cardiff Castle	88	79	90	90
Llanelly House	93	98	x	65
King Arthur's Labyrinth	75	96	92	65
Kidwelly Industrial Museum	80	x	*	55
Trefriw Woollen Mills	81	80	*	55
Mumbles Pier	72	79	x	45
Dan yr Ogof National Showcaves	82	85	78	75
Welsh Mountain Zoo	77	x	83	75
Inigo Jones	81	100	x	65
Lake Vyrnwy Sculpture Trail	x	x	x	65
Cardigan Bay Marine Wildlife Centre	x	x	*	65
Glynn Vivian Art Gallery	0	85	*	60
Rhondda Heritage Park	79	82	*	45
Amgueddfa Forwrol Llyn, Nefyn	92	x	*	55
National Coracle Centre, Cenarth	84	x	x	40
Barmouth Sailor's Institute	x	no page	x	35
Magic of Life Butterfly House	64	90	*	65
Lloyd George Museum	96	x	*	40
Fourteen Locks Canal Centre	82	0	83	60
Swtan (Heritage Museum)	100	x	*	45

Ocean Lab, Sea Trust Wales	62	94	*	35
Folly Farm	96	92	87	90
Big Pit National Coal Museum	98	89	92	65
St Fagan's National History Mus	95	93+90	94	65
Bodnant Garden	97	94	84	35
Erddig (NT)	100	85	94	65
Dinefwr Park & N House(NT)	95	91	*	65
Harlech Castle (Cadw)	89	95+90	88	75
Caerphilly Castle (Cadw)	93	89	85	75
Caernarfon Castle (Cadw)	94	88	97	75
Llancaiach Fawr Manor (LA)	90	89	91	65
Ruthin Gaol (LA)	93	79	*	35
Pembrokeshire Falconry	100	100	x	80
Pembroke Castle	94	86	89	75
Andrew Logan Museum of Sculpture	x	x	*	65
Anglesey Sea Zoo	54	74	48	70
Bala Lake Railway	75	90	*	60
Barry Island Pleasure Park	57	79	71	45
Brecon Cathedral	92	x	86	55
Brecon Mountain Railway	62	86	50	70
Castell Henllys	80	93	100	50
Erwood Station Gallery	83	86	86	40
Fairbourne & Barmouth Railway	93	100	100	55
Foel Farm Park	96	93	67	60
Gigrin Farm	97	x	78	50
Gower Heritage Centre	66	94	92	55
Gwent Rural Life Museum	94	x	*	40
Gwili Railway	86	87	100	70
Gwydir Castle	93	86	80	60
Harlequin Puppet Theatre	100	100	*	40
Llanberis Lake Railway	75	86	89	55
Llangollen Railway	90	93	93	55
Oakwood	37	75	64	70
Oceanarium	52	70	43	75
Oriel Plas Glyn Y Weddw	82	100	71	60
Picton Castle	91	83	x	60
Portmeirion	79	93	x	70
Royal Cambrian Academy of Art	95	91	x	40
Snowdon Mountain Railway	66	77	60	65
Talyllyn Railway	95	95	100	80

Techniquest	85	91	90	65
Tenby Museum & Art Gallery	87	83	*	70
The Greenwood Centre	92	x	96	75
Thousand Islands Expeditions	95	100	100	60
Vale of Rheidol Railway	96	92	100	80
Welshpool & Llanfair Light Railway	96	93	71	75
Teifi Valley Railway	80	no page	*	60

* 5 or fewer reviews

Appendix 10 Summary of attraction operators' responses to UGC

Attraction name	Facebook	TripAdvisor	Google
Parc Cwm Darran	No responses	No listing	No response
The Veddw	Regular postings and responses	No listing	No response
The Open Boat	Regular postings and responses	No comments	No response
The Play Barn, Brynich	Excellent use of FB with prompt reply to negative comments	Sporadic responses	No response
Heatherton World of Activities	Regular postings and responses	Replied to most but not all	Response to pricing queries
Greenfield Valley Heritage Park	Unofficial, no responses	Replied to most but not all	No response
Ffestiniog & Welsh Highland Railways	Unofficial, no responses	No listing	No listing
Ditto, Porthmadog Harbour Station	Regular postings and responses	No listing	No listing
Ffestiniog & Welsh Highland Railways	Regular postings and responses	Prompt responses	No response
Monmouth Regimental Museum	Unofficial, no responses	No responses	No response
Newport Transporter Bridge	Unofficial, no responses	No listing	No listing
Newport Transporter Bridge	Regular postings	Some responses but not to the negative postings	No response
National Botanic Garden of Wales	Regular postings, some responses	Response to all reviews since Sept 2015, none before then	No response
Carew Cheriton Control Tower	Regular postings, some responses	No responses	No response
News from Narrow Gauge Railway Museum, Tywyn	Regular postings	No listing	No response
The Winding House, New Tredegar	No responses	No listing	No response
The Winding House	Some postings	Personalised response to all comments	No response
Gwynedd Museum & Art Gallery	some official postings but visitor info could be improved	No responses	No response
The Judge's Lodging	Personalised response to postings/likes. Events info	No responses	No response
Swansea Museum	Regular postings	No responses.	No response
Pembroke Dock Heritage Centre	Basic details; no responses	Some responses	No response
Cardiff Castle	Response to some negative comments, but not all	Some responses to negative comments, but not all	No response
Llanelly House	Responses to some comments	Some responses to negative comments, but not all	No response

King Arthur's Labyrinth	Responses to most comments	Response to all reviews	No response
Kidwelly Industrial Museum	Some postings, no responses	No responses	No response
Trefriw Woollen Mills	Regular postings, responses to queries on shop stock	Responded to all reviews	No response
Mumbles Pier	Responses to some but not others	No responses	No response
Dan yr Ogof National Showcaves	Responses to most comments	Personalised response to most comments	No response
Welsh Mountain Zoo	Regular postings, no responses	No responses to reviews	No response
Inigo Jones	Only visitor postings, no responses	Responded to some comments 2014/15 but not since then	No response
Lake Vyrnwy Sculpture Trail	Unofficial no postings	No listing	No response
Cardigan Bay Marine Wildlife Centre	Regular postings, some responses	No listing	No response
Glynn Vivian Art Gallery	Responses to comments and queries	No responses	No response
Rhondda Heritage Park	Responses to some but not others	No responses	No response
Amgueddfa Forwrol Llyn, Nefyn (places)	Regular postings, some responses	1 response to complaint about coffee	No response
(about) National Coracle Centre, Cenarth	Basic, no postings	No responses	No response
Barmouth Sailor's Institute	No listing	No listing	No response
Magic of Life	Only visitor postings, no responses	No responses	No response
Amgueddfa Lloyd George Museum	Regular postings, some responses	No responses	No response
Fourteen Locks Canal Centre	Regular postings, some responses	No responses	No response
Swtan Heritage Museum	Regular postings, no responses	No responses	No response
The Coffee shop, Ocean Lab	Regular postings, some responses	No responses	No response
Ocean Lab!	Only visitor postings, no responses	No responses	No response
Sea Trust	More about the organisation than the attraction	No Responses	No response
Folly Farm	Regular updates and responses	Responded to all comments	No response
Big Pit National Coal Museum (places)	Unofficial page, visitor comments, no responses	No listing	No listing
Big Pit National Coal Museum (NMW) (Pages)	Regular postings, no responses	No responses	No response
St Fagan’s National History Mus (NMW) pages	Regular postings, no responses	Only 1 response: to a negative comment	No response

St Fagan’s National History Mus (NMW) places	Unofficial page, no responses	No listing	No listing
Museum of Welsh Life, St Fagan’s	Unofficial page, no responses	No listing	No listing
Bodnant Garden (NT)	Regular postings, some responses	Sporadic responses	No response
Bodnant Garden (NT)	Unofficial page, no responses	No listing	No listing
Erddig (NT)	Unofficial page, no responses	No responses	Some events info
Dinefwr Park and castle (NT)	Unofficial page, no responses	No responses	No response
Parc Dinefwr	Unofficial page, no responses	No listing	No listing
Newton House (NT)	Unofficial page, no responses	No responses	No response
Harlech Castle (Cadw) pages	Regular postings, some responses	Responses to most negative comments. Answers to Q&A	No response
Harlech Castle (places)	Unofficial page, no responses	No listing	No listing
Harlech Castle (places)	Unofficial page, no responses	No listing	No listing
Caerphilly Castle (Cadw)	Unofficial page, no responses	Response to Q&A and some to negatives	No response
Caernarfon Castle (Cadw)	Unofficial page, no responses	Response to Q&A and some to negatives	No response
Llancaiach Fawr Manor (LA)	Regular postings, some responses	Only 1 response to negative	No response
Ruthin Gaol (LA)	Unofficial but 1 posting for event, no responses	No listing	No listing
Ruthin Gaol /Carchar Ruthin	Some postings, limited responses	No responses	No response
Pembrokeshire Falconry	Regular postings, some responses	No responses	No response
Principality Stadium	Regular postings, no responses to any comments	Response to some negative	No response
Pembroke Castle	Unofficial page, no responses	Only 1 response to negative	No response
Andrew Logan Museum of Sculpture	No listing	No listing	No response
Anglesey Sea Zoo	Regular postings, some responses	Response to all	No response
Bala Lake Railway	Regular postings, no responses	No responses	No response
Barry Island Pleasure Park	Unofficial page, no responses	No responses	No response
Brecon Cathedral shop & HC	Regular postings, no responses	No responses	No response
Brecon Mountain Railway x2	Unofficial page, no responses	Some responses	No response
Castell Henllys x 2	Unofficial page, no responses	Some responses	No response
Erwood Station Gallery x2	Regular postings, no responses	Some responses	No response
Fairbourne & Barmouth Railway x2	Regular postings, no responses	Some responses	No response

Foel Farm Park	Regular postings, responses to some comments	Few responses	No response
Gigrin Farm	Regular postings, responses to some comments	Few responses	No response
Gower Heritage Centre	Regular postings, responses to some comments	Reply to some Q&A (3), no reply to negative comments	No response
Gwent (usk) Rural Life Museum x3	Unofficial page, no responses	No responses	No response
Gwili Railway	Regular postings, responses to some comments	Replies to most postings and all QA (5)	No response
Gwydir Castle	Unofficial page, no responses	No responses, even to 2 Q&A	No response
Harlequin Puppet Theatre	Unofficial page, no responses	Responses from owner to the few comments	No response
Llanberis Lake Railway	Unofficial page, no responses	No responses	No response
Llangollen Railway x3	Regular postings, no responses	Responses to some negative comments	No response
Oakwood	Regular postings, responses to most comments	Responses to some questions	No response
Seaquarium Rhyl (Oceanarium)	Regular postings, no responses	No responses	No response
Oriel Plas Glyn Y Weddw	Regular postings, no responses	No responses	No response
Picton Castle	Unofficial page, no responses	Response to some	No response
Portmeirion x2	Regular postings, some responses	Responses to Q&A and negative comments	No response
Royal Cambrian Academy of Art	Regular postings, no responses	No responses	No response
Snowdon Mountain Railway	Regular postings, no responses	Responses to some comments	No response
Talyllyn Railway	Regular postings, no responses	Responses to some comments	No response
Techniquest	Regular postings, no responses	Responses to some comments	No response
Tenby Museum & Art Gallery	Regular postings, no responses	Responses to some comments	No response
The Greenwood Forest Park	Regular postings, responses to some comments	Responses to some comments	No response
Thousand Islands Expeditions	Regular postings, no responses	Responses to some comments	Response to some comments
Vale of Rheidol Railway	Regular postings, some responses	Responses to some comments	No response
Welshpool & Llanfair Light Railway	Unofficial page, no responses	Limited responses	No response
Teifi Valley Railway	No listing	Responses to some comments	No response

Appendix 11 **Tourism statistics for Wales 2006-2015 (Source: Welsh Government, 2016)**