A study of visitor satisfaction in tourism enterprises

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ABSTRACT

Satisfying customers is fundamental to the marketing concept and has long been recognised as important, firstly in the economic discipline and subsequently in marketing and in business generally. In a competitive marketplace customer satisfaction is closely linked to the ability of the organisation to deliver quality. Therefore, organisations rely on the feedback received from customers about how satisfied or dissatisfied they are with product and service provision and their perceptions of the value received.
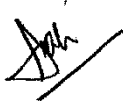
The study examines the various product and service attributes that contribute to visitor satisfaction and experience, and evaluates the role of price-value perceptions and behavioural intentions. This examination was undertaken by the study of three tourism enterprises operating in the heritage tourism area. These included Sovereign Hill, which is an historic goldfields township; Brambuk, which is an indigenous cultural centre located in the Grampians in Western Victoria; and Werribee Mansion, which depicts the life of a wealthy farming family in the early periods in Victoria.

This study has provided insight into the understanding of visitor satisfaction in tourism enterprises by evaluating the relationship between overall satisfaction and dissatisfaction and how these influence revisit and recommending behaviour, as well as the influence of price-value perceptions on satisfaction, experience and enjoyment. The study shows that price-value dissatisfaction impacts negatively on the willingness of visitors to recommend a tourism venue to others and that price dissatisfaction tends to impact negatively on satisfaction. The results provide some insight into what contributes to tourist satisfaction, enjoyment and experience.

The findings are expected to assist strategic and operational managers in their quest for continued quality enhancement and the provision and renewal of tourism products and services. It is expected that the findings will provide some guidance to managers, tourism operators, marketers and researchers alike in developing well informed data and analyses that are the key to strategic and competitive advantage.

DECLARATION

Except where explicit reference is made in the text of the thesis, this thesis contains no material published elsewhere or extracted in whole or in part from a thesis by which I have qualified for or been awarded another degree or diploma. No other person's work has been relied upon or used without due acknowledgment in the main text and bibliography of the thesis.

Shameem Ali   31 January 2012

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NOTE ON THE DBA RESEARCH PROGRAM:

This exegesis is part of a portfolio comprising the following requirements of the DBA:

Two Advanced Studies Units (ASU):

ASU1: Literature review and theoretical foundations
ASU2: Research methodology

Three Research Projects (RP):

RP 1:   Sovereign Hill study

RP 2:   Brambuk Indigenous Cultural Centre study

RP 3:   Werribee Mansion study

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CHAPTER 1

1. INTRODUCTION AND OVERVIEW

Customer satisfaction is a means of achieving several important business operation goals as well as providing competitive advantage for the organisation and fulfilling the strategic goal of market share. Operational advantage comes from repeat customer visits, positive word of mouth and recommending. This contributes towards increasing the customer base and introduces efficiency in marketing programs. A number of empirical studies (Anderson, Fornell & Lehmann 1994; Anderson & Mittal 2000; Heskett, Sasser & Schlesinger 1997; Rust, Ambler, Carpenter, Kumar & Srivastava 2004) have demonstrated the positive relationship between customer satisfaction and profitability. An organisation's financial performance is driven by quality and satisfaction. Therefore, the identification of the drivers of satisfaction and developing strategies to improve performance on product and service attributes that are valued by customers is crucial for long-term success (Anderson & Mittal 2000).

Many organization collect data on visitor satisfaction to identify issues relating to organizational performance and program effectiveness and to signal current and impending problems of quality perceptions and customer satisfaction. The reporting of visitor satisfaction data poses a number of difficulties for interpretation and analysis. The reporting of such data can be problematic and is open to misinterpretation, especially when aggregates are used. The organization often faces a range of limitations in data collection, with speed and efficiency given priority over research objectivity.

How an organization is able to manage and respond to the feedback received from customers provides an important source of competitive advantage (Kotler 2001). Changing consumer needs have to be analysed and understood on a continuous basis if the organisation is to remain responsive to market needs (Mai & Ness 2006). The ability to assess or judge customers' satisfaction levels is the critical first step towards customer retention and long-term competitiveness (Bowen & Clark 2002). Improvements in customer satisfaction not only give a competitive edge, but also can lead to higher

profitability (Anderson et al. 1994; Oh & Parks 1997). There is a large body of research that supports the links between customer satisfaction and organisational profits (Rust & Zahorik 1993; Bowman & Narayandas 2004; Keiningham, Perkins-Munn, Aksoy & Estrin 2005).

In program evaluation there are issues of both efficiency, which may related to service quality delivery, and effectiveness, which could relate to market relevance and the degree to which the organisation's products and offerings adequately reflect the current objectives and missions. The prime purpose of customer feedback and service evaluations is to introduce service quality improvements and to introduce programs that are relevant to the changing needs of the market. Therefore, program evaluations should be seen as managing tourism value and service quality enhancement.

Satisfying customers is fundamental to the marketing concept and has long been recognised as important, first in the economics discipline and subsequently in marketing and in business generally. In a competitive marketplace, how one is able to manage and respond to the feedback received from customers provides an important source of competitive advantage (Peters 1994; Kotler 2001). This is equally true in the services sector as it is in the goods sector and in areas such as marketing and tourism, where in the last three decades we have seen a concentration of research dealing with customer satisfaction (Cronin, Brady & Hult 2000; Pizam & Ellis 1999; Oh & Parks 1997; Oliver 1980).

There are a few underlying reasons which give rise to the study of customer satisfaction. First, customers are central to any business operation and the source of business revenue and profits (Bowen & Chen 2001; Oliver 1999) and meeting the needs and wants of customers is a central role of both profit and non-profit organisations (Kotler 2001). Second, in a competitive market, customer satisfaction is closely linked to the ability of the organisation to deliver quality (Parasuraman et al. 1985; 1988) so that customers can be retained (Yuksel & Rimmington 1998; Oliver 1999; Pizam & Ellis, 1999), and encouraged to remain loyal to the firm through the delivery of superior value (Caruana 2002; McDougall & Levesque 2000). Customer satisfaction is of strategic importance to an organisation because it is an antecedent to achieving marketing goals of increased market share and profitability, in addition to the generation of positive word-of-mouth

and achieving a degree of customer loyalty (Gronholdt, Martensen & Kristensen 2000; Anderson, Fornell & Lehman 1994). In a study on the Swedish Customer Satisfaction Index, Anderson et al. (1994, p.63) concluded that "firms that actually achieved high customer satisfaction also enjoyed superior economic returns".

Customer complaints are generally not directed at the firm, but at potential customers and instead of complaining to the firm, consumers choose to move to competitors. Consequently the firm loses not only that customer but many potential customers. An increasing body of literature dealing with complaining behaviour has emerged over the last decade (Akhter 2010; Kim, Wang & Mattila 2010; Volkov, Harker & Harker 2002; Santos & Boote 2003; Mattila & Wirtz 2006). Many consumers are polite by nature and this prevents them from complaining about negative service encounters. However, they are more likely to freely complain to other customers rather than the service provider. The advent of electronic communication and social media has provided new ways in which consumers can rapidly spread negative experiences. In terms of direct contact with the service provider, Mattila and Wirtz (2006), found that dissatisfied customers with a strong urge to vent their frustration leaned more towards remote channels such as a written letter or email.
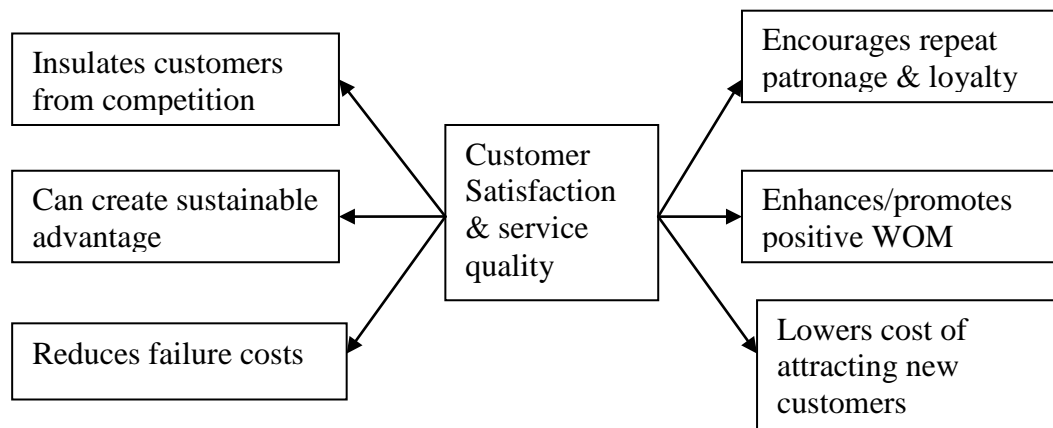
Figure 1: Benefits of customer satisfaction and service quality

Source: Lovelock, Patterson & Walker 2004, p. 90

Figure 1 shows that customer satisfaction is a means of achieving several important business operational goals as well as providing competitive advantage for the organisation and fulfilling the strategic goal of market share. Operational advantage

comes from repeat visits, positive word of mouth and recommending. This contributes towards increasing the customer base and introduces efficiency in marketing programs. Some empirical research (Anderson et al. 1994; Johnston & Michel 2008) has demonstrated the positive relationship between customer satisfaction and profitability. An organisation's financial performance and returns on shareholder value is driven by quality and satisfaction. Therefore, the identification of the drivers of satisfaction and developing strategies to improve performance of attributes that are valued by customers is crucial for long-term success (Anderson & Mittal 2000).

Tourism researchers have recognized that visitor satisfaction arises from the use of the tourism products and services at various destinations and that this depends on the products and prices on offer as well the quality of the services provided (Arabatzis & Grigoroudis 2010).

1.1 Study projects

This research provides a means of optimizing the value of market-based feedback from visitors to implement change and initiate continuous improvement. The purpose of this research is to investigate service attribute performance, and to identify service perceptions and satisfaction that can provide guidance for change implementation in tourism and service enterprises generally.

The three projects were selected because they are tourist destinations operating in a mature tourism market and facing similar concerns about declining visitor numbers. However, each has a different profile in terms of size, impact and popularity, allowing a study to be made on visitor satisfaction generally, and more specifically about how satisfaction is influenced by value received and the impact it has on recommending and revisiting behaviour. While all the study destinations relate to heritage, they are nevertheless unique in their offerings and costs associated with the visit. This assists in the study of satisfaction that visitor experience as well as those elements of products and services that can be a source of dissatisfaction or displeasures for visitors.

The following projects were completed and form the basis of this exegesis, which outlines the theoretical foundations of the research issues arising from the projects:

PROJECT 1: Visitor satisfaction study – Sovereign Hill. This project investigates visitor satisfaction levels at a premium-price destination.

PROJECT 2: Visitor satisfaction study – Brambuk. This project investigates visitor satisfaction in a non-price destination.

PROJECT 3: Visitor satisfaction study – Werribee Mansion. This study investigates visitor satisfaction in a mid-price tourism destination.

These individual stand-alone research studies address the following research issues and problems:

- What do visitors not like about tourism venues, such as Sovereign Hill, Brambuk and Werribee Mansion?
- What contributes to these negative perspectives and what influence does the price paid may have on satisfaction?
- How can tourism organisations utilise visitor feedback more effectively to improve service quality?

In order to use market-based data for program evaluation, managers would need to establish a system for making judgments on the performance of organizational objectives based on visitor feedback and response.

1.2 Theoretical foundations of research issues arising from projects

The individual research projects undertaken were based on the theoretical foundations undertaken as a part of the Advanced Studies Unit 1 (ASU1) Literature Review, which includes a comprehensive review of the literature on customer satisfaction. This comprised a review of theories and models relating to satisfaction, the range of customer perspectives on service quality and the various organisational performance perspectives. The conduct of the individual studies gave rise to some common and over-riding themes, the theoretical foundations of which are discussed in this section.

1.2.1   Customer Value - Influence of price on customer perceptions

Much of the customer satisfaction research neglects the role that price plays in determining value perceptions and satisfaction (Huber et al. 2001; Huber & Herrmann 2000). Voss, Parasuraman & Grewal (1998) contend that if performance is inconsistent with price charged, then expectation will have no effect on either performance or satisfaction judgments. There is also a stream of research that believes that consumers generally have a reference price points in memory for a good or service, that may be based on the last price paid, the price most frequently paid or the average of all the prices that have been paid for similar offerings (Zeithaml & Bitner 1996, p. 486). This internal reference price acts as a standard against which newly encountered prices are compared (Oh 2003).

Zeithaml (1988, p. 14) defines customer value as "the consumer's overall assessment of the utility of the product based on perceptions of what is received and what is given." This exchange forms the basis on which consumers make assessment of the overall benefits of the product or service and does not only include price-quality comparisons but also incorporates value judgments. Monroe (1990, p. 46) defines value as a trade-off between quality or benefits consumers perceived in a product or service relative to the sacrifice they perceive in paying the price, plus other acquisitions costs such as time and risks.

Consumers do 'mental accounting' in the 'give and take' process but their overall judgment of value would also be influenced by non-price extrinsic cues such as advertising messages and brand image (Dobbs et al. 1991, Zeithaml 1988). One would conclude from this that value is the perceived service quality relative to price. Value can be understood as a quality/price ratio that manifests itself in 'value for money' but it could also be understood as a price/performance ratio (Christopher 1996).

Voss et al. (1998) found that perceived performance has a stronger impact on satisfaction when there is price performance consistency but that price has a greater impact when there is a price performance inconsistency. In addition to making quality improvements service managers should improve value perceptions by managing the price perceptions of their customers (Varki & Colgate (2001). Their study found that price perceptions have

an important influence on the customer's value perceptions and overall customer satisfaction, where poor price perceptions increase the likelihood of switching and the likelihood of recommending to others.

Lovelock and Wirth (2003) propose a simple equation that value equals benefits minus costs. Organisational strategies that seek to enhance customer value would need to increase the benefits with the same cost structure so that price to the customer remains the same. Siems et al. (2008) in their study of zoo visitation found that many visitors did not have prior knowledge of entrance prices and assumed that the price would be lower than it actually was. They displayed displeasure when confronted with the actual price and this reduced their satisfaction level.

Consumers and firms have different types of power in the exchange relationship. For example, the price is set by the firm while the consumer can exercise their willingness to pay (Oliver 1997; Weiner 2005). Bolton and Lemon (1999) found that there was a strong relationship between customers' assessment of payment equity and satisfaction, such that the customers evaluate the exchange as more satisfactory when payments are lower than expected or budgeted. They suggest that customers evaluate the fairness of the exchange of inputs (price) and outcomes (service performance). Customers will seek to maintain payment equity in service relationships and will adjust items under their control, such as usage levels, in response to changes made by the firm, such as price changes and perceived changes in service quality. The customer is motivated by the need to budget and control expenditure which results in price having a direct influence on usage such that higher price is associated with lower usage. Consequently, managers should include measures of the fairness of the exchange relationship in customer satisfaction research.

The discussion of the literature about satisfaction and its antecedents, from the marketing discipline contends that price to some extent shapes and influences how satisfied consumers are with the exchange. This gives rise to the following propositions:

Proposition 1:

That there a relationship between price-value perceptions and satisfaction.

Proposition 2:

That negative price-value perceptions contribute to dissatisfaction with the visit and negative experiences?

1.2.2   Overall satisfaction and satisfaction with service attributes

Merely tracking the level of satisfaction may not deliver a true picture. Research focus should be on the drivers of overall satisfaction and their variance across different customer groupings or segments (Anderson, Pearo & Widener 2005). What matters to customers differs significantly based on their characteristics, which in turn has an influence on their evaluation of satisfaction (Cronin & Taylor 1994; Parasuraman et al. 1988). There is a body of research that has shown that individual differences in customer characteristics, such as age, gender, income and past experience are significant determinants of satisfaction (Mittal & Kamakura 2001; McDougall & Levesque 2000; Soderlund 2002).

Previous research shows that gender can be a key factor in satisfaction. A number of researchers (Anderson et al. 2005; Bendall-Lyons & Powers 2002; Mittal & Kamakura 2001) find that women report greater satisfaction than men. Some differences cited are that women understand their needs better than men (Bryant & Cha 1996), women are less likely to tell the truth about negative experiences than men (Mittal & Kamakura 2001), and that women place greater value on personal interactions compared to men (Lacohucci & Ostrom 1993).

Age and prior experience have also been shown to impact on satisfaction levels. Mittal & Kamakura (2001) contend that older people may be less likely to accept a given level of satisfaction but in general tend to be more satisfied than younger people. People with a broader range of past experiences (not necessarily limited to a given situation) would have a wider and well developed point of reference for service evaluation resulting in a higher ideal level of service (Zeithaml & Bitner, 2003). de Rojas and Camarero (2006, p. 54) found in their study that disconfirmation positively influences the visitor's pleasure dimension of emotions and when visitors experience pleasure this influences the visitor's level of satisfaction.

Emotions are temporary states caused by pleasant or unpleasant dispositions (Oliver 1997). Positive and negative emotions associated with a service encounter play an important role in defining satisfaction (Martin et al. 2009; Oliver 1993). The mood of the customer may play an important role in the moment of true satisfaction (de Rojas &

Camarero 2008), however, a 'good' mood may activate positive response to any minor incident (Zeithaml & Bitner 2003). Tourist emotional responses might be manipulated positively with a guided tour (Bowen 2001). Positive arousal influences visitor pleasure positively. Pleasure is strongly linked to consumer satisfaction and loyalty in experiencing tourism attractions as well as other destinations (Chebat & Michon 2003). Bigne et al. (2005, p. 841) found that positive disconfirmation (delight) influences visitor pleasure as well as visitor arousal and that the cognitive effect of disconfirmation on pleasure appears to be fully mediated by a visitor's arousal.

The disconfirmation models, which focus on the nature of expectations, do not indicate the importance of a particular dimension of quality (Zeithaml & Bitner 2003). The fact that a customer's expectation may have been disconfirmed in respect of a particular dimension of service delivery does not mean that dissatisfaction will result, especially if the dimension is perceived as unimportant (Bacon 2003). Therefore, by neglecting the emotional components of satisfaction the reliable predictions of customer responses may be compromised (Yu & Dean 2001; Barsky & Nash, 2002). Many tourism venues, such as museums, provide customers with avenues for fulfilling goal-directed positive emotional experiences that customers are consciously seeking when on holiday.

Chang (2008) found that the feeling of satisfaction is based on trade-offs between service attributes. However, each tourist has a different value judgment towards individual attributes and may give them different mental weightings. Their overall satisfaction level may be influenced by a single factor that is ranked more highly than others. For instance, Taiwanese visitors when involved with negative emotional experiences tend not to complain to service providers. The fact that they do not respond to dissatisfaction means that extra care is required in service interactions to ensure that any such emotion can be responded to through a better understanding of their needs (Chang 2008).

There is a general lack of research in this affective area of satisfaction compared to the cognitive dimensions. Collecting useful data on affective states would be problematic for organisations that generally rely on short instruments that can be completed quickly. Affective investigations are likely to be more intrusive for customers and costly for organisations because qualitative techniques, such as in-depth interview, may be more appropriate to understand emotions in various contexts (Martin et al. 2008).

The key questions for organisations committed to service quality improvements are twofold. The first is, how much quality is enough and the second is, when are service improvements most effective. These questions can be understood by the zone-of-tolerance concept, which has also been referred to as the zone of indifference (Yap & Sweeney 2007). One of the characteristics of service is its heterogeneity or variability in performance, so that some variation in service is normally accepted by consumers as an integral part of their decision-making processes.

According to the disconfirmation of expectation model, the way in which consumers evaluate service is by comparing what they perceive they have received with their expectations. Satisfaction results when the perceived service is equal to or greater than the expected service. According to Zeithaml et al. (1993) and Berry and Parasuraman (1991, pp. 57-63) customer expectations exist at two levels, a "desired level" and an "adequate level", which are the two standards by which customers make assessments of service performance. The desired level is the service the customers hope to receive and is a blend of what they believe 'can be' and 'should be' provided. The adequate service level is that which the customer finds acceptable, but is the minimum that they will accept. In between these levels there are zones of tolerance, and the service level in this zone is considered satisfactory.

Some understanding of what influences the desired and adequate service levels will assist organisations in formulating effective and efficient service enhancement strategies. The zone framework enables managers to introduce new service concepts and assess how sensitive customers are to service variations (Yap & Sweeney 2007, p.148). These authors suggest that it is vital for managers to exceed adequate expectations because "increased expenditure on quality continues to enhance perceptions and behaviors at the same rate beyond the zone-of-tolerance." Customers appreciate increase in service quality both within and beyond the zone of tolerance.

The service that visitors desire will be determined by their individual characteristics, and ultimately set by their personal needs and wants. The person's personal circumstances and outlook, as well as needs and desires will be shaped by social, psychological and environmental factors (Bateson & Hoffman 1999). The zone of tolerance therefore varies

between customers, and can vary from transaction to transaction for the same customer. Whilst the desired and adequate levels can fluctuate, the desired service tends to change more slowly and in smaller increments over time compared to the adequate service level (Berry & Parasuraman 1991).

In the case of tourism destinations and tourism services, expectations may not be well formulated because of infrequency of visits and the variety of options available to consumers. People are not constantly on holidays and when these opportunities arise they are unlikely to return to the same location in a short time span (Kozak 2001, p. 307). Although many tourists today appear to be well informed because of electronic information sources all visitor destinations are unlikely to be equally well researched. Therefore, the different attributes of a destination will not be matched by precise and confident expectations (Cadotte, Woodruff & Jenkins 1987). Service providers can also segment their customers and tailor their marketing strategies based on visitors' intentions of using information sources prior to, or during, their vacations (Kozak & Kozak 2008). This is because these information achieve different role, in that 'prior to' contribute to expectation formation information received 'during' is part of the offering. In addition, cultural differences are likely to influences expectations and perceptions as they do with attitudes and behaviours (Weiermair & Fuchs 2000). Such differences are likely to impact on and cause significant variation in the zones of tolerance.

Changes in expectations that can induce variation in the tolerance zones can arise due to a number of factors, including some that are controllable by organisations, such as implicit and explicit service promises communicated and others that are somewhat beyond organisational control, such as personal needs and past experiences. Word-of-mouth (WOM) communication is an important influence and may appear to be uncontrollable but can be 'managed' by the provision of superior quality. High levels of satisfaction with the service encounter generate positive WOM communication, but the converse is also true (Suskind 2002). Attracting new customers through WOM recommendations generates new income streams and increased revenue opportunities (Struebing 1996). Managers believe that while promotional efforts can increase overall revenue, WOM recommendations from friends and family does have a measurable impact on sales (Rust et al. 2004). Satisfied customers generate free WOM advertising and saves subsequent marketing costs (Brown et al. 2005; Luo & Homburg 2007).

Marketing communication, WOM and customers' past experiences influence their perceptions of service as well as their expectations (Zeithaml et al. 1993). How the service experience is perceived also depends on the service process itself and may be influenced by the role of contact employees, the physical environment and service attributes. In settings such as a museum, customers are to some extent aware that they are an important part of the service process and that the quality of service they receive depends on their attitude to service encounters (Bateson & Hoffman, 1999). In this instance, the role of both customers and employees needs to be understood by the parties if the adequate service levels are to be achieved as a minimum. A 'role' has been described by Soloman et al. (1985, p.99) as:

> a set of behaviour patterns learned through experience and communication, to be performed by an individual in a certain social interaction in order to attain a maximum effectiveness in goal accomplishment.

The forgoing discussion of the literature relating to marketing and leisure indicates that feedback about satisfaction in an overall sense may not provide information on performance areas that need to be improved. Therefore it is proposed that this study will explore the following proposition:

Proposition 3:

That because of the positive skewness of visitor feedback relating to satisfaction, organizations should investigate more closely the responses relating to individual program attributes to discover the nature and level of dissatisfaction.

1.2.3   Repeat visits and willingness to recommend

The leisure travel experience has been classified into five interdependent stages along a continuum: anticipation, travel to the destination, experience at the destination, return travel and the recounting of the memories of the experience (Borrie & Roggenbuck 2001; Steward & Hall 1992). The initial phase of anticipation incorporates the pre-trip expectation on which destination choices are made. An important part of this stage is the planning of the future leisure experience, which includes information gathering. There is also an emotional dimension to anticipation and these emotions are important

antecedents in decision-making processes (Perugini & Bagozzi 2001). Personal recommendation from friends, relatives and acquaintances is an important input in tourism decision-making, as are other external information sources such as advertising and the internet. In the disconfirmation of expectation theory, expectations are formulated pre-visit. Petrick and Beckman (2002) identify the importance of the tourist's information satisfaction as an ingredient of overall satisfaction. Based on the information from various sources and reconciling these with personal needs and constraints, the tourist selects a destination. Anticipation is more relevant in first visits and there is greater reliance on information sources to form expectations. This is generally not the case with subsequent visits to the same destination, suggesting the prior experience is far more important.

In the case of many frequently purchased goods and services loyalty and repeat purchase appears to be of greater importance. In tourism markets there is normally a considerable time span between visitors returning to a particular destination so loyalty may be less significant. However, tourist satisfaction is a direct antecedent of the willingness to recommend the destination to friends and relatives (Bigne, Mattila & Andreu 2008). Satisfaction with a visit will result in positive word of mouth and, as de Rojas and Camarero (2006) found, the higher the level of customer satisfaction the greater the willingness to recommend the visit to others. Satisfied visitors also tend to intensify their experience during the visit so that their stay would be longer and they are likely to purchase more items of souvenirs (de Rojas & Camarero 2008).

In a study of museum visitors, Huo and Miller (2007), found that there is a strong relationship between satisfaction and intention to recommend. They also indicate that the services rendered by museum staff play a major role in increasing the level of satisfaction and a visitor's willingness to recommend to others. Traditionally museums have tended not to be customer-focused but placed emphasis on the management of their collections. Visitors to cultural facilities such as museums and art galleries tend to rely more on personal recommendations (Harrison & Shaw 2004). Visitor evaluation of such a service does not exclusively occur at the end of the service but in incremental steps during the experience (Harrison & Shaw 2004).

Most tourism models investigating satisfaction tend to rely on positivist approaches in which the tourist is considered a rational being that evaluates the adequacy of tourism products and services based on a mental cost-benefit comparison. A trip is taken with certain expectations and evaluation is based on the degree to which these expectations are met, not met or exceeded. This disconfirmation paradigm has been widely used in tourism research. In a 'vacation tourist behaviour model' developed by Moutinho (1987) it is claimed that there are three stages in the tourist decision process: pre-purchase influences and decision-making, post-purchase evaluation and future decision-making. The identification of these clearly defined stages may be an over-simplification and does not apply in case of many tourism products. Tourism products like museums could be regarded as requiring high involvement participation on the part of the visitor and the 'journey' through a museum is itself an evaluation process. The tourist may be either satisfied or dissatisfied at the end of it and this is not necessarily through a mental calculation of cost-benefits at the end.

Whilst overall satisfaction is the main direct determinant of intention to revisit, the nature of satisfaction is however, multidimensional (Alegre & Cladera 2009). This should be a source of encouragement for managers at destinations to dedicate more effort to improving the products on offer in order to increase the likelihood of revisits and recommendation to others. Assessing and evaluating the aspects which have the greatest impact on behavioural intentions should be critical in the restructuring of the destination's offerings. Nowacki (2010) found a significant correlation between 'perceptions of quality' and 'satisfaction of visitors' and that satisfaction with the overall value received positively influences intentions relating to further visits, recommending to others and paying for admissions. The main determinants of the intention to return to the destination for the next holiday are past switching behavior, switching costs and specific variety seeking, whereas the assessment of the destination (image and satisfaction) does not have a significant effect. However, in the long term, satisfaction becomes the most relevant antecedent of intentions to return, specific variety seeking maintains its influence, and past switching behavior and switching costs become irrelevant (Bigne, Sanchez & Andreu 2009).

The forgoing discussion indicates that visitors must be satisfied if they are to return, bring others or recommend the venue to others, and gives rise to the following proposition to be studied:

Proposition 4:

That there is a relationship between the visitor's willingness to revisit and/or recommend and their price-value perceptions

1.3 Exegesis research questions

Based on the previous section this exegesis will examine the following research questions:

Research question 1: Is there a relationship between price-value perceptions and satisfaction?

Research question 2: Do negative price-value perceptions contribute to dissatisfaction and negative experiences?

Research question 3: Do aggregate measures of skewed satisfactions scores distort the managerial perceptions of visitor feedback?

Research question 4: Do price-value perceptions of visitors impact upon their willingness to recommend the venue to others?

1.4 Research methodology

This section provides a summary of the methodology used in the three projects undertaken and discusses the approaches taken by the various studies. This draws on Advanced Study Unit 2: Research Methodology which was completed during the DBA studies and covered a commentary and analysis of the broader methodological directions and options that are available to a researcher.

1.4.1   Research considerations

In research activity there are a number of stakeholders, such as those that participate in research as subjects, the organisation being studied, and the researchers. Those from whom information is collected or those who are studied by the researcher are participants and their rights must be protected. The researcher is also a stakeholder and must abide by rules of ethical conduct. Appropriate university ethics committee clearances were obtained for the research conducted. A body funding the research may have a vested interest in a particular finding or the way research is presented. The independence of the parties is important in the maintenance of ethical standards of research (Kumar 1996).

In data collection, the wasting of the respondent's time may be deemed to be unethical. Therefore, the research purpose and objectives must be worthy and of some value to society. If the research is going to be of some benefit to society directly or indirectly, it is acceptable to ask questions provided that the respondent's informed consent is provided. Therefore it is important to justify the relevance of the research, the reasons for which data are being collected and how they will be used. During the data collection phase staff were available to explain the reasons for the study and how findings were to be used. Respondents must be in a position to give such informed consent. Sharing information about a respondent with others is unethical (Kumar 1996). It is important to maintain confidentiality and respondents must be willing and able to provide information.

The researcher has obligations in the research process. One such obligation is the use of an appropriate methodology. This could apply to sample selection (which could be biased), the data collection instrument must be valid, and conclusions should be drawn that are justifiable. Sometimes organisations may commission research to justify a

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decision already made. Participation in such an exercise will be unethical. University ethics committee approval was granted and the Ethics Final Report is attached as an Appendix.

In this study, three organisations were involved, all of which had the responsibility for service delivery and operational management. The interest of these organisations in this research was to understand satisfaction levels to guide quality improvements for the future. These organisations are all involved in heritage tourism area and had for the few years prior to the conduct of the study, been experiencing declining visitor numbers and wished to measure satisfaction levels, visitor concerns, the nature of their visit experiences and sources of information visitors used in decision making. The Advanced Studies Unit: Literature Review which was a component of the DBA program, confirmed that these are the key issues for organisations and are critical information for strategic planning as well as operational planning.

Customer satisfaction can be estimated with a single item, which measures the overall satisfaction (Fornell 1992; Spreng & Mackoy 1996; Bigne et al. 2001). Mai and Ness (2006) argue that the degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes, while Yoon and Uysal (2005) stress that satisfaction is multi-dimensional and therefore any attempt to measure it must consider a range of variables.

One method often used for determining which attributes are most important in customer satisfaction is gap analysis. In the gap analysis method the relative importance of each product or service attribute is determined and compared with customer expectations, identifying the gap between the actual and the expected (Teas 1993; Berry & Parasuraman 1991). Management improvement efforts would then be directed towards those attributes with the largest gaps. The relationships and interactions between attributes appear to be ignored, as do the contributions of these attributes to overall satisfaction. Cronin and Taylor (1992) propose an alternative to this and suggest measuring only performance and the contribution of the attribute towards overall satisfaction.

McLean (1994) and Kawashima (1999) found from studies relating to museums that customer satisfaction is an important element of operational (achievement of objectives) success and that customers' views should form an integral part of marketing strategy. Improvement in customer satisfaction, not only gives a competitive edge, but can also lead to higher profitability (Anderson et al. 1994; Oh & Parks 1997).

The foregoing discussion indicates that there are a number of perspectives from which the notion of customer satisfaction can be investigated. Customer satisfaction is linked to individual needs and desires on the one hand, and customer expectations, which relate to knowledge of products that are consumed, on the other. Previous studies have conceptualised customer satisfaction in terms of an individual's response that results from comparing a product's perceived performance with their expectations (Lovelock, Patterson & Walker 2001; Oliver 1981). If actual performance or outcome from consumption is close to expectation, then the level of satisfaction experienced will be positively influenced by those expectations. However, if actual performance is sufficiently different from prepurchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgment (Sherif & Hovland 1961).

1.4.2   Survey item generation

The generation of survey items was based on the 'visitor value management model' developed in the Advanced Study Unit relating to the review of the literature, which identified issues relating to visitor expectation formation as well as the programs and services contributing to the visitor experience. The first block contained six items related to visitor profile to determine gender, age, overseas or domestic origin, whether first visit, whether on packaged tour, and if staying away from home overnight.

The second block related to the level of satisfaction experienced. This was measured by 10 survey items generated from tourism literature and derived from offerings by the organisation. These were measured using a six-point scale. The third block contained 20 statements and sought the respondent's level of agreement or disagreement, using a five-point scale, between agree strongly and disagree strongly. These items related to service perceptions and service performance. In addition to this, visitors were asked to record the time taken by the visit and if this was enough time to satisfactorily complete the visit.

Finally, respondents were asked to comment on their experience and raise any issues that may be of value to management for future planning and service experience improvements.

The survey items fell into two categories. The first category sought scaled responses on the visitors' level of satisfaction. SERVQUAL, which views service quality as the gap between the expectation and the perception of the service experience, is commonly regarded as the dominant measure of service quality. It was also noted that this scale did not offer consistent results when in a number of industries and situations (Carman 1990). Performance-based measures were better able to explain service quality (Churchill & Suprenant 1982). The two dimensions of service quality are identified by Gronroos (1990), as technical and functional quality. Technical quality is the outcome dimension, what the consumer is left with once the service process is over and is the technical solution to the problem. For example, in a museum setting, an objective might be to provide visitors with a learning and education experience. This would be part of the 'technical' quality dimension. If visitors were paying for such a service then the value received in exchange for the price could be classified as technical quality.

The main categories of data collected for the various research projects used in this study were: tourist satisfaction, expectation and expectation formation, especially those relating to awareness and information sources, and the likelihood of revisiting and recommending. These are summarised below as a way of providing the justification for their inclusion in the projects.

Tourist satisfaction and expectation

Tourist satisfaction is important to successful destination marketing because it influences the choice of destination, the consumption of products and services, and the decision to return (Kozak & Rimmington 2000; Oppermann 2000; Yoon & Uysal 2005). An assessment of tourist satisfaction has been attempted using various perspectives and theories. Most of the studies conducted to evaluate consumer satisfaction have utilized models of expectancy-disconfirmation (Chon 1989; Huh & Uysal 2003; Garyfallos & Grigoroudis 2010), equity (Fisk & Coney 1982; Fisk & Young 1985; Heskett, Sasser, & Schlesinger 1997; Oliver & DeSarbo 1988; Oliver & Swan 1989), norm (Cadotte, Woodruff, & Jenkins 1987; Latour & Peat 1979), and perceived overall performance

(Pizam, Neuman, & Reichel 1978; Tse & Wilton 1988, Kano 2001). Therefore, this study utilized expectancy-disconfirmation theory, equity theory, norm theory, and perceived overall performance in order to measure tourist satisfaction.

Especially, based on Knutson et al. (2003), Kozak and Rimmington (2000), Jensen (2008) and Yoon and Uysal (2005), and being mindful of the range of tourism products and services available a number of items were included in the surveys. The variables were measured on a 6-point Likert-type scale ranging from 6 (Very high satisfaction) to 6 (Very low satisfaction)

Items for measurement of tourist satisfaction and experience included:

1. The general environment and atmosphere.
2. The way things are presented and displayed.
3. The ease with which you could get information and advice.
4. The clarity of signage and labeling that made finding things easier.
5. The knowledge and accessibility of staff.
6. Value for money.
7. The range of things to do.
8. The level of hygiene and condition of facilities
9. The learning and education focus.
10. Overall satisfaction level with this visit.

A number of tourist satisfaction and experience items were measured using a 5-point Likert-type scale ranging from 5 (Strongly disagree) to 1 (Strongly agree)

11. I would rather have spent the time elsewhere.
12. I learnt about things I did not know before.
13. I was impressed with the variety of things to see.
14 All things considered, the visit was a good experience

Finally, the expectation and expectation formation items used were:

15. Prior to visit, how long did you expect to spend.
16. Actual time spent.
17. I expected the visit would take longer than it did.
18. I expected a greater variety of displays and information.
19. I expected to see more than I did.
20. What I experienced here met my expectations.
21. I came here with clear expectation about what I would see.
22. There was more to this place than I realised.

Awareness and information sources (expectation formation)

Sources of information have a strong effect on the perceptions of a provider's effort at heritage destinations and together with perceived value of quality impact on their willingness to recommend (Nowacki 2010). Familiarity with a venue has been mostly measured by a single indicator, and is often referred to as previous trip experience (Hu & Ritchie 1993; Milman & Pizam 1995). However, this study used a range of items to measure destination awareness based on Oh's (2000) study, which explained the effect of awareness and price on customer satisfaction and behavioural intentions. He reported that the reliability (Cronbach's $\alpha=.97$) of the scale was reasonably high. Mistilis and D'ammbra (2010) claim that focus on perceived quality of information resources facilitates adding value to the visitor experience.

Items for measurement of venue awareness and information sources were:

1. How did you find out about this venue?
2. What sources of information were used?
3. What were the most influential in your decision to visit?
4. Did you know of the venue before your visit to the area?
5. The venue was easy to find.
6. Had visited previous.

Likelihood of revisit and recommending

The likelihood of repurchase or revisits and their consequent behavioural intentions is one of the critical indicators used to measure the success of a marketing strategy (Yoon & Uysal 2005). With such importance, marketers and researchers have generally shared a fundamental understanding of what loyalty means and how it is created. Zeithaml and Bitner (1996) used behavioural intentions in order to measure loyalty. Their measurement of loyalty was divided into two domains: loyalty subscales and willingness to pay more subscale. The primary determinant of intention to return is overall satisfaction (Alegre & Cladera 2008).

The following items related to intentions of revisiting and recommending were measured on a 5-point Likert-type scale ranging from 5(strongly disagree) to 1 (strongly agree):

1. I would feel comfortable in recommending this venue to others.
2. This is a good place to bring friends and relatives.

1.4.3   The choice of scales

The Leisure Motivation Scale (LMS) has been used to identify variables that should be measured to determine visitor satisfaction. The LMS identifies four motives that determine satisfaction derived from leisure pursuits. The first involves the intellectual motive involving activities such as learning, exploring, discovering and may involve thoughtfulness and imagination. The second is the social motive, which relate to and involves the need for friendship and interpersonal relations. The third is the competence-mastery motive which relates to the need to "achieve, master, challenge, and compete". The fourth is the stimulus avoidance motive seeking relaxation, calmness, solitude and the breaking away from routine (Beard & Ragheb, 1983, p. 225).

Churchill and Surprenant (1982) argue that the type of product category under consideration would have an effect on how performance expectation influences satisfaction. If actual performance is close to expectation, then the level of satisfaction experienced will be positively influenced by those expectations. However, if actual performance is sufficiently different from pre-purchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgment (Sherif & Hovland 1961). Huber, Herrmann and Henneberg (2007) argue that to analyse the relationship between customer value and customer satisfaction, it is necessary to use a multidimensional construct. Therefore, visitor satisfaction data collection should be based on at least two dimensions.

In social science research where concepts are complex, single item responses are inadequate for explaining relationships between variables. Therefore, a scale is a composite measure of a concept, generally requiring the measurement of a number of items to enable proper explanation. For example, SERVQUAL provides a scale for measuring service quality. Generally, in the social sciences, getting insights into concepts requires the measurement of multiple items that may relate to various service attributes.

The measurement of multiple items helps reliability and avoids misinterpretation, which can occur with single-item measurements. It is generally the rule that the more complex the concept, the greater the number of items is required to understand it (de Vaus 2002).

In addition to being valid and reliable, the research instrument should be capable of measuring finer distinctions that need to be revealed in social research measuring shifts in attitudes or degrees of satisfaction. Scales that have equal parts provide a greater scope for more refined measurement. In relation measuring satisfaction, expectation and perception will vary amongst respondents because of personal characteristics, personal factors and situational factors. Interval - scaled responses are more likely to explain the variation in satisfaction caused by these factors.

In the questionnaire design stage, careful consideration was given to the choice of scales as well as the choice of the number of categories. One important and overriding consideration was that visitors who complete the voluntary survey at the end of their visit may face time pressures. The number of categories in the scale and the number of items that needed to be addressed had to be carefully balanced with time taken to respond. Therefore, it was considered that 7 – point scales would unnecessarily increase the complexity and discourage thoughtful response. The number of items was limited to the minimum that would be required to address the performance objectives.

The measurement used to address the satisfaction level was a 6 – point forced scale, so that there was no mid-point which could be used to give a neutral or no opinion category. As explained above, this was done more for operational reasons with a view to using the data to develop decision benchmarks. One weakness of this approach is that in cases where the respondent had not formed an opinion about the item they would still be forced to take a position on the item. There is, in such cases, always an option for the respondent not to respond to the particular item, and would be registered as a "missing value."

The first dimension is to seek information on satisfaction levels reached across a range factors deemed pertinent to the individual with respect to the activity, such as a visit to a museum. As discussed previously, there are instrumental (maintenance factors) and expressive indicators (core experiences or benefits) of satisfaction (Noe 1987; Czepiel &

Rosenberg 1974). This can be measured using a numerical scale. In this study the level of satisfaction, across a number factors, was measured using a 6-point scale (with 6 being Very High and 1 being Very Low).

In the literature, any attempts to measure opinions or attitudes typically utilise either a 5-point or a 7-point scale, which provides a mid-point with equal number of options on either side. The purpose of selecting a 6-point scale was the desire to present a continuum so that a benchmarking decision system could be developed. Often in a Likert-type scale mid-points can represent "unsure" and would be mathematically unusable for benchmarking purposes unless the cases in the mid-point were ignored from the analysis. That is not to say that these cases are unusable or meaningless, because they may possess "hidden" or underlying meaning, especially in relation to what respondents may not be saying.

The second dimension is to seek information, opinions and attitudes on "performance", as suggested by the literature discussed in the previous section. In order to collect relevant information on "performance", one needs to understand the nature and characteristics of the industry (if relevant), and more specially, the missions and objectives of the enterprise. This will identify the issues that the research must address if visitor satisfaction is to be meaningfully measured.

Consequently, the visitors were asked to indicate their level of agreement or disagreement to 20 items (statements) using a 5-point Likert scale (5 = Agree Strongly to 1 = Disagree Strongly). These items were selected based on the typical objectives that the organisation was deemed to be pursuing, using the literature and publicly available information.

1.4.4   Data collection procedure

The data collection, using the self-administered survey forms, was conducted over several days, incorporating weekends. Posters were placed around the relevant venues notifying visitors that a survey was being conducted. A special area was set aside where survey forms could be completed. Post boxes were placed at two locations to deposit the completed forms and blank forms were readily available at three locations at the venues.

Data analysis was undertaken with SPSS Version 18.

Study Population

A population may be defined as any complete group of entities such as people, organizations, institutions, or the like that share some common set of characteristics in agreement with the purpose of the study under investigation and about which researchers want to be able to draw conclusions and plan to generalize (Zikmund & Babin 2010). Because the objective of the study is to investigate tourist satisfaction with the respective destinations or venues, the population of the study is leisure tourists.

Sampling

Sampling is the process of selective observation using a small number of units of a larger population to draw conclusions about the whole population, while a sampling frame is the actual list or quasi-list of elements (sampling units) from which a probability sample may be selected (Zikmund & Babin 2010). The sample of the respective studies were visitors to the venue covering periods up to three weeks. Respondents were selected on the basis of convenience, based on their willingness to participate.

Sample Size

Generally, multivariate analysis requires a much larger sample since estimation methods (e.g., maximum likelihood) and tests of model (Chi-square test) tend to provide improved results with a larger number of cases. Therefore, these methods are based on the assumption of a large sample. Several researchers have different guidelines on the definition of "large" (Anderson & Gerbing 1984). Even though there is no correct sample size in the absolute rule, the generally recommended sample size ranges from 100 to 200 to ensure the appropriate use of maximum likelihood estimation (Hair et al. 2010). Sample sizes of 200 observations or greater are preferred as they increase the accuracy of parameter estimates (Marsh et al. 1988). Elsewhere, it has been suggested that the ratio of subjects to estimated parameters be between 5:1 and 10:1 (Hair et al. 2010). There are some recommendations in the literature regarding the minimum sample size required for appropriate statistical inferences. Small samples require careful considerations of the conditions for valid statistical power and inference.

In accordance with the sample size recommended by previous studies, minimum of 100 observations is minimally acceptable, and a more appropriate level of 200 observations is preferred.

1.4.5   Overview of data collected by projects

PROJECT 1: Visitor satisfaction study – Sovereign Hill. This project investigates visitor satisfaction levels at a premium-price destination.

In the questionnaire design stage, careful consideration was given to the choice of scales as well as the choice of the number of categories. One important and overriding consideration was that visitors would complete the voluntary survey at the end of their visit, but may face time pressures. The number of categories in the scale and the number of items that needed to be addressed had to be carefully balanced with time taken to respond.

Visitor Satisfaction was measured using an on-site survey and data were collected using a Visitor Survey questionnaire. The questionnaire included questions relating to:

- Attractions visited during the visit;
- Expectations and satisfaction achieved;
- Time spent;
- Information sources used;
- Use of services and facilities;
- Visitor groupings;
- Likelihood of revisiting and recommending;
- Visitor profiles and comments.

The survey consisted mostly of questions requiring a yes/no answer while some questions, using Likert scale statements, measuring satisfaction and attitude toward Sovereign Hill features. In addition, visitors were given the opportunity to suggest improvement that could be made.

The data collection, using the self- administered survey forms, was conducted over six months, incorporating weekends, holiday periods and weekdays. Post boxes were placed

at the exit point to deposit the completed forms and blank forms were readily available at the entry point. Data collection, using self-completion survey forms, took place on the grounds of Sovereign Hill during 2009 covering peak as well regular visitation times. Data collectors were on-site to provide information about the study and to assist respondents with completion of the survey, if required. A box was placed at the exit to deposit the completed forms.

A useable sample of 436 visitors was obtained.

PROJECT 2: Visitor satisfaction study – Brambuk. This project investigates visitor satisfaction in a non-price destination.

Prior to the development of the final questionnaire, a pilot study was conducted to test the responses, the ease with which the questionnaire was completed, and the amount of time that completion required. A total of 18 self- administered questionnaires were completed and 5 interviews conducted, where the researcher asked the question on the form and recorded the response, to evaluate the understanding of the meaning of the questions and their reference.

The completion process for the self- administered surveys was timed and this ranged from 8 minutes to 23 minutes, with an average 14 minutes. The interviews identified a number of issues. Questions requiring a categorical response (yes/no) did not present any problem, nor did the comments section of the survey. Some statements were reworded, and some were combined in order to reduce the response time to approximately10 minutes. Even from the small number of interviews, a number of issues were raised that resulted in some statements being removed and others added. This process was found to be extremely useful in refining and rearranging the survey form and reducing its overall size, without compromising the integrity of the data. The pilot stage also involved a number of informal discussions with visitors about their experiences from the visit.

The final survey form was approved by both Brambuk management group and Parks Victoria, after some minor word changes. The data collection focused on the satisfaction of visitors with organisation performance across ten operational objects that the organisation was deemed to have responsibility to deliver.

The data collection, using the self-administered survey forms, was conducted over 17 days, incorporating three weekends. Posters were placed around the Centre notifying visitors that a survey was being conducted. A special area was set aside, with a capacity to seat 4 people. Post boxes were placed at two locations to deposit the completed forms and blank forms were readily available at three locations at the Centre.

There were 522 usable forms returned, out of which 230 included comments with ideas and suggestions to improve the Centre. A large number of these comments covered multiple issues. There were 330 comments received in total, relating to the following areas: general positive comments (67); displays, activities and information (95); signage (22); café, shop and amenities (53); staffing and staff interactions (16) and other comments not elsewhere included (27).

A second survey was conducted off site, in the town centre of Halls Gap. This comprised a short interview with 100 randomly selected visitors and local residents were excluded. The purpose of this "off site" survey was to ascertain the level of awareness of the Brambuk and National Parks Information Centre, which is located about 3 kilometers outside the town. This interview survey also asked about previous visits, intention to visit and satisfaction ranking on a scale of 10 (excellent) to 1 (poor). This was considered a critical part of the research to get a picture of the "missed market."

PROJECT 3: Visitor satisfaction study – Werribee Mansion. This study investigates visitor satisfaction in a mid-price tourism venue.

The methodology included quantitative and qualitative analysis. The key study themes were visitor satisfaction, visitor experiences and community awareness.

 Visitor Satisfaction was measured using an on-site survey and data was collected using a Visitor Survey questionnaire. The questionnaire included questions relating to:

- Attractions visited during the visit;
- Expectations and satisfaction achieved;
- Time spent at the venue;
- Information sources used;

- Use of services and facilities;

- Visitor groupings;

- Likelihood of revisiting and recommending;

- Visitor profiles and comments.

The survey consisted mostly of questions requiring a yes/no answer with some questions, using Likert scale statements, measuring satisfaction and attitude toward Werribee Park features. In addition, visitors were given the opportunity to suggest improvement that could be made. Data collection, using self-completion survey forms, took place on the grounds of Werribee Park from February to April 2010. This is considered the peak visitation time for Werribee Park. Data collectors were on-site and a poster was placed at the entrance to encourage participation. A box was placed at the exit to deposit the completed forms. A useable sample of 428 visitors was obtained.

Exegesis study sample is based on the combination of the three projects and includes a process of data cleaning, which eliminated cases where the relevant data were missing or incomplete. After this process a total of 1386 usable cases were identified and will comprise the data set for the analysis and discussion to be presented in Chapter 2.

1.5 The significance of the research

This research project supplements the pool of current literature by developing a conceptual model to underpin customer satisfaction data collection and analysis in a tourism enterprise setting. Although satisfaction surveys in various forms are widely used by many customer-oriented organizations they are often not effectively utilized to bring out service quality improvements. This project links satisfaction data collection and analysis to organizational objectives and functional programs with a view to delivering decision tools for practitioners. The implementation of the model presented will enable practitioners to determine the extent to which quality goals and targets are being met and identify service attributes which are falling short in meeting customer expectations.

The research relates to three different organizations offering distinct tourism products. Therefore, it is expected that it will have wider application in a range of tourism and related enterprises. Managers will be able to test and validate service performance efficiently and effectively and will find the tool particularly valuable for ongoing monitoring of service performance.

1.6   Chapter summary

This chapter has been devoted to outlining the various projects undertaken during this study, developing the theoretical foundations on which the research questions are grounded, and presenting the research methodology used in this study and its various components. The study foundations are based on Advanced Study Units (ASU) 1, which deals with the review of relevant literature and ASU 2 discusses the various research paradigms followed by the identification of the qualitative and quantitative approaches, leading to the justification of the choice of the research paradigm. A research framework was proposed and the survey instrument design considerations were provided including the research population, sampling, and data collection method. Thirdly, the measurement scales and constructs were explained. Finally, an explanation was provided for the sample data set, which will form the grounding for the analysis and discussions in chapters 2 and 3.

Chapter 2 will outline and discuss the findings from the three stand-alone projects conducted as a part of this study, including a comparative analysis of these projects and discuss their practical and managerial implications. Chapter 3 contains the analysis and discussion of findings that arise from the projects based on the analysis of the combined data set and will start with the testing of the reliability of the data and the general profile of the respondents, setting the groundwork for the statistical analysis to be undertaken in the subsections within that chapter. Chapter 4 contains the conclusions from the study and includes a summary of the findings, their managerial implications, the academic contributions made by the study, the limitations of the research and recommendations for future research. This is followed a reference list and the ethics final report as an appendix.

CHAPTER 2

2 DISCUSSION FROM FINDINGS OF INDIVIDUAL PROJECTS

There were three individual visitor satisfaction research projects undertaken that deal with research issues identified in Chapter1 and also discussed in ASU 1: Literature Review and those that were identified by the participating organisations as important research information for their future planning. As discussed in Chapter 1, many of the organisational needs for research information were similar, as were their desire to improve the quality of service provision and enhance visitor satisfaction and overall experience. All three of the organisations at the time of the studies were experiencing declining visitor numbers and wished to measure satisfaction levels, visitor concerns, the nature of their visit experiences and sources of information visitors used in decision making. The literature review confirmed that these are the key issues for organisations and are critical information for strategic and operational planning.

In this chapter, the findings and conclusions from each of the projects will be discussed. This chapter will also discuss some of the specific findings that relate to the individual projects because while the nature of businesses is common there are nevertheless, operational, managerial and strategic differences between them as indicated in Chapter 1. While each of the projects are stand-alone studies addressing specific research questions, there were some aspects that were common to all cases. As all the studies centered around overall visitor satisfaction, specific aspects relate to satisfaction and dissatisfaction with services and products (including value received), the sources of information used in expectation formation and the likelihood of recommending the venue to others.

There were also aspects that were specific to each of the organisations studied or specific data requested by the organisation because it was deemed to be important for their future planning requirements. These relate to new and repeat visitors, the actual and expected time spent at the venue, visit planning period, and the likelihood of revisit.

This chapter will commence with an analysis of the findings, as described above, for each of the projects undertaken and will be followed by a comparative analysis of

respondent profiles of the three studies, an analysis of the time spent visiting each venue, and the pre-visit information sources utilized by visitors.

2.1 Project 1: Sovereign Hill Study

This is a high price/cost destination and the case provides insights into how the value perceptions are influenced by the service quality experienced. However, chapter 1 and ASU1 (Literature Review) showed that price is only one of many factors consumers consider in service evaluations and their satisfaction (Fornell et al. 1996, Varki & Colgate 2001). How an organization performs (perceived performance) has a stronger impact on satisfaction when there is some consistency between price and performance (Voss et al. 1998).

Satisfaction levels

Visitors were generally very satisfied with the visit recording an overall satisfaction mean score of 5.02 out of a maximum 6, with a standard deviation of less than one, indicating that the majority felt the same way about their visit. Visitors were particularly pleased with the general environment and atmosphere (5.23 ± 0.78), the way things are presented and displayed (5.23 ± 0.85), the knowledge & accessibility of staff (5.14 ± 1.02) and the learning and educational focus (5.09 ± 0.91). However, visited visitors reported less satisfaction with value for money (4.55 ± 1.3), the level of hygiene (4.81 ± 1.13), the range of things to do (4.86 ± 1.11), the ease with which you could get more information & advice (4.90 ± 1.08) and the clarity of signage and labelling that made finding things easier (4.97 ± 1.01).

Satisfaction and value

Many visitors did not consider that their experience represented good value for money as this had the lowest mean score. It also had the highest standard deviation of 1.3 indicating that the distribution was rather flat and that there was some degree of unhappiness with the cost of the visit, with about 20% of visitors indicating low satisfaction. In relation to the items where there was less satisfaction, there was also a greater variance in the responses, indicating that greater number of visitors rated these with a lower satisfaction score.

Generalised satisfaction scales are not sufficient in themselves to determine how visitors may actually feel about a product, service or issue. In this study, in addition to satisfaction levels, visitors were asked to indicate their level of agreement or disagreement relating to "performance" items. The items were selected based on the literature review of studies relating to cultural centres and museums, among others.

Factor analysis was used to group the range of variables studies into three factors: "experience & enjoyment", "displeasures (causes of)" and "services". The variable "this was an expensive day out" grouped into the "causes of displeasures" factor. The majority of respondents (90%) agreed that the visit was a good and enjoyable experience. A third of the respondents encounted aspects of the visit that led to "displeasures".

Analysis of those who indicated some dissatisfaction with price indicated that there were 62.5% of visitors who believed that the visit represented "good value for money", with 13.1% claiming that the visit did not represent good value for money and the remaining 24.4% being indifferent or non-committal. On the other hand, 52.4% believed that this was an expensive day out, with 17.3% being pleased with the cost with respect to the value received. More detailed analysis was undertaken by combining these two variables in order to understand the segments that expressed some dissatisfaction with price and the degree to which this influenced their assessment of satisfaction with the visit.

Dissatisfaction with price and value

Respondents who expressed dissatisfaction with price-value, comprised just over 20% of the visitors. However, first time visitors were more likely to express this view, but this feeling was no means limited to first time visitors. There was no significant difference between the domestic and overseas visitors. Those under the age of 40 years comprised two-thirds of those who were dissatisfied with the costs associated with the visit. There was no significant difference in the visit planning time horizon of those who were satisfied or dissatisfied with the price. Despite the dissatisfaction with price, 70% felt comfortable with giving positive recommendation and 30% reported that they would not be comfortable about recommending the destination to others.

 Matzler, Renzi and Rothenberger (2006) found that the relative importance of service dimensions for "overall service satisfaction" differed from their importance for price

satisfaction, suggesting that customers use different cues when evaluating overall service and price. In the tourism sector there is generally reliance on both domestic and international markets making it important to address cultural differences in price-value perceptions. The challenge in pricing for overseas tourist is complex, but where there is reliance on these markets it is important to consider differences in evaluative criteria. The failure of services to meet expectations based on the price paid may lead consumers to attribute their dissatisfaction to others or themselves because consumers believe that they are, at least in part, responsible for their dissatisfaction. This applies more to services than products, which at least can be returned as they often carry warranties (Zeithaml & Bitner 2003). In relation to both overall satisfaction, recommending behaviour and value received, this study shows that they may indeed be different constructs as suggested by the literature. Despite the dissatisfaction with price, 82% reported positive overall satisfaction with the visit and 18% of those who were dissatisfied with price were also dissatisfied with the visit overall. In addition, 70% of respondents who were dissatisfied with price, felt comfortable with giving positive recommendation.

2.2 Project 2: Brambuk Indigenous Cultural Centre

Brambuk is a "Living Aboriginal Cultural Centre" in the western part of Victoria. The study aims were to provide a framework for continuous improvements so that programs would be more effective in meeting the needs and demands of a changing market. The focus of the study was on organisational objectives and the market-based evaluation of the degree to which performance and quality standards are being met. There is no entry fee charged to visitors.

The research objectives were to identify the level of satisfaction experienced by Brambuk visitors and to measure the degree of satisfaction experienced with the services and facilities on offer at the Centre. It is important to make some assessment of visitor satisfaction if managers are to improve services and continue to remain relevant and effective (Fornell 1992). This study attempts to understand the gaps between visitor expectations and experiences and to measure satisfaction levels against operational objectives, programs and activities with a view to developing benchmarks that would

signal the need for managerial action on operational objectives. The products and services offered at a destination can be evaluated in terms of their value-adding capacity by understanding and measuring customer satisfaction (Noe & Uysal 1997, Bramwell 1998, Schofield 2000).

Engagement of visitors

Studies show that in cultural and heritage museums, exhibitions or events, satisfaction levels can be enhanced through a greater level of involvement and engagement of visitors (de Rogas & Camarero 2006). This can, to a large extent, be achieved in the design stages of a centre, as has been done at Brambuk, through information panels, walkways, lighting and audio, which stimulate as well as create interest in the visitor. However, the emotional engagement of the visitor could be enhanced through a greater degree of personalisation through interaction and dialogue with visitors and hence a greater degree of emotional involvement. This could come in the form of cultural interpretations, descriptions and insights that cannot be gleaned from tangible displays. The time spent at the Centre can be an indicator of the Centre's ability to both cognitively and emotionally involve the visitor. A number of visitors commented on the need for interaction with indigenous staff, with comments such as: *"More indigenous staff roaming ready to explain things with their stories and experiences (bit like Australia zoo)."* Emotional involvement can lead to longer visits, with more time spent at the site, the shop and the café.

Pre-visit awareness and marketing

The overall visitor awareness of the Centre (pre-visit) was poor. Of those people visiting the area for the first time, only 41.4% of domestic and 43.6% of overseas visitors were aware of the Centre prior to their visit to the region. This is because tourists normally visit a particular well known tourist destination, which may provide a range of tourist attractions. The attractions then need to be marketed to capture the attention of the tourist while at the destination. All indications are that the general level of public awareness is relatively low for the State's premier indigenous cultural tourist centre.

Pre-visit information sources

Word-of-mouth was by far the most important and the most influential in the decision to visit, with 27.8% of all visitors citing "friends and relatives" as their major source of

information. The second factor on the "influence scale" and second most popular source were the "Roadside Signs", with 24.5% of the visitors identifying this as a source of information and influence on their decision to visit. For Overseas visitors, the most influential sources of information were "Travel Agents" (40%); "Guide Book" (21.5%); "Friends & Relatives" (15.4%) and "Tourist Information Centre" (7.7%). Other sources, including the "Internet" were only marginally utilised.

General satisfactions levels

The overall levels of satisfaction experienced by visitors was very high, as is generally expected in leisure markets and especially in relation to public goods or free services. Some areas of concern for visitors were the ease with which visitors could get information and advice; the signage and labelling; the knowledge and accessibility of staff; and the opening hours.

Visitor responses on core competencies

Brambuk's core competencies are the provision of insights into indigenous culture and the provision of an understanding of indigenous history for the visiting public. From the visit one would expect that visitors would gain a better insight into indigenous culture. Whilst this was generally the case, as indicated by the mean score of 4.23 (5 maximum), however, with a large standard deviation (0.818). It is important to note that 75 respondents were neutral (15%) and 12 were either in disagreement or strong disagreement (2.4%). Given that this item reflects the main purpose of the Centre, it may be important strategically to address why 17.4% of the respondents did not give a positive score. The answer may lie in the analysis of other service or product offerings, displays, activities, information, customer service and the like. This might also include individual characteristics, backgrounds and experiences, which influence their expectations.

Similarly, with the item "I gained a better understanding of indigenous history" the mean score was 3.95 with a standard deviation of 0.851. There were 21 respondents who either disagreed or strong disagreed with this item (4.2%) and 113 (22.8%) were neutral. Therefore, one could conclude that 27% were not willing to give a positive score. From the point of view of visitor satisfaction and as explained in the literature section of this report, the visitor responses are generally skewed towards satisfaction. The purpose of

studies of this type is to identify underlying discontent and address any hidden issues with respect to satisfaction and expectation.

Although our arbitrary benchmarks are met, the high neutral response should trigger managerial concern and evaluation of programs and offerings. There were a large number of comments received about the need for more displays, activities and information, indicating that expectations were relatively high creating a wider expectation-satisfaction gap. However, satisfaction levels with the visit were very positive in aggregate terms. How the programs, activities and displays address the key functional objectives and core competencies should be subjected to regular reviews and modernisation so that they remain effective in meeting changing visitor needs and expectations.

2.3 Project 3: Werribee Mansion

Werribee Mansion is a heritage building, which sits among an extensive garden and depicts the lives of a well-to-do pastoralists from the late nineteenth and early twentieth century period. It is located in a precinct known as Werribee Park. It is in short commuting distance from Melbourne CBD and the regional city of Geelong. It is owned and operated as a tourist destination by Parks Victoria, an agency of State government. The entry fee is at the lower end of the price range and is subsidised by the State government.

The aims of this project were two-fold. Firstly, to identify the main source of visitors, which was detailed in the DBA component RP3, and secondly, to measure visitor satisfaction and dissatisfaction with the offerings, and to understand post visit behaviour such as recommending and revisiting in a low price venue. The conclusions relating to satisfaction are summarised below:

Overall satisfaction
Visitors' overall satisfaction was high (92%). There were no significant differences in overall satisfaction for the various subgroups of visitors (e.g., age, number of children, gender, region, first visitors). There were some visitors who were not fully satisfied with

all aspects of their visit and this may be for a range of reasons such as visitors expecting more information and advice, better signage or more variety.

The overall satisfaction rating for Werribee Park was high, with an average rating of 5.4 (out of 6). The "general environment and atmosphere" (mean score of 5.6), along with "the variety of things to see" (mean score of 5.3) was viewed positively by visitors. While still performing well, "signage" (mean score of 5.1) and "information and advice" (mean score of 4.9) was rated lower, with greater variability in responses. Visitors over the age of 40 indicated very high satisfaction with the environment (61%) while those under the age of 40 did not display the same degree of satisfaction with the atmosphere and environment. Visitors who rated their satisfaction with the environment as very high were predominantly females (71%). First time visitors tended to rate the environment as average.

Engaging visitors

Visitors who were part of a personally guided tour, which was mainly associated with the Tower Tour, and incurred an additional cost of $4 tended to be more satisfied and reported a better experience than those that did not participate. Those that took the self-guided audio tours, involving the audio wand reported a more positive experience than those that did not get either the audio wand or the tour of the tower. Visitors that were able to participate in some way such as wearing of the period costumes tended to report a better experience. Visitors who were able to identify various photo opportunities tended to report a more positive experience. Most that had some interaction and communication with staff at the Mansion reported favourable experiences.

Insights from experiences highlight that visitors are looking for "engaging experiences". It may be possible, given the age of the participants, that these sorts of experiences are desired by younger visitors. Otherwise, experiences were mostly described as "tranquil, serene and peaceful" and most of the visitors enjoyed "the freedom to explore without any pressure". However, the negative side to this is that in a vast and sprawling estate there could be a number of sights or attractions that could be missed. Some visitors reported being tentative at first and unsure about how to proceed with the tour, indicating a need for a structured tour option.

Expectations

Visitors do not appear to come to Werribee Mansion with clear expectations about what they will see. Visitors from Melbourne's West came with clear expectations about what they would see (76%), as did repeat visitors (72%). The notion that "Werribee Mansion is well promoted" did not rate highly and is a clear indication that what people find here well surpasses their expectation and a number of people come without a clear understanding of what is available. Consequently, the statement "There was more to this place than I realised" was rated at as high. Most visitors considered Werribee Mansion as not being well promoted. Visitors were generally not able to form clear expectations about what will happen when they reach the destination, and how much time will be required at the various attractions. Visitors that had formed impressions of what the visit will entail often underestimated the time required.

Information sources

In the case of all visitor segments, the main sources of information for Werribee Mansion are local knowledge (32%), friends & acquaintances (31%), previous visit (30%) and relatives (15%). The Internet (15%) was also a popular way to seek information about Werribee Mansion. Hearing about Werribee Mansion and Werribee Park through friends and acquaintances was an important source to first time visitors and those under 40. Internet access and linkages were found to be confusing in a number of instances as expressed by this comment: "I was a bit confused because so many sites are talking about the same thing". A number of verbal and written suggestions were made about how the website could be improved.

Friends and relatives are an important source of information about Werribee Park, with 46% identifying this as a source. This indicates the power of word-of-mouth in interest generation. Together with the finding that 95% of respondents agreed that "this is a good place to bring friends and relatives" indicates that the "visiting friends and relatives (VFR) is an important segment. This is especially so for people in the West, as Werribee Park is their "local" heritage site.

Value

Only a small number of visitors were willing to pay extra for the tower tour and the audio wand. Some visitors believed that additional costs were not justifiable. With the

additional cost of the options being based on individuals and no group discounts applying, affordability becomes and issues for families. There were 38% of visitors who were aware of the costs prior to their visit and only 13% were deterred by the cost in deciding to visit Werribee Mansion. The 'Park notes' were preferred by visitors over the age of 40, with 88% generally agreeing that the notes added value to the visit, compared with 76% of those under 40. The notes were also found useful by 89% of first time visitors.

2.4 Comparative analysis

Analysis of respondent profiles

This section provides a profile of respondents to the three studies that underpin the analysis. There were three separate studies, data from which were combined for the purposes of this exegesis. The separate studies comprise the three DBA research projects (RP1, RP2 and RP 3). Table 2.1 provides a snapshot of the profile of respondents in these studies.

Table 2. 1: Respondent profiles

	Brambuk	Sovereign Hill	Werribee Mansion
Sample size (usable when combined)	522	426	436
Domestic visitors	84%	78%	91%
Overseas visitors	16%	22%	9%
Gender: Females	65%	53%	66%
Males	35%	47%	34%
Age: Under 30 years	36.8%	34.2%	19.3%
30 – 49 years	39.5%	48. 2%	46.1%
50+ years	23.7%	17.6%	34.6%
First- time visitors	62%	60%	52%
Repeat visitors	38%	40%	48%

The studies were able to obtain good sample sizes in all three studies, which added reliability to the findings. Sovereign Hill is a premier heritage tourist destination in Victoria and generally commands a higher number of international visitors involving

package tours as well as visiting friends and relatives (VFR) segment. On the other hand Werribee Mansion is well promoted and tends to rely on domestic and VFR segments, while Brambuk is situated in a popular tourist region which attracts large numbers of international and domestic tourists.

Werribee Mansion had a higher proportion of repeat visitors and respondents were more likely to be over the age of 30 years, with more than a third being over the age of 50 years. Just over a third of respondents from Brambuk and Sovereign Hill were aged 30 and under, generally falling in the 18-30 age category. These two destinations also had a higher proportion of first time visitors.

The three areas where information was of an organization-specific nature and were required by the management of one site and not the other related to the time spent at the site, pre-visit information sources and the general levels of awareness about the destination.

Time spent visiting the site

A very high proportion of respondents spent one hour or less at Brambuk (50%), and an additional 31% spent between one and two hours. Only 10.1% spent between two and three hours and 8.7% spent more than 4 hours. There was a statistically significant difference in the time spent between domestic and overseas visitors, $p = .008$. The time spent at Brambuk by overseas visitors tended to be generally shorter, compared with domestic visitors, with 67.5% of the overseas visitors spending one hour or less compared to 47.1% of domestic visitors. It should be noted that some respondents from overseas may have been on packaged tours, which generally allow only a fixed amount of time at each location. However, only 37 respondents were part of a packaged tour.

The average time spent at Brambuk was one hour and forty minutes (with a standard deviation of one hour and fifteen minutes). The analysis was controlled for time visits to determine if first visits were indeed longer. This was not the case. For first visits, the average time spent was ninety minutes with sd = 68 minutes, indicating that most people fell into a range between approximately twenty minutes and two hours and forty minutes. On the other hand, the Sovereign Hill study found that sometimes an experience may be overwhelming, in that enjoyment levels can suffer because of various factors. For

example 36% of visitors believed that there was too much to cover in one visit. Venues can be overwhelming when they create physical or emotional stress. Nearly a third of the respondents stated that there was too much walking involved.

Although the length of stay at a particular destination is dependent on a range of circumstances such as personal situation and weather, it is also an indicator of the capacity of the destination to engage a visitor. Some visitors could complete their visit of Werribee Mansion, for example, in thirty minutes while others may spend several hours. This would depend on the interest of the visitor but from the tourism provider's point of view it is important to deliver value that will engage the visitor for a maximum period of time.
In the case of Werribee Mansion there was a significant difference between the time visitors expected to spend and the time actually spent. For example, 75% of those who expected to spend up to two hours actually did spend that time. However, the remaining 25% actually spent more time, some spending three times more than they expected. From those that expected to spend between two and three hours, 25% spent less and 38% spent more time. From those that expected to spend between three and four hours, there were 67% that spent more time.

This mismatch is significant and has implications for the future marketing programs, as it appears that as a general rule people are spending more time there then that initially expected to spend. While this is a positive sign about what the destination has to offer, it is clearly also a sign that there is a failure to explain the range of tourism products and services that are available at this destination. Visitors do not appear to be aware of exactly what is on offer, which can lead to issues of visit planning.

Pre-visit information sources and awareness
The survey questionnaire provided a list of information sources about Brambuk and respondents were asked to select any of the items that applied in their case with respect to the visit. Option was provided to include other items not on the list. For this analysis only first time visitors were included (n=325).

Word-of-mouth was by far the most important and the most influential in the decision to visit Brambuk, with 27.8% of all visitors citing "friends and relatives" as their major

source of information. The second ranked on the "influence scale" and second most popular source were the "Roadside Signs", with 24.5% of the visitors identifying this as a source of information and influence on their decision to visit. In addition, 21.4% of the respondents indicated that the "Tourist Information Centre" and 19.1% indicated that "Brochure in Parks and other locations" were important sources of information. The Information Centre is located with Brambuk; therefore, it appears that in some cases the Information Centre was their main reason for coming and that the visit to Brambuk was a consequence of their Information Centre visit. In a few instances visitors came across the Centre while they were riding or walking along the nearby bike trail.

For Overseas visitors, the most influential sources of information were "travel agents" (40%); "guide book" (21.5%); "friends and relatives" (15.4%) and "Tourist Information Centre" (7.7%). Other sources, including the "Internet" were only marginally utilised.

In the case of Sovereign Hill, for the new or first time visitors, "friends and acquaintances" and "relatives" were by far the most important source of awareness raising information, with 42.2% of them hearing about Sovereign Hill from friends and acquaintances and nearly 30% of them hearing from relatives. These sources were also critical for repeat visitors, indicating the power of positive word-of-mouth. While these were high in the case of both new and repeat visitors, the importance of these sources was statistically significant in that new visitors relied more heavily on these sources of information.

The internet is increasingly becoming an important non-personal source of information for visitors about tourist destinations because of the ease with which important decision making information can be sourced. In total over 17% relied on this source of information and the internet was used almost equally by new and repeat visitors.

The main sources of information for Werribee Park are: local knowledge (32%), friends and acquaintances (31%), previous visit (30%) and relatives (15%). The Internet (15%) was also a popular way to seek information about Werribee Park.

As is the case with many experience-based products and services in leisure markets, word-of-mouth is critical for moving individuals along the awareness path towards interest generation and involvement. There is generally a reliance on more than one

source of information and it may be assumed that the depth of knowledge and awareness increases as exposure sources and frequency increases. Sources such as friends and acquaintances and general local knowledge may be classified as first order sources and the internet would be classified as a second order source, in that search on the internet only comes after some "interest" has been created.

One of the challenges faced by marketing agencies is how to use the internet as a 'first order' source of information and to determine if this is appropriate. In some segments, such as the young, there is scope for designing an integrated internet-based strategy that has the capacity to move internet based activity into a first order source of information for tourism destinations.

2.5 Practical implications

These findings have implications for the way management sets price for various market segments, although this can be difficult to achieve in practical terms. It is important to understand the profile of the market and how shifts may be occurring in the clientele, especially in times when visitor numbers are stable or declining. In the case of Sovereign Hill, where a fifth of the visitors consider inconsistencies in price-performance (Voss et al. 1998), this should be of concern to management. It does not necessarily mean that service quality has declined, but such perceptions can also result from external factors such as price sensitiveness due to economic conditions, lower disposable incomes (because of higher cost of living, or rising interest rates), and exchange rates pressures on international tourists.

Bolton and Lemon (1999) found that there was a strong relationship customers' assessment of payment equity and satisfaction, such that the customers evaluate the exchange as more satisfactory when payments are lower than expected or budgeted. In a saturated market, tourism venues rely on repeat visits, which are fuelled by the "visiting friends and relatives' segment. If visit costs are too high, there is less incentive to undertake such visit and instead select less costly venues. Management could also consider peak and off peak pricing and flexible package pricing as a way of expanding the market share of new visitors and enticing revisits.

Despite the overwhelming satisfaction expressed by visitors there were some issues and areas of improvements highlighted by the respondents in all the three studies. For example, the Brambuk study showed that the offerings were not always able to adequately engage and involve visitors. This has implications for three organisational aspects. Firstly, the products and services must be relevant, portraying a picture of history and culture. Secondly, engagement requires staff to be well informed and trained to give value to visitors by understanding visitor needs and expectations within an indigenous tourism and/or heritage context. Thirdly, it should be clear what the visit entails and what it offers as expectations formed by visitors affects their assessment of value and satisfaction. This could be achieved in a "visit information sheet" which can form a self-tour guide, highlighting the main aspects of the 'journey' through the Centre. Sovereign Hill, for example, uses well directed pathways to guide visitors and eliminate confusion about what to see next.

Being part of a tourism network can provide synergies. For example, Werribee Mansion collaborates with the adjoining wildlife tourist venue. Similarly there is scope for Brambuk brand image to be promoted as an integral part of the Grampians experience, so that the indigenous cultural heritage of the Grampians can be brought to the forefront. Brambuk should be promoted as providing the cultural context for the Grampians visit and as the first point of call of the visit. The study indicates a need to position Brambuk as a cultural museum with properly trained staff that can involve and engage the visitor.

This chapter outlined the summary of the key findings and conclusions from the three individual research projects conducted. Chapter 3 will present a generalised analysis of visitor satisfaction at tourism destinations using the data gathered from the three destinations, with particular reference to satisfaction levels experienced (section 3.2), service and product satisfaction (section 3.3) and price and value satisfaction (section 3.4). Chapter 3 will also provide an analysis and discussion of revisiting and recommending behaviour.

CHAPTER 3

3 ANALYSIS AND DISCUSSION

This chapter will analyse and discuss the key issues that arose from the visitor satisfaction at the three destinations. The framework for these issues were covered in section 1.2 which synthesizes the more detailed literature review, and the common themes which arose out of the three projects relating to visitor satisfaction. Because of the similarities of the projects, where appropriate, the data collected from the surveys was combined to address the propositions indentified in sections 1.2 and 1.3.

This chapter begins with the tests of data reliability and the appropriateness of the analysis that was undertaken and an explanation of the various procedures to be utilized. This is followed by an analysis and discussion of the research propositions.

3.1 Reliability Analysis

3.1.1. Descriptive statistics and data cleaning

Initial survey forms from all three studies were entered manually into SPSS and a series of test, outlined below, were conducted. Prior to this process all original survey forms were given a unique identification number and these were keyed into the data set. Frequency distributions were run for each of the variables and these were examined to ensure that keying errors were not present. Where such errors were discovered, the form identification numbers were used to check the key data against the survey forms and miss-types were corrected. Frequencies were run a second time in case of variables where such corrections were made.

3.1.2. Test of data consistency and reliability

The ten items used to measure the levels of satisfaction were tested to determine the internal consistency of the scales used. Cronbach's Alpha is the most commonly used and is based on the average correlation of items within a test and can be interpreted as a correlation coefficient, the values of which range from zero to one. The generally agreed upon lower limit for Cronbach's Alpha is 0.7, however, it may decrease to 0.6 in

exploratory research   (Hair, Black, Babin & Anderson 2010).   Table 3.1 presents the data reliability statistics.

Table 3. 1: Satisfaction measure data consistency and reliability

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.905	.908	10

The twenty-item scale for products and services measures the satisfaction, experience and expectations in relation to a range of facilities. These items were measured on a 5-point Likert scale from strongly disagree (1) to strongly agree (5). The items were:

Overall, this visit was very enjoyable (quality measure)
The place is well maintained & well organised (quality measure)
The displays and stands were informative (experience measure)
The staff were knowledgeable and friendly (quality measure)
I have learnt a lot from visit (experience measure)
There should be more educational emphasis in displays (satisfaction measure)
The visit represented good value for money (value measure)
I was impressed with the variety of things to see (satisfaction measure)
This was an expensive day out (value measure)
I expected that the visit would take longer than it did (value measure)
I would feel comfortable in recommending this place to others (satisfaction measure)
I gained a better insight into the history of the region (satisfaction measure)
The price of refreshments and other items were reasonable
There are a lot of things to do and see here (satisfaction measure)
I found it a bit too 'touristy' (experience measure)
There is too much to cover in one visit (satisfaction measure)
Conveniences were easily accessible (quality measure)
There were enough places to rest (quality measure)
There was too much walking involved (satisfaction measure)
All things considered, the visit was a good experience (experience measure)

The Cronbach's Alpha value for these twenty items of measurement was .857, which indicates a high level or reliability and consistency. This is shown in Table 3.2.

Table 3. 2: Product and service measure data reliability

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.857	.877	20

3.2 Analysis of satisfaction levels experienced

The levels of satisfaction experienced by the visitors were measured using responses to 10 items, using a 6-point scale from "Very High" to "Very Low". As is supported by the literature our expectation was that high levels of satisfaction would be experienced (Ryan 2003; Ryan & Cessford 2003; Parasuraman et al. 1994; Zeithaml et al. 1993). The items were selected based on the literature and input from the staff at the venues and are presented in Table 3.3 below.

Table 3. 3: Levels of Satisfaction – Mean Scores

Satisfaction Items (Labeled S1 to S10)	Mean Rating*	Standard Deviation
General environment and atmosphere (S1)	4.74	.548
The way in which things are presented and displayed (S2)	5.28	.819
The ease with which you can get information and advise (S3)	5.03	.997
The signage and labeling (S4)	5.09	.953
The knowledge and accessibility of staff (S5)	5.16	.959
Value for money (S6)	4.55	1.300
The range of things to do (S7)	4.86	1.111
The level of hygiene (S8)	4.81	1.129
The learning and education focus (S9)	5.18	.883
What is your overall level of satisfaction with this visit (S10)	5.25	.910

* This mean is based on a scale 6 = Very High to 1 = Very Low

There was no significant difference between males and females with respect to the above satisfaction scales. The level of satisfaction (rating) given by domestic and overseas visitors and by age categories (under 30 years, 30-49 years and 50+ years) did not show any significant differences between the groups of visitors.

The satisfaction rating data was tested for reliability and validity to ensure that the use of factor analysis was appropriate for the data set. It was anticipated that that the ten variables would be correlated and represent a single measure of satisfaction. To determine the appropriateness of factor analysis, the Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett's test of sphericity were examined. A value of .60 or above from the Kaiser-Meyer-Olkin measure of sampling adequacy test indicates that the data are adequate for exploratory factor analysis (EFA) and that a significant Bartlett's test of sphericity is required (Tabachnick & Fidel 2007). Hair et al. (2010) offer the following guidelines: in the .9s data is considered marvelous, in the .8s – meritorious, in the .7s – middling, in the .6s – mediocre, in the .5s – miserable and less than .5 as unacceptable. In order to make sure that each factor identified by EFA has only one dimension and that each attribute loads on only one factor, attributes that had factor loadings of lower than .30 and attributes loading on more than one factor with a loading score of equal to or greater than .30 on each factor were eliminated from the analysis (Chen & Hsu 2001).

For the ten satisfaction measure items the Cronbach's Alpha returned a value of .905, indicating a high level of measure reliability. In the inter-item statistic table 3.4, the corrected item total correlation shows the Pearson's correlation between each item and the sum of the remaining items. For example, item S10 correlates .805 with the sum of items S1 to S9. This shows that item S10 is a good measure of overall satisfaction by itself. The Squared Multiple Correlation column shows the R^2 for each item regressed on the remaining nine items. For example, when item S10 is regressed on item S1 to S9, such that item S10 is the criterion variable in a multiple regression with nine predictors, the resulting R^2 is .692. The last column indicates that Cronbach's Alpha could not be increased by deleting any of the items.

Table 3. 4: Item-total statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
S1	40.77	48.016	.585	.440	.902
S2	40.62	45.971	.582	.430	.900
S3	40.96	43.385	.631	.504	.897
S4	40.83	43.041	.687	.517	.894
S5	40.72	42.542	.686	.532	.894
S6	41.38	40.032	.695	.587	.895
S7	41.05	40.957	.757	.648	.889
S8	41.10	42.803	.629	.452	.898
S9	40.70	44.220	.641	.491	.897
S10	40.89	42.179	.805	.692	.887

Confirmatory factor analysis was run on the satisfaction measures. Principle component analysis was used to identify if the items could be reduced and therefore would represent more than one factor. The correlation matrix indicated that the bivariate correlation (Pearson's r) for each pair of items was above .3 and hence the data are suitable for factor analysis. Consequently, the rotation method most appropriate is Direct Oblimin, which is used when items show correlation. The KMO and Bartlett's Test indicates that the data set comprising the combination of data from the three individual studies was suitable for factor analysis.

Table 3. 5: KMO and Barlett's test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.909
Bartlett's Test of Sphericity	Approx. Chi-Square	1198.766
	df	45
	Sig.	.000

The total variance explained data shows that the amount of variance that can be explained by the factor analysis.

Table 3. 6: Eigenvalues and proportion of variance

Component	Initial Eigenvalues		
	Total	% of Variance	Cumulative %
1	5.511	55.108	55.108
2	.899	8.994	64.102
3	.798	7.984	72.085
4	.642	6.417	78.502
5	.484	4.836	83.338
6	.424	4.244	87.582
7	.392	3.916	91.498
8	.359	3.593	95.091
9	.265	2.647	97.738
10	.226	2.262	100.000

All ten satisfaction items loaded into and represented a single factor, indicating that the items are a good measure of satisfaction.

Table 3. 7: Factor extraction matrix

Component Matrix[a]	
	Component
	1
S10 Overall	.855
S7	.814
S6	.763
S4	.751
S5	.747
S9	.722
S8	.706
S3	.706
S2	.670
S1	.667
Extraction Method: Principal Component Analysis.	
a.1 component extracted.	

The study of responses to the ten satisfaction items were investigated in more detail to highlight the degree of satisfaction and dissatisfaction within the ten items to better understand where corrective performance action may be required to bring about improvements in perceptions.

Table 3.8 shows that there are a number of satisfaction items that have resulted in a significant proportion of visitors scoring low satisfaction (defined as 3 and below on a six-point satisfaction scale. These relate to the tourism offering (item S3 and S7), amenity (item S8) and value (item 6).

The proposition to be evaluated in this study was that price or value for money perceptions impact on overall level of satisfaction. Table 3.8 shows that there are a number of factors that may have contributed to 7.4% of visitors having low satisfaction, such as amenity, product offerings as well as value received. However, it appears that value is a significant contributor of dissatisfaction perceived by the visitor, and 19.3% rated this as low satisfaction. A more detailed analysis of this is provided later in this chapter.

Table 3. 8: Low and high satisfaction

Satisfaction Items	Low satisfaction	High satisfaction
General environment and atmosphere (S1)	1.7%	98.3%
The way in which things are presented and displayed (S2)	4.3%	95.7%
The ease with which you can get information and advise (S3)	9.0%	91.0%
The signage and labeling (S4)	6.9%	93.1%
The knowledge and accessibility of staff (S5)	5.5%	94.5%
Value for money S(6)	19.3%	80.7%
The range of things to do (S7)	10.7%	89.3%
The level of hygiene (S8)	10.7%	89.3%
The learning and education focus (S9)	4.4%	95.6%
What is your overall level of satisfaction with this visit (S10)	7.4%	92.7%

3.3 Analysis of service and product satisfaction

The proposition to be investigated is that mean scores of the ratings given by visitors to product and service components of the tourism offerings may be misleading managers into believing that visitor requirements are being met at a satisfactory operation level.

The analysis of tourism products and services were classified into amenity, atmosphere, product offerings and learning and educational opportunity. Amenity was measure by "the staff were knowledgeable and friendly", "conveniences were easily accessible" and "there were enough places to rest". Atmosphere was measured by " "the place was well maintained and well organised" and "I found the place a bit too touristy". Product offerings were measured by "there are a lot of things to do and see" and "I was impressed with the variety of things to see". The learning and educational opportunity was measured by " the displays and stands were informative", "I learnt a lot from the visit", "I gained a better insight into the history of the region".

Table 3. 9: Product and services mean rating

	Mean*	SD	Skewness		Kurtosis	
	Statistic	Statistic	Statistic	Std. Error	Statistic	Std. Error
AMENITY						
Staff knowledgeable and friendly	4.40	.735	-1.186	.082	1.531	.164
General accessibility	3.63	1.170	-.600	.068	-.354	.136
Enough places to rest	3.78	.967	-.542	.125	-.396	.250
ATMOSPHERE						
Well maintained & well organised	4.50	.651	-1.396	.082	2.945	.163
Too touristy	3.07	1.110	.156	.125	-.698	.249
PRODUCT OFFERINGS						
A lot to do and see here	3.17	1.520	-.248	.068	-1.409	.135
Impressed with variety	4.69	7.431	12.456	.085	155.925	.170
LEARNING OPPORTUNITY						
Displays & stands informative	4.39	.703	-1.164	.082	2.016	.163
Insight into history	4.24	.768	-.959	.083	1.290	.165
Learnt a lot from visit	4.09	.850	-.704	.082	.200	.164

* 1 = strongly disagree to 5 = strongly agree.

Service and product satisfaction contributes to overall satisfaction, experience and enjoyment of the visit. Examination of Table 3.9 indicates that visitors found the learning opportunity offered met the needs of the majority of visitors as the mean scores were between agreement and strong agreement. However, because of the general skewness of the data towards strong agreement it is important to investigate the proportion of visitors where these requirements were not achieved. Examination of the scores between strongly disagree and neutral response to "I learnt a lot" indicates that 23.1% of visits did not achieve this requirement, for "I gained a better insight into the history of the region 14.6% and for "displays and stands were informative" 8.9% appeared not to have met this requirement.

With respect to amenity, 10.6% of visitors appeared not to be satisfied that "staff were knowledgeable and friendly" despite the fact that the majority were pleased with this aspect of the visit. While 16.1% were not satisfied with the product variety on offer, 37.4% did not believe that "there was a lot to do and see here". These statistics confirm that in tourism product performance the mean scores are not a true indication of how visitors perceive various products and services and that a closer look at negative responses is more appropriate for management to identify possible shortcomings in their programs and where attention is required for future improvements.

3.4 Analysis of price and value satisfaction

The proposition studied was that if visitors are happy with price it contributes to their overall experience and conversely if visitors believe that this was "an expensive day out" it contributes to dissatisfaction or can contribute to negative experience.
The initial examination of the data distribution across the three sites studied is presented in Table 3.10.

Table 3. 10: Mean ratings of enjoyment, experience and value

	Mean*	Std. Deviation	Skewness		Kurtosis	
	Statistic	Statistic	Statistic	Std. Error	Statistic	Std. Error
Overall, enjoyable	4.42	.651	-1.060	.082	1.988	.163
Good experience	4.40	.747	-1.669	.068	5.139	.135
Good value for money	3.85	1.053	-.917	.085	.817	.170
Price of items reasonable	3.56	1.037	-.547	.126	-.195	.252
An expensive day out	3.53	1.086	-.319	.124	-.612	.248

* 1 = strongly disagree to 5 = strongly agree.

The examination of the mean scores and standard deviations indicates that there was strong agreement that the visit was enjoyable and a good experience, with variations being in a smaller band. With the price and cost variables the scores were generally between neutral and agree, with a greater spread in scores. For example, with "value for money" the mean score was 3.85 (3 = neutral; 4 = agree), the actual scores ranged from 2.8 to 4.9. This indicates that while some did strongly agree with this statement, there were similar numbers that tended to disagree.

The results were tested against gender to identify any differences in perceptions of value between males and females. No gender differences were found. The data set was tested for reliability and validity for the use of factor analysis. To determine the appropriateness of factor analysis, the Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett's test of sphericity were examined. A value of .60 or above from the Kaiser-Meyer-Olkin measure of sampling adequacy test indicates that the data are adequate for exploratory factor analysis (EFA) and that a significant Bartlett's test of sphericity is required (Tabachnick & Fidel 2007). In order to make sure that each factor identified by EFA has only one dimension and that each attribute loads on only one factor, attributes that had factor loadings of lower than .30 and attributes loading on more than one factor with a loading score of equal to or greater than .30 on each factor were eliminated from the analysis (Chen & Hsu 2001).

Table 3.11:Principal component analysis: Pattern matrix

	FACTORS	
	1	2
Overall, this visit was very enjoyable	.847	
I would feel comfortable in recommending this place to others	.846	
All things considered, this visit was a good experience	.808	
I was impressed with the variety of things to see	.804	
I have learnt a lot from this visit	.791	
The displays and stands were informative	.788	
This visit represented good value for money	.776	
The place was well maintained and well organised	.763	
There are a lot of things to do and see here	.762	
I gained a better insight into the history of the region	.728	
The staff were knowledgeable and friendly	.691	
There was too much walking involved		.721
I found it a bit too 'touristy'		.714
I expected the visit would take longer than it did		.698
This was an expensive day out		.615
There is too much to cover in one visit		.597
There should be more educational emphasis in displays		.582
Extraction Method: Principal Component Analysis. Rotation Method: Oblimin with Kaiser Normalization.		
Rotation converged in 2 iterations.		

The KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) indicated .913 and the Bartlett's test of sphericity: $p=.000$ ($\chi2=3000.18$, $df=136$). Confirmatory factor analysis was used to categorise variables in Table 3.11. Progressive iterations indicated the need to remove three variables, these being "the price of refreshments and other items were reasonable"; "conveniences were easily accessible" and "there were enough places to rest". These were cross loading.

The principal component factor analysis indicated that there were two factors, that were named "positive experience" and "negative experience". The first factor (positive experience) represented 45.3% of the explained variance of the scale, and

the second factor (negative experience) explained 15.8% of the variance. These are shown in Table 3.11, where Factor 1 represents positive experience and Factor 2 represents negative experience

Positive experiences were indicated by the level of enjoyment, the variety on offer, learning opportunity, good amenity and access to knowledgeable and friendly staff. In addition, the visit must be seen as representing good value for money. Where these are achieved there is greater willingness on the part of visitors to recommend the venue to others. On the other hand these must be finely balanced with factors that could negate the total experience. Factors that could result in negative experiences were over pricing relative to the experience, such as offering too little such that the visit could be completed in a shorter time than expected. The other extreme would be to offer too much such that the visit results in exhaustion. The lack of learning opportunity and the venue being too 'touristy' can contribute to negative experiences.

It is interesting to note that the cost of the visit related closely to the nature of experience, in that if the visit is considered 'good value for money' it reinforces the positive experience. However, if the visit is considered "an expansive day out" it could extenuate negative experiences.

Tables 3.12 and 3.13 show that 87.2% of visitors were influenced by the positive enjoyment factors and 85.3% were impacted by the negative enjoyment factors. This tends to confirm that in the majority of instances the factor groups are indicative of positive and negative influences on the level of enjoyment of the visit experience. Males, overseas visitors and those under the age of 30 were less likely to be influenced by the negative enjoyment factors.

Table 3. 12: Proportion of visitors who were impacted by factors that were determined to result in positive enjoyment

Positive Enjoyment	Percent
Not impacted by the positive enjoy factors	12.8
Impacted by positive enjoy factors	87.2
Total	100.0

Table 3. 13: Proportion of visitors who were impacted by factors that were determined to result in negative enjoyment

Negative Enjoyment	Percent
Impacted by negative enjoy factors	85.3
Not impacted by negative enjoy factors	14.7
Total	100.0

It can be concluded from these findings that while cost and value for money considerations impact on the experience and satisfaction derived from the visit, these are only one of a number of factors that contribute to overall experience, enjoyment and satisfaction. Price is not a separate variable that has a unique impact or influence but is merely one of many factors.

The proposition to be evaluated in this study was that price or value for money perceptions impact on overall level of satisfaction. However, it appears that value is a significant contributor of dissatisfaction perceived by the visitor, and 19.3% rated this as low satisfaction as shown in Table 3.9 above. A more detailed analysis of this is provided later in this chapter. Chi-square test of contingencies is mostly commonly used to assess whether variables are related, such that group membership of one variable is influenced by or contingent on group membership of a second variable. A statistically significant chi-square would indicate that the rating response of one group differs from that of the second group. A Pearson chi-square test was used to evaluate whether dissatisfaction overall is related to price-value dissatisfaction. The test was statistically significant $\chi2$ (1, n=417) = 91.93, p = .000, and 2:27 PM association between the two variables was measured using Phi, which showed a value of .47, indicating that dissatisfaction with value had a significant effect on overall satisfaction.

Kendall's tau-b was used to measure the association between satisfaction with price-value and overall satisfaction. Kendall's tau-b can range from -1 (a perfect inverse correlation) to +1 (a perfect correlation), with zero indicating that the two variables are unrelated. It was found that Kendall's tau-b is .645 (p = .000), which indicates that the relationship between price-value and overall satisfaction is positive. This means that visitors with higher levels of dissatisfaction with price-value tend also to have higher

levels of dissatisfaction with overall dissatisfaction, whereas visitors rating satisfaction with price value tend to rate satisfaction overall. This supports the findings by Martin-Consuegra, Molina & Esteban (2007) who suggest that perceived price fairness influences customer satisfaction and loyalty. Their analysis also suggests that customer satisfaction and loyalty are two important antecedents of price acceptance

3.5 Analysis of revisiting and recommending behaviour

The proposition to be evaluated was that price-value dissatisfaction impacts negatively on the willingness of visitors to recommend the tourism venue to others. This section also undertakes an analysis of the differences in recommending behaviour between first time visitors and re-visitors. A number of researchers agree that prior experience influences expectations (Castro, Armario & Ruiz 2007) and new and repeat visitors develop different expectations and interpretations of quality and performance (Zeithaml, Berry & Parasuraman 1993). Yuksel (2000) found that new and repeat visitors display different future intention, in that repeat visitors are more likely to be satisfied. A number of researchers have found that there is a positive relationship between satisfaction and behavioural intentions (Kozak & Rimmington 2000; Tian-Cole & Crompton, 2003). Cultural facilities, such as museums and art galleries have traditionally relied on word-of-mouth communication rather than other means of promotion because it has proved most effective. The best way to generate recommending behaviour is through satisfied customers. This shift to market orientation is a turning point in an industry that has given little prominence to the meeting of need of the customers. Traditionally, museums have focused primarily on the care of their collections (product orientation) and lost market opportunities (Harrison & Shaw 2004).

A chi-square test for goodness of fit was used to assess whether those who were price-value satisfied were more likely to display positive recommending behaviour. The test was statistically significant $\chi 2$ (20, n=807) = 455.7, $p = .000$. In addition, Kendall's tau-b is .462 ($p=.000$) indicating that there is a relationship or correlation between these two variables. Cramer's V, which is a measure of association between the two variables confirms a medium degree of relation, with the test being significant ($p =.000$).

The test for relationship between recommending behaviour and new or repeat visitors indicates a positive correlation. Chi-square test was statistically significant χ^2 (4, n=1307) = 24.97, p = .000. In addition, Kendall's tau-b is .115 (p=.000) indicating that there is a relationship or correlation between these two variables. Cramer's V, which is a measure of association between the two variables confirms a small degree of relation, with the test being significant (p =.000). However, it is interesting to note that 55.8% of new visitors indicated a clear intention to recommend compared with 44.2% of re-visitors. It should be noted that of those who were unlikely to recommend (which comprised 8.3% of all visitors), 76.1% were new visitors and 23.9% were repeat visitors. Overall the recommending intentions were positive since only 8.3% did not indicate a clear intention to recommend.

While here we test for a limited number of service attributes or components of satisfaction, the results are consistent with Hui, Wan and Ho (2006) who found that the likelihood of tourists recommending a destination was positively related to their overall satisfaction. Similarly, Huo and Miller (2007) in their study of a museum found that the services rendered by staff plays a major role in enhancing the level of satisfaction as well as a visitor's willingness to recommend the museum to others. As Veloutsou, Gilbert and Moutinho (2005) point out satisfied loyal customers who are committed to the company not only return but also make a positive recommendation, which attracts new customers.

CHAPTER 4

4.   CONCLUSIONS

4.1 Introduction

This chapter presents the summary and implications of the findings of the study. The first section includes the summary and discussion of the evaluation of the propositions. The second section discusses the managerial implications and the theoretical implications of the findings and the limitations of the study. The final section of this chapter concludes with suggestions for future research.

4.2 Summary of the findings

This study theoretically developed and empirically evaluated a number of propositions relating to tourism product and services satisfaction using data from three heritage tourism venues. These propositions relate to the research questions:

Research question 1: Is there a relationship between price-value perceptions and satisfaction.

The first proposition was that price or value for money perceptions impact on overall level of satisfaction. The study found that while price-value perceptions impact the overall satisfaction levels experienced from the visit, there are a number of other factors, such as the environment and atmosphere, the nature of the amenity, the level of hygiene, and the nature and variety of the product and service offerings, together with the provision of learning opportunity that have an influence on the level of enjoyment and satisfaction that is experienced.

Research question 2: Do negative price-value perceptions contribute to dissatisfaction with the visit and negative experiences.

The second proposition was that if visitors are happy with the price it contributes to their overall experience and conversely if visitors believe that this was "an expensive day out"

it contributes to dissatisfaction or can contribute to negative experience. The study found that visitors with higher levels of dissatisfaction with price-value tend also to have higher levels of dissatisfaction overall, whereas visitors rating highly their satisfaction with price and value also tended to rate satisfaction overall highly.

Research question 3: Do aggregate measures of skewed satisfactions scores distort the managerial perceptions of visitor feedback.

The third proposition was that mean scores of the ratings given by visitors to product and service components of the tourism offerings may be misleading managers into believing that visitor requirements are being met at a satisfactory operation level. The tourism industry in general tends to rely on aggregated satisfaction scores on various measures. The study found that relying entirely on these for decision-making, may result in skewed understanding of issues and hide underlying problems and causes for dissatisfaction. The general skewness of such data towards strong agreement, as was mentioned in section 1.2 and discussed in some detail in ASU1 (Literature Review), raises the need for managers to investigate negative responses despite the fact that the overall numbers in these categories may appear small. It is important to investigate the proportion of visitors where minimum requirements were not achieved. For example, the examination of scores or ratings which are neutral or low are often a better indicator of where problems in services may exist. In this study of heritage tourism venues, ratings between strongly disagree and neutral response to "I learnt a lot" indicated that 23.1% of visits did not achieve this requirement, for "I gained a better insight into the history of the region 14.6% and for "displays and stands were informative" 8.9% appeared not to have met this requirement.

With respect to amenity, 10.6% of visitors appeared not to be satisfied that "staff are knowledgeable and friendly" despite the fact that the majority were pleased with this aspect of the visit. While 16.1% were not satisfied with the product variety on offer, 37.4% did not believe that "there was a lot to do and see here". These statistics confirm that in tourism product performance the mean scores are not a true indication of how visitors perceive various products and services and that a closer look at negative responses is more appropriate for management to identify possible shortcomings in their programs and where attention is required for future improvements.

Research question 4: Do price-value perceptions impact on a visitor's willingness to recommend the venue to others.

The fourth proposition was that price-value dissatisfaction impacts negatively on the willingness of visitors to recommend the tourism venue to others. The study found that those visitors who were price-value satisfied were more likely to display positive recommending behaviour. In addition, the study found the new visitors who were satisfied with their experience were more likely to recommend compared with re-visitors and, as expected, dissatisfied new visitors were generally unlike to make positive recommendation.

4.3 Academic contribution and practical implications

4.3.1 Academic contribution

A number of studies have attempted to contribute to the understanding of customer satisfaction, especially in the marketing and management literature with the common aim of better addressing customer needs and thereby increase the likelihood of repurchase and positive recommendations. Tourist venues and destinations operate in a volatile global market and are subject to competitive pressures in a mature market. Therefore, there is constant pressure on them to meet customer expectations and reinvent and reposition their offerings to entice new and repeat visitors.

While there have been previous studies that make some link between customer satisfaction and price, this study can be distinguished by its concentration on leisure enterprises facing a customer base that may be increasingly price sensitive, due to events such as the global financial crisis.

Satisfied as well as dissatisfied customers can play an integral part in allowing organisations to gain some competitive advantage through strategic future planning and gaining sources of differentiation (Nowacki 2010; Oppermann 2000). The significant contribution of this study and the associated individual studies is to explain the complexity of visitor satisfaction in a heritage tourism setting, drawing the links between satisfaction in an overall visit experience sense and how this may be influenced by the

costs incurred by the visitor and those aspects that caused some degree of displeasure. The studies undertaken were designed to inform management about the operational issues that should be addressed and to provide management with information to instigate service quality enhancement.

Changes in the tourism industry, and competition amongst tourism destinations and operations require that these enterprises be managed from a strategic point of view. Williams and Palmer (1999) argued that the need for more research was critical because of the difficulties in implementing an effective destination marketing, awareness and quality on a continuous basis. This study reveals and confirms that visitors should experience minimal "displeasures", if any, and that tourist venues build a capacity to deliver experiences that meet changing needs and interests. This will ensure an early revisit and positive recommendations.

Loyalty and positive recommending are two of the central focuses in the general marketing discipline. Marketers equally rely on the repeat-visit segment, and recommending, including the "visiting friends and relatives" segment as important market of tourists (Bigne et al. 2001). "Friends" of a destination becomes a fundamental strategic component for service designers, planners and marketers. The ultimate goals of these heritage tourism organisations are identical and involve attracting tourists and tourist expenditures (Blain, Levy, & Ritchie, 2005).

The individual projects and the findings from the combined analysis provide practical implications for managers in the services sector generally and the tourism sector in particular. The tourism sector is subject to seasonal as well as cyclical fluctuations, which demands that the offerings, the service quality and performance and the visit costs do not contribute to any decline in visits. In the heritage tourism venues particularly, the analytical approaches taken in these projects could provide an effective blueprint towards both operational efficiency and visitor satisfaction. Studies in satisfaction are complex and multivariate, such that we need to understand which of the service components and products visitors are happy and unhappy about.

4.3.2 Managerial Implications

For managers charged with service improvements, the study shows that it is more important to have information on which aspects of the operations are causing displeasures and were gaps exist between expectation and performance. Another lesson for tourism operators is the importance of keeping in touch with customer views, sentiments and needs. This requires proactively seeking avenues to minimise or eliminate displeasures by implementing continuous change and improvement programs.

While the studies show that satisfied customers are important because it increases the likelihood of revisits and positive recommending to others, the studies also show that marketing and raising of awareness are important role of managers to undertake and as the market segment composition changes and offerings are renewed, effort is required to inform the marketplace in cost-effective and creative ways.

Performance and customer satisfaction measurement is a concern for managers in a rapidly changing market environment. Conclusions in these studies will assist managers in focusing that need for data on the key variables that are more likely to signal problems and concerns of the market. In developing a service improvement program, managers need effective indicators of problems and the causes of displeasures experienced so that strategies can be developed to address the concerns.

These studies provide guidance on how to influence satisfaction, understand the performance that causes dissatisfaction and harness the critical information required to bring about service quality improvements. Critical feedback about a visitor's expectations and how they perceive a destination can inform strategy formulation towards converting dissatisfied customers into repeat purchasers. With service quality being an interpersonal dynamic, the service provider can change the standards as the service unfolds (Oliver 1993). Therefore, quality improvement should be an ongoing process that involves the whole organisation and especially the visitor-contact staff. Operational procedures and appropriate training is important for the front-line staff so that they can to some extent "control" quality at a point where it matters most.

4.4 Limitations of the study

As with any study, this study also has its limitations. The limitation of this study came from the boundaries that were set for the analysis of heritage tourism venues and its focus on leisure tourists during a period when tourism is facing a decline in tourist numbers, largely due to global economic conditions. This may have some influence on price-value perceptions in general at a time when consumer confidence is declining. The study makes no allowances for these conditions in the external environment. Also the study investigates the perceptions of visitors at these selected heritage venues. If the study is expanded to include tourists at other types of leisure venues, there can be different levels of influences on price-value and satisfaction influences.

This study did not take into account the underlying motivations for the visit to the various heritage venues. These may have a degree of moderating influence on the various research questions that were addressed by this study. Despite the fact that the measurement variables and indicators were selected on the basis of comprehensive literature review, there were limitations placed by venue managers on survey length and the time taken to complete the survey instruments. The use of three different study venues added another degree of complexity in maximising the level of uniformity and wording of survey questions. The use of additional items while increasing the survey length, might improve the inherent reliability and validity of the measures used.

4.5 Future research

The limitation mentioned here should be considered as essential and critical suggestions for future research. Future studies should take into account these limitations to produce more complete research results. No information was provided on the effect of demographics and trip characteristics on the price-value perceptions and recommending intentions and nor was there any account of the non-heritage tourist and leisure venues and pursuits. If this study included this information, the range of destinations evaluated would much wider, adding other layers of complexity to the results. Therefore, future research should examine the moderating effects of demographic and trip characteristic information as valuable instruments for segmenting tourists.

Future research can improve knowledge for both tourism consumers, social and marketing researchers and managers of tourism destinations, especially those who are geared towards quality enhancements and service improvements as the path to gaining strategic competitive advantage in stable and declining tourist markets.

4.6 Conclusion

This study has provided insight into understanding visitor satisfaction in tourism enterprises by evaluating the relationship between price-value perceptions and satisfaction experienced as well as tourist behaviours at heritage tourism destinations. The results provide some insight into what contributes to tourist satisfaction, enjoyment and experience.

The findings are expected to assist strategic and operational managers in their quest for continued quality enhancement and the provision and renewal of tourism products and services. Even though the results are exploratory in nature it is expected that the information provided will give some guidance to managers, tourism operators, markets and researchers alike, in developing well informed data and analysis that are the key to strategic and competitive advantage.

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APPENDIX

DBA - Advanced Study Unit 1

Literature Review & Theoretical Foundations

Visitor Satisfaction: Tourism Enterprises

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THEORETICAL FRAMEWORK AND DECISION MODELS

1. Introduction

This section of the report contains a review of the various theories and models of customer satisfaction arising out of related disciplines of marketing, management and tourism. Such a review provides guidance for both the conduct of the data gathering phases of the research by identifying the major research issues, as well as providing a theoretical framework for the analysis of the data. The purpose of this section is to identify the research issues and decision models that can guide the conduct of the research and to link the findings of the research to the organisational mission and goals, with a view to change implementation. Furthermore, this section is designed to provide the theoretical grounding for the development of decision tools that can be used to operationalise the research outcomes and guide management decisions within a tourism setting.

The schema for presenting the review of the literature is provided in Figure 1. This chapter will commence with a broad overview of the different concepts associated with 'customer satisfaction' and provide a context for developing the various concepts and notions that relate to ensuring that we will have satisfied customers. This will be followed by a brief discussion of why the study of customer satisfaction is central to organisation performance and long-term survival, using some evidence from past research. If managers are to achieve their goals of customer satisfaction, the notions and concepts relating to it needs to be appreciated and they need to evaluate to what extend the organisation is able to meet customer needs and desires. The measurement or estimation of customer satisfaction as a multi-dimensional condition will be briefly discussed to provide a context for the closer analysis of theories in the next section.

The second task of this chapter is to present the dominant and overarching theories, of which there are many, relating to customers satisfaction. Those that will be presented are the most relevant for providing the grounding and the framework for the conduct of this

research and for developing the outcomes for the organisations which are charged with the responsibility for delivering continuous improvements in customer satisfaction.

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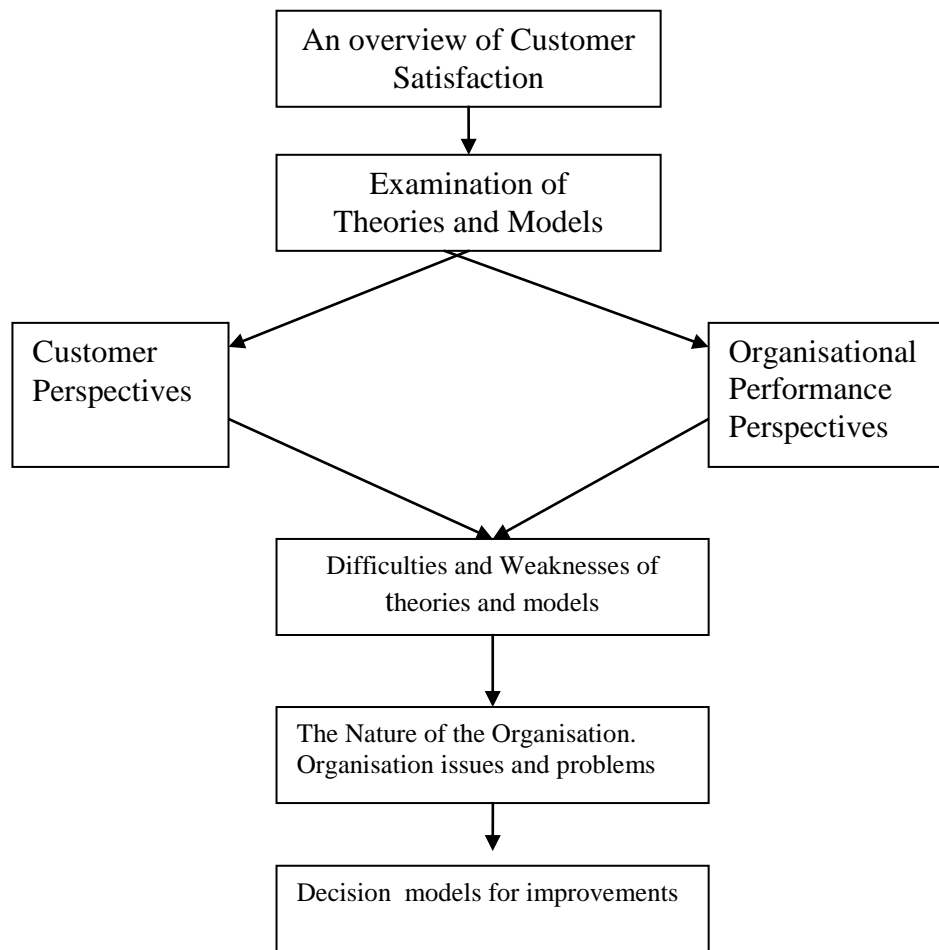
Figure 1: Literature Review Schema

This section will establish that customer satisfaction is a multi-attribute and multi-dimensional phenomenon within a product or service concept. The consumer is central to the product or service concept and views these as 'a bundle of attributes.' With a focus on product or service attributes as a means of delivering enhanced customer satisfaction, the Kano Model (Kano et al. 1984), which views attributes in relation to their role in quality creation, is presented and discussed. From the organisational performance perspective the Kano Model is important because it provides insights not only on the nature of the attributes but also incorporates the dynamics of the attributes. In a similar vain this section investigates Herzberg's two-factor theory, which makes a

distinction between the factors that cause satisfaction and those that cause dissatisfaction, without the factors being merely opposites. This section will also present the SERVQUAL theory and the Expectation-Disconfirmation Model which provide grounding for the conduct of the service quality and services marketing research that is designed for service improvements and quality enhancements.

The third task of this chapter is to present research and concepts that provide some insight into customer satisfaction from the consumer and market perspective. This is not to say that this section excludes anything that may relate to or influence the organisation, as the parties in the exchange process are mutually interconnected. This section will provide insights into the varying needs of different market segments and study the role of customer characteristics and motivation on satisfaction, including the contribution of Script and Role Theory in understanding services. The influence of price on customer perception of quality and its likely influence on the degree to which customers may be satisfied or dissatisfied will be discussed and the state of the research in this area analysed.

The fourth task of this chapter is to present an organisation performance perspective and discuss how the various concepts, theories and models provide an opportunity for organisations to understand consumers, study their customers and develop and deliver services and products that is able to optimise market satisfaction. The focus of this section is on service deliver, quality improvements and how customer perceptions of service attributes should always be the starting point for any improvement strategy. The overarching theories of customer satisfaction provide justification for studying and incorporating customer views into management processes as well as provides guidance about what needs to be studied and understood. This section will discuss the Importance-Performance Analysis, which is a decision-making tool that can be used by management in identifying service attributes or components that should be improved and also in allocating resources that can produce both efficient and effective outcomes. Organisations are generally not only interested in quality service delivery but also in service innovation. Most satisfaction studies are unable to provide insights into future needs and the notion of 'innovation' tends to be ignored in services marketing literature.

The fifth task of this chapter is to identify difficulties that organisations are likely to face in measuring customer and in the context of this research, visitor satisfaction. This section will discuss weaknesses in the existing models and theories and discuss the 'skewness' of satisfaction in public goods, where no price may be involved as well as the influence price may have on satisfaction levels. Since the focus of this research is on providing advise to management on service and quality enhancements a brief discussion will be provided on the use of 'benchmarking' and how this could be used in the tourism sector.

The sixth task of this chapter is to utilise the review of the literature presented in the forgoing sections to develop a "Visitor Value" Management Model that explains and describes the influences and relationships between factors so that the provision of visitor or customer value can be managed. Visitor or customer outcome is a result of the customer's expected value and quality on the one hand and the experienced value and quality on the other hand. Experienced value is influenced by performance of the organisation as well as by other personal and environmental factors. Another role of this section is to present a "Market-based Performance Monitoring Model" which may be used to benchmark service attribute performance against service quality and delivery guidelines set by the organisation with a view to optimising customer or visitor satisfaction

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2.   Customer Satisfaction

2.1   An Overview

The notion of customer satisfaction and dissatisfaction is well established in both the product and services literature and a great deal has been written about it since the 1970s when consumerism was on the rise. Due to the prevailing economic conditions during this period such as rising inflation, decreasing demand and increasing competition put cost pressures on firms, resulting in cost cuts that impacted on customer service. (Hoffman and Bateson 1997).

Satisfying customers is fundamental to the marketing concept and has long been recognised as important firstly in the economic discipline and subsequently in marketing and in business generally. In a competitive marketplace, how one is able to manage and respond to the feedback received from customers provides an important source of competitive advantage (Peters 1994; Kotler 2001). This is equally true is the services sector as it is in the goods sector and in areas such as marketing and tourism, where in the last three decades we have seen a concentration of research dealing with customer satisfaction (Oliver 1980; Pizam and Ellis 1999; Oh and Parks 1997; Cronin, Brady and Hult 2000).

There are a few underlying reasons which gives rise to the study of customer satisfaction. Firstly, customers are central to any business operation and the source of business revenue and profits (Bowen and Chen 2001; Oliver 1999) and meeting the needs and wants of customers is central role of both profit and non-profit organisations (Kotler 2001). Secondly, in a competitive market, customer satisfaction is closely linked to the ability of the organisation to deliver quality (Parasuraman et al. 1985; 1988) so that customers can be retained (Oliver 1999; Pizam and Ellis 1999; Yuksel and Rimmington 1998), and encouraged to remain loyal to the firm through the delivery of superior value (Caruasa 2002; McDougall and Levesque 2000). Customer satisfaction is of strategic importance to an organisation because it is an antecedent to achieving marketing goals of increase market share and profitability, in addition to the generation of positive word-of-mouth and achieving a degree of customer loyalty (Anderson, Fornell and Lehman 1994;

Gronholdt, Martinsen and Kristensen 2000). In the study on the Swedish Customer Satisfaction Index, Anderson et al. (1994, p.63), concluded that "firms that actually achieved high customer satisfaction also enjoyed superior economic returns".

A number of researchers identify independent dimensions of satisfaction. Czepiel et al. (1985) suggest that satisfaction comprises the functional element and the performance delivery element. Lovelock (1991) divides service into core and secondary attributes. Lewis (1987) classifies the attributes of a service encounter into essential and subsidiary. The evaluation of satisfaction is a subjective judgement consisting of both attributes and experiences and is associated with emotions (Noe 1999). Swan and Combs (1976) also support the view that satisfaction is two-dimensional evaluation based on instrumental and expressive attributes. Expressive attributes are more emotional and truly contribute to satisfaction, while instrumental attributes are more cognitive and, if absent, are likely to result in dissatisfaction. This view has much support in the literature (Westbrook 1987; Johnston 1995; Neal, Sirgy and Uysal 1999). The dimensionality of satisfaction has been linked to Herzberg's motivator and hygiene factor theory (Herzberg 1966), which postulates that satisfaction is a function of two types of conditions. Hygiene factors lead to conditions of dissatisfaction (dissatisfiers) and motivators (satisfiers) lead to conditions of satisfaction. Tourist satisfaction and dissatisfaction has been explained using Herzberg theory (Jensen 2004; Crompton 2003). Parasuraman et al. (1985; 1988; 1991b) identified that for customer satisfaction to result, the following generic dimensions must be present in the service delivery:

- Reliability – the performance of the promised service must be accurate and dependable.
- Responsiveness – there must be a willingness to help customers and the service must be prompt.
- Assurance – employees must have the right knowledge and show courtesy, as well as have the ability to convey trust and confidence.
- Empathy – provide individualised attention to customers in a caring manner
- Tangibles – the appearance of the physical facilities, equipment, personnel and communication materials.

Kawashima (1999) and McLean (1994) found from studies relating to museums that customer satisfaction is an important element of operational (achievement of objectives) success and that customers' views should form an integral part of marketing strategy. Improvement in customer satisfaction, not only gives a competitive edge, but also can lead to higher profitability (Anderson et al. 1994; Oh and Parks 1997).

The foregoing discussion indicates that there are a number of perspectives from which the notion of customer satisfaction can be investigated. Customer satisfaction is linked to individual needs and desires on the one hand, and customer expectations, which relate to knowledge of products that are consumed, on the other hand. Previous studies have conceptualised customer satisfaction in terms of an individual's response that results from comparing a product's perceived performance with their expectations (Oliver 1981; Lovelock, Patterson and Walker 2004). If actual performance or outcome from consumption is close to expectation, then the level of satisfaction experienced will positively influenced by those expectations. However, if actual performance is sufficiently different from pre-purchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgement (Sherif and Hovland1961).

2.2   The importance of customer satisfaction

The US Technical Assistance Research Project (TARP 1986) gathered the following statistics that demonstrate the critical importance of customer satisfaction for any firm and also identifies the need to define and measure satisfaction (Albrecht and Zemke 1985, p. 6).

- The average business does not hear from 96 percent of its unhappy customers.
- There are 26 customers who actually have the same problem for each customer that complains.
- The average person with a problem tells 9 or 10 people. Thirteen percent will tell more than 20 others.
- Customers who have their complaints satisfactorily resolved tell an average of 5 people about the treatment they received.

- Complainers are more likely to do business with you again than non-complainers: 54-70 percent if the problem is resolved, and 95 percent id problem is handled quickly.

These figures indicate that complaining is not directed at the firm, but at potential customers and instead of complaining to the firms they choose to defect to competitors. Consequently the firm looses not only that customer, but many potential customers.

Figure 2: Benefits of customer satisfaction and service quality
Source: Lovelock et al. 2004, p. 90

Figure 2 shows that customer satisfaction is a means of achieving several important business operation goals as well as providing competitive advantage for the organisation and fulfilling strategic goal of market share. Operational advantage comes from repeat visits, positive word of mouth and recommending. This contributes towards increasing the customer base and introduces efficiency in marketing programs. A number of empirical research (Anderson et al. 1994) has demonstrated the positive relationship between customer satisfaction and profitability. An organisation's financial performance and returns on shareholder value is driven by quality and satisfaction. Therefore, the identification of the drivers of satisfaction and developing strategies to improve performance on attributes that are valued by customers is crucial for long-term success (Anderson and Mittal 2000).

The degree to which customers are satisfied can result in a diverse range of outcomes for the organisation because of customer actions. These actions and outcomes are summarised in Table 1, which outlines how customers are likely to feel and how they are

likely to react when different levels of satisfaction are experienced. Customer reactions can range from being recommenders and advocates to being complainers to potential customers.

Table 1: Customer satisfaction outcomes

If customers are:	They will feel:	Because you have me their:	And they will be:
Very satisfied	Delighted Enthused	Dreams	Your advocate Loyal
Satisfied	Excited Contented	Expectations and wishes	Retained/fulfilled Interested
Ambivalent	Indifferent	Wants Needs	Attentive
Dissatisfied	Concerned Upset	Minimum requirements Bare essentials	Questioning Looking around
Very dissatisfied	Angry Hostile	Worst fears Nightmares	Gone Your nemesis

Source: Balm, GJ (1996, p. 32)

2.2.1 The need to evaluate customer satisfaction

In a competitive marketplace, how one is able to manage and respond to the feedback received from customers provides an important source of competitive advantage (Peters 1994; Kotler 2001). The shifting consumer needs have to be analysed and understood on a continuous basis as these will impact on the importance placed on various product attributes Mai and Ness (2006). The ability to assess or judge customers' satisfaction levels is the critical first step towards customer retention and long-term competitiveness (Bowen and Clarke 2002). Improvements in customer satisfaction, not only give a competitive edge, but also can lead to higher profitability (Anderson et al. 1994; Oh and Parks 1997). There is a large body of research that supports the links between customer satisfaction and organisational profits (Rust and Zahorik 1993; Bowman and Narayandas, 2004; Keiningham et al. 2005).

Researchers measure satisfaction with the purpose of providing advice to management about what performance needs to improve and to make suggestions for improvements (Danaher and Arweiler 1996). Kawashima (1999) and McLean (1994) found from studies relating to museums that customer satisfaction is an important element of

operational (achievement of objectives) success and that customers' views should form an integral part of marketing strategy.

2.2.2   How to measure customer satisfaction

One of main aims of measuring customer satisfaction is to collect information about customer needs and preferences, about how customers feel about service standards and the degree to which the organisation is able to meet the needs of the market (Vavra 1997, p. 28). This also demonstrates that the organisation is customer oriented and focussed on service improvements. Through a system of measuring customer satisfaction, the organisation places itself in a position to identify attributes that are important to customers and implement changes that optimises customer value (Naumann 1995, p. 23). Naumann also argues that this process can be used to uncover opportunities for service quality innovation and for tapping into new customers. There is a need to strike a careful balance between the needs of the organisation and the needs and issues of the customer, so that there is a degree of efficiency in information gathering (Vavra 1997, pp. 112-114).

Customer satisfaction can be estimated with a single item, which measures the overall satisfaction (Fornell 1992; Spreng and Mackoy 1996; Bigne et al. 2001). Mai and Ness (2006) argue that the degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes. While Yoon and Uysal (2005) stress that satisfaction is multi-dimensional and therefore any attempt to measure it must consider a range of variables.

One frequently used method for determining which attributes are most important in customer satisfaction is gap analysis. In the gap analysis method the relative importance of each product or service attributes is determined and compared with against customer expectations, identifying the gap between the actual and the expected (Parasuraman 1991; Teas 1993). Management improvements efforts would then be directed towards those attributes with the largest gaps. The relationships and interactions between attributes are ignored, as are the contributions of these attributes to overall satisfaction (Hemmasi et al. 1994). Cronin and Taylor (1992) propose an alternative to this and suggest measuring only performance and the contribution of the attribute towards overall

satisfaction. The gap analysis will be explored in more detail for its suitability and applicability in section 2.5.

3 Theories and Models to explain customer satisfaction

The domains of philosophy that are concerned with the concepts, nature and sources of knowledge are referred to as epistemology. Epistemology encompasses the development of concepts (Yu et al. 2008). The basis on which knowledge is acquired is perception but human perception is not always reliable. This has resulted in a number of different views, approaches and conceptualisation of issues, conditions and situations. In the area of customer satisfaction, a domain claimed by a range of disciples, a number of views have emerged in the last five decades. Some of the dominant conceptual views will be discussed and analysed in this section.

3.1 Multi-attribute product concept: Notion of core and secondary attributes

Consumers view a product, service or brand as 'a bundle of attributes' that provides the buyer with functional value as well as secondary values. In the marketing exchange process, need satisfaction depends on the 'bundle of benefits' that is received. 'Attribute' is the benefit sought by the consumer and it is attributes that make up the service and delivers the satisfaction desired by the consumption process. The product or service is a bundle of attributes and in purchase decision process the consumer takes many of these attributes into account. This is also referred to as the evoked set or the choice criterion.

All attributes do not have the same importance and these may vary between customers based on their motivations and desires. For each individual how much importance that is given to each attribute reflects the values and priorities that he or she puts these attributes.

When consumers evaluate a particular product or service this usually based the evaluation of each of the attributes that are of importance to them and it is the

combination of these individual evaluations that makes up the consumer's overall evaluation. There are several ways in which product and service attributes can be viewed. Oliver (1997) views attributes on the basis of their role in the creation of customer satisfaction, Nelson (1970) views their role on the basis of the alternative evaluation process, Levitt (1980) views them on the basis of value creation and Kano et al (1984) views them in relation to their role in quality creation.

In the case of services, experience and credence attributes are more dominant, making them difficult to evaluate prior to purchase. Olson (1977) has suggested that there are intrinsic and extrinsic cues that give a signal about quality, where intrinsic cues relate to the physical composition of the product, while extrinsic cues relate to the product but nevertheless are not part of the physical product as such. For instance, attributes such as price and brand are extrinsic cues (Zeithaml 1988).

Anderson et al (1994) argue that customer satisfaction is complex and multidimensional, with many different independent parts that incorporate purchase and consumption processes and experiences. A tourist product may consist of a series of elements, which can be categorised as core and secondary drivers of customer satisfaction. Kano et al. (1984) categorises the attributes of a product or service based on how well they are able to satisfy customer needs.

3.2   The Kano Model

The Kano Model identifies three main customer satisfaction categories depicted in Figure 3:

(1) Basic Factors - features that must be present or features that the product or service must-have. If these features are not present the minimum requirements will not have been met and will result in dissatisfaction. However, these will not cause satisfaction if they are fulfilled or exceeded. In other words these are regarded by the customer as prerequisites and taken as granted. The presence of the basic factors is essential for customers to enter the market, but they are also taken for granted and may go unnoticed, however their absence will be very dissatisfying (Cheng et al. 1999). A negative performance in the case of these attributes has a greater impact on overall satisfaction than positive performance. (Fuchs and Weiermair 2004). These are features

that must be present and performed well. This is the customers' expectation. However, this is not a sufficient condition for satisfaction.

(2) Excitement Factors – these address the attractive or excitement needs and are satisfiers. If these attributes are delivered by the product or service, they tend to increase customer satisfaction, but do not cause dissatisfaction if they are not delivered. Increasing attribute performance will result in increased satisfaction but decrease in attribute performance will not have a corresponding decrease in customer satisfaction. Excitement factors appear critical in tourism enterprises, as they can be a source of surprise and excitement.

(3) Performance Factors – these are one-dimensional or performance needs where customer satisfaction has a linear relationship with the performance of these factors. High attribute performance will result in high customer satisfaction and will cause dissatisfaction if performance is low. For instance, if something is good value for money the performance needs will result in satisfaction and if it were even better value for money, greater satisfaction will be achieved. These one-dimensional factors are also termed 'more is better', but could also be 'faster is better' or 'easier is better' depending on the nature of the service. The delivery speed is a good example of this type of quality attribute, such that the faster/slower the delivery, the more customers like/dislike (Shahin 2003).

In addition to these three categories, Kano mentions an additional three attributes classified as 'indifferent', 'questionable' and 'reverse' (Berger et al. 1993; Kano et al. 1984).

(4) Indifferent attributes. The customer is not concerned about this product attribute and does not care whether it is present or not.

(5) Questionable attributes. It is unclear whether the customer expects this attribute. This situation may occur if no meaningful conclusions can be drawn from customer response to survey questions or instruments.

(6) Reverse. This is a situation where the customer expected the reverse of this product feature. In the case of some customers, their satisfaction decreases with the existence of this feature and they were seeking the reverse of it.
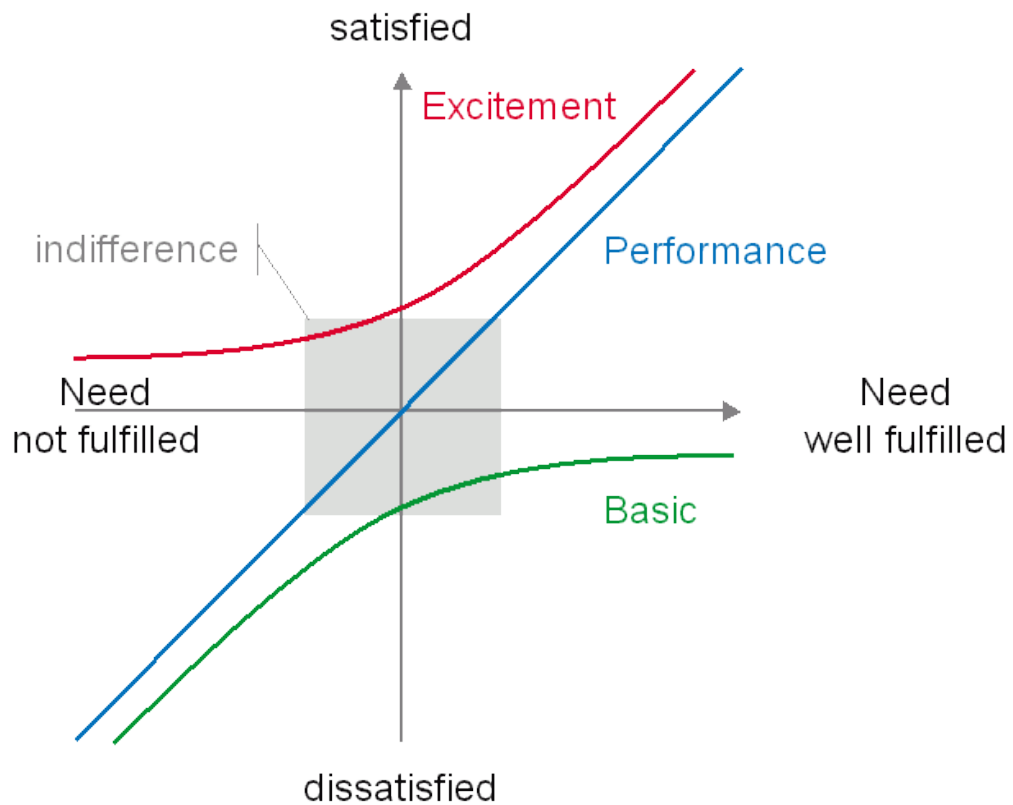
Figure 3: Kano's Customer Satisfaction Model
Source: ReVelle et al. (1998).

In the Kano diagram, on the horizontal axis is the physical sufficiency of a certain quality attribute and the vertical axis displays the satisfaction with a certain quality attribute. The diagram explains the relationship between the degree of sufficiency (degree of achievement) and customer satisfaction with a quality attribute can be classified into four categories of perceived quality. These are 'excitement' (attractive quality), 'performance' (one-dimensional quality), 'basic' (must-be quality) and indifferent quality. Attractive quality attributes can also be described as surprise and delight attributes which provide satisfaction when achieved fully but do not cause dissatisfaction when not fully achieved (Kano et al. 1984). This is the type of quality attribute that is unexpected and delights customers and create satisfaction (Lilja and Wiklund 2006).

The Kano model is an effective tool for understanding the nature and the dynamics of product attributes and for categorising product attributes against customer needs (Bayraktaroglu and Ozgen 2008). Core attributes are the key to customer satisfaction

and need fulfilment. These correspond to Kano's performance factors and have a direct impact on overall satisfaction when 'performance' is high and dissatisfaction if 'performance' is low. Secondary attributes correspond to what Kano (1984) refers to as 'basic' factors and Brandt (1988) as 'minimum requirements'. These do not necessarily result in higher satisfaction levels, but their absence will result in dissatisfaction. Therefore, secondary attributes are necessary but not sufficient for overall satisfaction. They influence overall satisfaction in an indirect manner such that if they cause dissatisfaction they are likely to contribute significantly towards overall satisfaction levels. However, their positive performance does not contribute significantly towards overall satisfaction (Huang and Sarigollu 2008). For example, if customers are dissatisfied with the quality of water at a destination, this is likely to have a strong adverse effect on the overall satisfaction from the visit, while satisfaction with the water quality is unlikely to have much impact.

Kano (2001), among others (Nielsson-Witell and Fundin 2005; Parasuraman 1997; Watson 2003; Woodruff 1997) show that service attributes should be viewed as dynamic, while much of the previous conceptual models relating to service attributes were static in nature. Attributes that are important to the customer changes over time and attributes that were considered important at the time of initial purchase may not be the same as those perceived to be important during the stages of use of the product (Woodruff 1997). Johnson et al (2005) in a study of mobile phones, describe how performance attributes have the highest impact on customer loyalty during the early growth stages of the life cycle and how this effect decreases in influence over time, while the influence of the brand and relationships on loyalty becomes stronger. They suggest that once the organisation is seen by customers to have maintained a certain level of performance over a period, then only does it contribute towards the building of relationships and image. Kano (2001) also postulates that over time an attribute will change from being 'indifferent' to 'attractive' to 'one-dimensional' and finally to 'must-be' quality. When initially introduced to the market an attribute may not be of interest to the customer and they would feel 'indifferent' towards the new attribute. As the product progresses through the various phases of the life cycle, the attribute may gain increasing acceptance and eventually may end up as a 'must-be' item. This view is confirmed by Nielsson-Witell and Fundin (2005).

3.3   Herzberg's Two-Factor Theory

Frederick Herzberg was responsible for developing a two-factor model theory, which distinguishes between the factors that cause dissatisfaction (dissatisfiers) and factors that cause satisfaction (satisfiers).   This theory has had an important influence on marketing theory and consumer research and needs to be addressed in more than a passing manner. The theory was first published in 1959 in a book titled 'The Motivation to Work' (Herzberg, Mausner and Snyderman) and also in 1966 in a book titled 'Work and the Nature of Man' (Herzberg 1966). The reason it is called a two-factor model is that satisfaction and dissatisfaction are not merely opposites.

Their research was based on semi-structured interviews of workers, who were asked to recall events that were experienced at work that were responsible for a marked improvement or a marked reduction in their job satisfaction. Respondents were also asked how their feelings of satisfaction or dissatisfaction impacted on their work performance, personal relationships and well-being. The study found, for instance, that job achievement was related to satisfaction while working conditions were related to dissatisfaction. However, poor conditions led to dissatisfaction, and good conditions did not necessarily result in satisfaction.

In Herzberg's theory, one group of factors is referred to as 'motivators', and were the job content characteristics that resulted in satisfaction because the individual worker's needs for self – actualisation at work were satisfied. The job environment characteristics that resulted in dissatisfaction were referred to as 'hygienes' because they were not task determined but were work supporting. In this theory, motivators include recognition, achievement, advancement, scope for growth, responsibility and the work itself. On the other hand, hygiene include such things as salary, relationships, company policy, personal life, working conditions, status and job security (Herzberg 1966). The marketing literature usually distinguishes these as core product attributes and peripheral attributes.

The absence of dissatisfiers is not enough and satisfiers must be present to motivate purchase or exchange (Herzberg 1966).   In marketing goods or services it would therefore be important to concentrate not only on the satisfiers or motivators of purchase

but also to avoid dissatisfiers such as poorly trained staff. Subsequent research in the marketing field concludes that the two-factor notion should not be universally applied to all consumption situations and that it has applicability only in high purchase involvement Maddox (1981).

The expressive attributes manifest as emotions and therefore, in a tourism or leisure situation especially, contribute to true satisfaction. The instrumental attributes, on the other hand, are more the vehicle via which a tourism experience is felt and are not cognitively oriented, such that their absence may create dissatisfaction. This has some parallels with Herzberg's motivator and hygiene factor theory where motivators are satisfiers resulting in satisfaction and hygiene factors are dissatisfiers resulting in dissatisfaction (Mullins 2001; Crompton 2003; Jensen 2004). Herzberg's theory can be used to explain the two dimensions of satisfaction. In discussing festivals, Crompton (2003) argues that the physical environment and infrastructure, including variables like parking spaces and the cleanliness of restrooms are potential dissatisfiers and must be distinguished from satisfiers, which are key attractions of the festival. These two dimensions are part of the same continuum and can coexist without consequential impact on service quality creating a zone of tolerance between them. With the overlapping of satisfiers and dissatisfiers, service quality violates this zone of tolerance and value perceptions are negatively affected.

3.4   Service quality as antecedent to satisfaction

A number of authors have attempted to extend Herzberg's theory to gain insights into the area of product and service quality (Swan and Combs 1976; Johnston, 1995). However, Vargo et al. (2007) argue that Herzberg's theory was based on qualitative insights and has not been subjected to empirical tests because service attributes are specific to the service. This limits the usefulness of an overarching theory. The quality – satisfaction relationship is non-linear so that there is "diminishing returns from progressive units of improvement" (Maddern et al. 2007, p. 1001). Empirical studies by Pollack (2008) find evidence for the existence of satisfiers and dissatisfiers. Satisfiers initially exhibit no relationship with satisfaction unless an acceptable level of quality is reached, at which point quality becomes positively related to satisfaction. On the other hand, dissatisfiers initially follow a positive relationship path with satisfaction and after quality

enhancements exhibit no improvement in relationship with satisfaction. This study found that the relationship patterns were service attribute as well as service type dependent (Pollack, 2008, p537).

Zeithaml and Bitner (1996, p.117) describe service quality as "the delivery of excellent or superior service relative to customer expectations". At this point it is important to introduce the SERVQUAL model that can be used by managers to understand the expectations and perceptions of their customers within a service setting. This model is very versatile and can be readily adopted in a range of industries or situations.

3.5   The SERVQUAL - gaps model

One of the most widely used tools in services marketing research is the gap model proposed by Parasuraman, Zeithaml and Berry (1988). The strength of this model is in the fact that it deals with both the customer and the organisational perspective with the measurement of service quality as its central focus. There model is based on the premise that service quality is measurable despite the fact that the intangibility character of services presents more difficulties with measurement than is the case with tangible goods. Their model is also regarded as providing practical insights for managers because it deals with the two basic dimensions of service provision, outcomes (customer) and processes (organisation).

The SERVQUAL model consists of twenty-two generic items relating to customer expectations and perceptions, and the items are measured in the model using a seven-point Likert scale from strongly disagree (1) to strongly agree (7). Parasuraman et al (1988) undertook a study of four service industries and identified five quality dimensions to which the 22 items relate. These dimensions are:

- Tangibles (the appearance of the physical elements or facilities and equipment were measure by items 1 to 4).
- Reliability (the ability to dependably and accurately perform service that was promised were measure by items 5 to 9).
- Responsiveness (the willingness to help customers and provide service promptly were measure by items 10 to 13).

- Assurance (the knowledge and courtesy of employees and their ability to convey trust and confidence were measured by items 14 to 17).
- Empathy (easy access, good communication, individualised attention and customer understanding were measure by items 18 to 22).

The customer survey instrument was designed in two parts, with the first part consisting of 22 statements relating to expectations (and item importance) and the second part consisting of 22 statements that were organisation-specific and related to perceptions of service delivery. In addition SERVQUAL instrument asks respondents to evaluate the relative importance that they attach to each of the dimensions of quality and to comment about their service experience and their overall impression of it.

Based on each pair of responses a SERVQUAL score is calculated for each respondent and is computed as follows:

Perception score minus Expectation score equals SERVQUAL score

A SERVQUAL score can also be calculated for each dimension using the sum of the SERVQUAL score for each of the statements that relate to the dimension and dividing by the number of statements in that dimension (mean score).

McColl et al. (1998, pp. 156) summarise the value of SERVQUAL method and results as follows:
- It can identify the areas of service in which the organisation is particularly good or bad.
- It can be used to monitor service quality over time.
- It can be used to compare performance with that of competitors.
- It can be used to measure perceived service quality with a particular service industry generally.
- It can be used for market segmentation if combined with demographic data.

Tan and Pawitra (2001, pp. 420) summarise the benefits of SERVQUAL as follows:
- It is a good tool for eliciting customer views on service encounters, attribute importance, expectations and satisfaction.

- It is able to identify and consider perception of both management and consumers highlighting areas of service excellence and weaknesses.
- It can guide strategy and tactic development and prioritise these to ensure fulfillment of expectations.
- It can provide benchmarking analysis for organizations in the same industry.
- If applied periodically it can trace trends expectations and perceptions.

Under SERVQUAL the customer's evaluation of quality is seen as a function of the difference (or gap) between expected service and perceived service. This gap model enables managers to analyse the underlying sources of quality problems and helps in understanding how service quality can be improved (Parasuraman et al. 1985; Zeithaml et al. 1988). The model is illustrated in Figure 4.
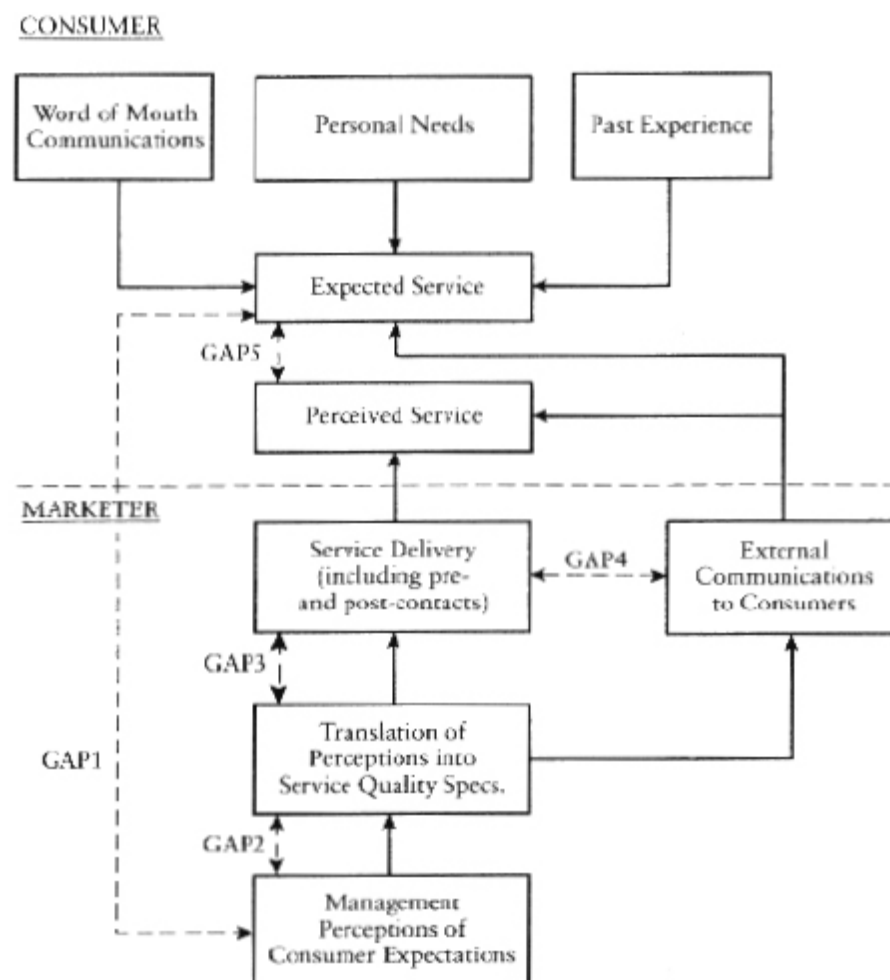

Figure 4: Conceptual model of service quality – The gap analysis model.
Source: Zeithaml, Berry and Parasuraman (1988).

There are two distinct parts to the model. The upper part gives the consumer perspective and the lower part gives the organizational or service provider perspective. Word-of-mouth communication, personal needs and the customer's past experiences influence the expected service. It should be noted that the organization does have a role to play here because these variables would be influenced by the marketing communication activities of the organization. In the model the perceived service is the experienced service that is the result of a series of organizational decisions and activities. These decisions are influenced by management perceptions of customer expectations, which in turn are inputs to service quality design and specifications culminating in the delivered service.

Figure 4 identifies five quality gaps between the various elements. The usefulness of the gaps model is that it identifies the steps managers should follow when analysing and planning for service quality as well as in the identification of quality problems. The five steps in this process are briefly discussed below and an explanation is provided as to why the gaps may occur:

Gap 1: The management perception gap. This is the gap between customer expectation and management perception. The practical implication of this gap is simply that management perceives quality expectations of the customer inaccurately. This could occur because of weaknesses in the information that is being relied on, such as flaws in research on customer needs, wants, preferences and perceptions or on misinterpretations of such information. Another cause may be that appropriate information systems do not exist so that there are weaknesses in information gathering or information flows within the organisation's decision system. "A firm that does no marketing research at all is unlikely to understand its customers' (Zeithaml and Bitner 1996, pp. 137). Alternatively, Gap1 may simply be caused by poor management practices and not being customer focused. There may be a lack of marketing research or inadequate use of or action on research findings and a general lack of interaction between customers and management (Haksever et al. 2000). A number of researchers have found that contact employees are a good source of information on customer attitudes (Bitner, Booms and Mohe 1994; Schneider and Bowen 1995; 1999).

Gap 2: The quality specification gap. This is a 'planning gap' and relates closely to Gap 1. A discrepancy may occur between service quality specification and management

perception of quality expectations. If we assume that management has perfect information and systems so that Gap 1 does not exist, quality specification can still fail. For instance, management may lack the commitment to optimise quality, the right culture may not exist in the organisation or lower priority may be given to quality issues. Alternatively, the problem may be in the planning process itself such that effective goal setting and coordination of different levels and roles in the organization cannot be achieved.

Gap 3: The service delivery gap. This is an 'operational gap' where quality specifications are not being met by performance in the service production and delivery process. Operational problems may be caused by specifications that are too complicated and not supported by service employees or by the corporate culture. Management systems that can facilitate performance may not exist. According to role and script theory, there may be incongruence in customer and employee role understanding. In some cases, and especially in first time encounters, customers themselves may contribute to Gap 3 because there is a lack of understanding of their roles (Zeithaml and Bitner 1996). Weaknesses in internal marketing, employee supervision and staff training may result in role ambiguity and may not support quality performance.

Gap 4: The service delivery and external communication gap. This is a 'marketing communication gap' that occurs when the messages and promises made by marketing communication activities are not consistent with the service delivered. This gap occurs when the marketing communication agenda and the service operations agenda are not integrated and coordinated. The cause of this gap is not always marketing communication, which may indeed follow service specifications, but the problem may rest with Gap 4 where operational performance failure occurs. There needs to close coordination between external marketing communication and service operations and delivery. The communication should always conform to what is likely to occur in practice and this should be continuously monitored by management supervision. According to Zeithaml and Bitner (1996, pp. 451) "customer expectations are shaped by both controllable and company-controlled factors". Customer needs, customer experience with other providers and to a large extent word-of-mouth communication are rarely controllable by organizations yet they are key factors that influence expectations. Factors such as promotion, price and tangibles associated with the service influence

expectations and are controllable by the organization. Zeithaml and Bitner (1996), argue that one way of minimizing the size of this gap is to carefully regulate communications within and outside the organization. "Marketing must accurately reflect what happens in actual service encounters; operations must deliver what is promised in communications" (pp. 453).

Gap 5: The perceived service quality gap. This gap occurs when the experienced service is not consistent with the expected service and is caused by failures in Gaps 1 through 4.

The Gap Analysis Model can be used to guide management in identifying the reasons for the quality problems and in discovering appropriate ways to close the gap (Gronroos 1990). Gaps analysis is a way to identify inconsistencies between provider and client perceptions of service performance and to formulate strategies and tactics that will increase the likelihood of satisfaction and a positive quality evaluation (Brown and Swartz, 1989). There have been a number of criticisms of SERVQUAL and the conceptual framework provided by the Gap Model. Cronin and Taylor (1992) were concerned about the operationalising of the perceived quality concept, arguing that when customers are asked to make estimation of customer perception their mental process may already included the perception minus expectation notion.

In the context of service improvements by organizations, the SERVQUAL model bestows all quality judgments to the customer. Zeithaml et al. (1996, p.16) claims that 'only customers judge quality; all other judgments are essentially irrelevant.' Management may see this as problematic because no notion of objective service quality exists beyond the customer's perception. This also tends to make quality judgments subjective, as a wide range of factors, both cognitive and environmental, can influence perceptions. It may also be deduced from this that there is no such thing as service quality in 'reality' outside of the customer. It may be difficult for managers to reconcile the view that service quality is not anchored in objective reality. This has given rise to alternative approaches focusing more on performance.

SERVQUAL was originally designed as a generic measure that could be applied to any service. However, Carman (1990) and Finn and Lamb (1991) argues that SERVQUAL should not be used as an "off the shelf" measure of perceived service quality and needs to

be customised to the service organisation in question. Adding new items to the SERVQUAL list, or changing the wording of items that are more representative or applicable to the area being studied could achieve this. Managers should carefully consider which issues are important to service quality in their specific environments and modify the scales as needed (Brown et al. 1999, pp. 461). Cronin and Taylor (1992; 1994) argue that 'performance' instead of 'performance-expectation' determines service quality and developed an alternative tool, SERVPERF, in which 'performance' was the central parameter. This view is supported by Bolton and Drew (1991), Babakus and Boller (1992) and Churchill and Surprenant (1982). Lee et al. (2000) also found support for the hypothesis that performance-based measures of service quality capture more of the variation in service quality than do difference measures. In practice, organisations use a wide range of methods to measure customer satisfaction, including surveys, monitoring complaints, focus groups and even 'mystery shoppers', among others.

Parasuraman et al (1994) argue that service quality measurements that incorporate customer expectations provide richer information than those focused on perceptions only. Prior to SERVQUAL, Parasuraman et al (1985) had proposed that ten dimensions, which include reliability, responsiveness, competence, access, courtesy, communication, credibility, security, understanding/knowing the customer and tangibles, determine service quality. Their proposition was that the difference between perceived performance and expected performance across these ten dimensions determine the overall perceived service quality. This was based on Oliver's (1980) disconfirmation model, which proposed that satisfaction is a function of the disconfirmation of performance from expectation.

3.6   The disconfirmation - confirmation of expectations paradigm

It can be seen from the foregoing discussion that the disconfirmation of expectation is a dominant model in satisfaction research. Because Oliver's (1980) disconfirmation of expectation model has been so central to the satisfaction theory, it is briefly explained here. In simple terms the model postulates that satisfaction is related to the variation between a customer's pre-purchase expectations and perceptions of service performance. The discussion of various models, such as the Kano model (Kano et al. 1984; Herzberg et al. 1959), has shown that in determining customer satisfaction one cannot assume that there is no difference between the causes of satisfaction and dissatisfaction. There are

some determinants that are primarily the source of satisfaction while others tend to be primarily the sources of dissatisfaction (Bloemer et al. 2002; Cadotte and Turgeon 1988; Maddox 1981).

The underlying premise of the disconfirmation of expectation model is that consumers, often subconsciously, compare actual and perceived performance with their expectation. Unlike service quality, which is the result of perceived service gaps, customer satisfactions results from comparing predicted service with perceived service. The customer's expectation exists at two levels: a desired level and an adequate level (Parasuraman and Berry 1990, pp.58). The desired service is what the customer hopes to receive while adequate service is what the customer finds acceptable. The two levels are separated by a zone of tolerance, which the range of service performances that would be considered satisfactory.

The outcomes of the disconfirmation of expectation model are demonstrated in Figure 2.4. When service experience is just as was expected the customer is satisfied. If the service experience is much better than the pre-purchase expectation, the customer is highly satisfied and therefore delighted. When the service experience does not live up to expectations the customer will be dissatisfied (Lovelock et al. 2004, pp. 91).

Experience
Word-of-mouth
Marketing communication
Awareness of competitors

**Perceived
performance
(P)**

**Expectation
(E)**

Comparison
Process

Negative
Disconfirmation
P < E

Confirmation
P = E

Positive
Disconfirmation
P > E

Dissatisfaction

Mere
satisfaction

Delight
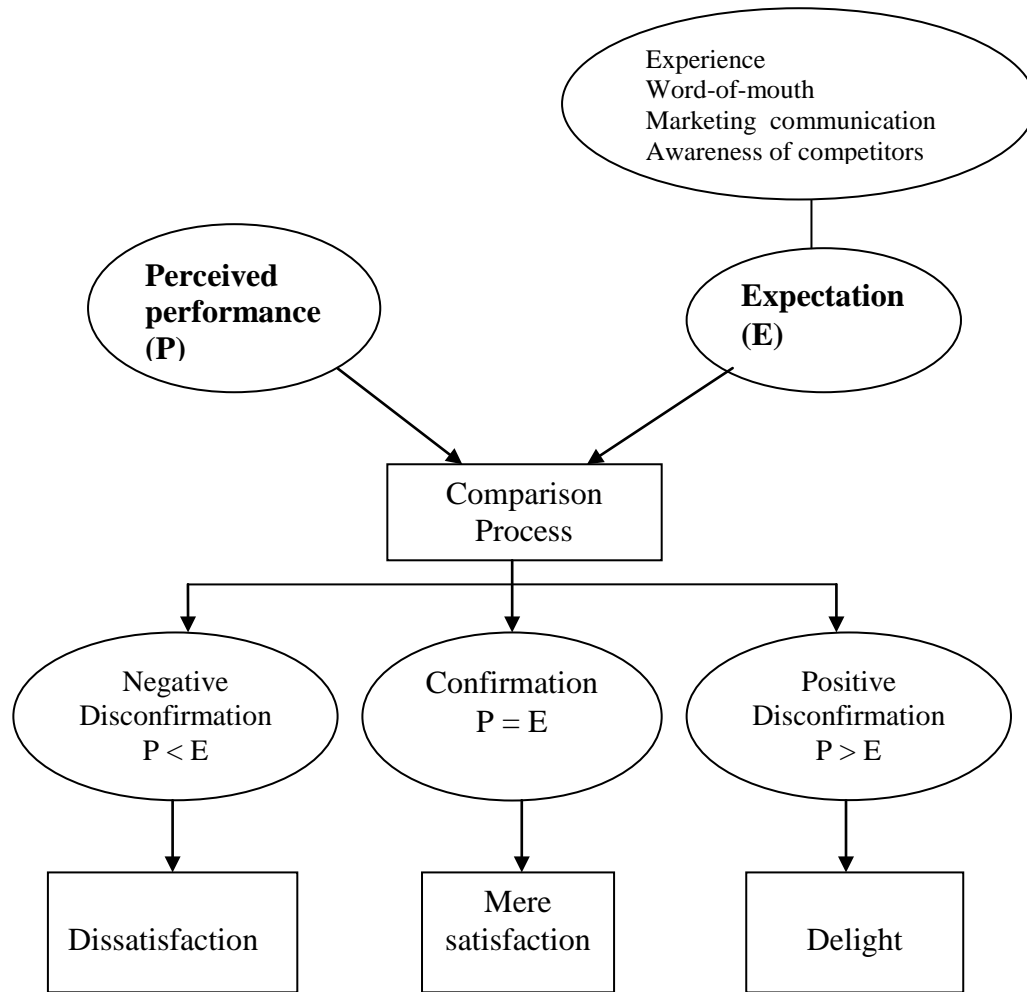
Figure 5: The disconfirmation of expectation model
Source: Reproduced from Lovelock, Patterson and Walker (2004, p. 91).

The disconfirmations model suggests that service quality perceptions are a function of the gap between expectations and performance. If perceived performance exceeds expectations there is a positive disconfirmation (perceived performance is seen as greater than what was expected). If perceived performance is lower than expectations, there is a negative disconfirmation. The net effect of the comparison of expectation relative to performance can be summarised as follows:

- if expectations (E) exceed performance (P), where E<P, then the customer is delighted,
- if expectations are not exceeded by performance, where E>P, then the customer is dissatisfied, and

- if expectations are met by performance, where E=P, then the customer will access the service to be satisfactory and as predicted (Gronroos 2007).

When expectation matches outcome, confirmation occurs and 'mere' satisfaction is felt. Disconfirmation occurs when there are differences between expectations and outcomes. This can occur in two circumstances. First, when the service outcomes (or performance) is less than what was expected. This is a negative disconfirmation. Second, when the service outcome is greater than that expected, positive disconfirmation occurs and the customer is delighted (Pizam and Ellis 1999).

One important consideration is that expectations are unlikely to be uniform across all consumers and all consumer segments. During the evaluation process some consumers attach more importance to disconfirmation than other consumers (Kopalle and Lehmann, 2001). The managerial implication of disconfirmation is that organisations should 'under-promise and over-deliver'. In such a situation the strategy would be to lower expectations by under-promising and creating a greater negative disconfirmation gap by over delivering.

The alternative view to this is that service quality perceptions result from a process of confirmation (Hamer 2006). The confirmation concept suggests that organisations should be raising expectations and raising the customer's perceptions of quality, so that under-promising will result in lower quality perceptions. On the other hand, higher expectations of service performance will be associated with high perceptions of service quality, so that mangers should be raising expectations as a way of eliminating the gap. So rather than making expectations and performance go in opposite directions to achieve a greater gap, the confirmation concept argues that consumers are looking for more consistency between expectations and performance.

The perceived service quality is maximised when both expectations and perceived performance are high (Dawar and Pillutla, 2000; Hamer 2006; Spreng et al. 1996). The managerial implication for this is that management communications to consumers would encourage them to expect the highest level of service that the organisation can deliver consistently. To have satisfied customers it is always better to meet high expectations than it is to meet low expectations. Omachonu et al. (2008, p. 444) suggest that strategic investment of resources to affect customer satisfaction should be targeted at meeting and

exceeding customers' expectations. At the least, what is promised must be delivered. According to Vavra (1997, p. 4) satisfaction is an end-state resulting from the experience of consumption, but the consumers make assessment of satisfaction during the service delivery process. Vavra identifies three main inputs to this to be the cognitive state of reward, the emotional response to the experience and the comparison of the rewards and the costs.

It should be noted that the zones of tolerance is likely to vary from customer to customer and therefore it is important to look at other issues that may influence expectations, such as customer characteristics and role of price, for instance. Also in a service setting, the zones of tolerance for a given customer may vary from transaction to transaction. The zones-of-tolerance concept will be explored further in section 2.3.4. Expectations can be influenced by a range of factors and conditions such as customer and employee roles in service productions and consumption, word-of-mouth, marketing messages and past experiences. Some of these are explored in the following section, providing various customer perspectives.

4 Customer Perspectives

4.1 Role of visitor characteristics in service evaluation

In making judgements on customer satisfaction levels achieved it is important to take account of the differences among customers rather than simply considering the service concept. Customer characteristics such as age, income, gender, and travel experience impact on the composition of overall satisfaction. While both core and peripheral attributes are positively related to overall satisfaction, service interaction plays a more influential role in overall satisfaction (Anderson et al. 2005, p.31). Their study found that improvements in service interactions produce a greater marginal increase in overall satisfaction than improved operational performance or improvements in the physical elements of the service.

Merely tracking the level of satisfaction may not deliver a true picture. Research focus should be on the drivers of overall satisfaction and their variance across different customer groupings or segment (Anderson, Pearo and Widener 2005)
What matters to customers differs significantly based on their characteristics, which in turn has an influence on their evaluation of satisfaction (Cronin and Taylor 1994; Parasuraman et al. 1988). There is a body of research that has shown that individual differences in customer characteristics, such as age, gender, income and past experience are significant determinants of satisfaction (Mittal and Kamakura 2001; McDougall and Levesque,2000; Soderlund 2002).

It is common for customer or visitor satisfactions surveys to gather at least some demographic characteristics such as gender, age and country of origin, to provide some contextualisation of the findings. In larger studies, characteristics such as income, education and family structures may also be investigated, but for operational efficiency reasons only a few of these are included in surveys run by organisations. Previous research shows that gender can be a key factor in satisfaction. A number of previous research (Anderson et al. 2005; Bendall-Lyons and Powers 2002; Mittal and Kamakura 2001) find that women report greater satisfaction than men. Some differences sighted are that women understand their needs better than men (Bryant and Cha 1996), women are

less likely to tell the truth about negative experiences than men (Mittal and Kamakura 2001), women place greater value on personal interactions compared to men (Lacohucci and Ostrom 1993).

Age and prior experience have also been shown to impact on satisfaction levels. Mittal and Kamakura (2001) contend that older people may be less likely to accept a given level of satisfaction but in general tend to be more satisfied than younger people. People with a broader range of past experiences (not necessarily limited to a given situation) would have a wider and well developed point of reference for service evaluation resulting in a higher ideal level of service (Zeithaml and Bitner 2000).

4.2   Role of affective factors in satisfaction

From a theoretical standpoint, the concept of satisfaction continues to be debated (de Rojas and Camarero 2006a). The disconfirmation paradigm largely considers satisfaction to be a cognitive state (Oliver 1980) but recently there is a clear recognition that in addition to the cognitive influences there is a role for the affective dimensions in understanding satisfaction (Wirtz and Bateson 1999; Philip and Baumgartner 2002). In a tourism setting and generally in the field of visitor experiences there is a need to consider the role of emotions because more fundamentally the arousal of emotions and pleasure is one of the goals of most tourism enterprises. Pleasure and arousal are important outcome sought from tourism experiences (Oliver and Swan 1989; Fornell 1992; Bigne et al. 2005). de Rojas and Camarero (2006b, P. 54) found in their study that disconfirmation positively influences the visitor's pleasure dimension of emotions and when visitor experience pleasure this influences the visitor's level of satisfaction. While the concept of customer satisfaction continues to be debated, on the basis of previous studies consumer satisfaction can be defined as a cognitive-affective state which results from cognitive evaluations as well as from emotions that these evaluations evoke (Bigne et al. 2005, p. 835).

Emotions are temporary states caused by pleasant or unpleasant dispositions (Oliver 1997). Positive and negative emotions associated with service encounter play an important role in defining satisfaction (Martin et al. 2008; Oliver 1993). The mood of the customer may play an important role in the moment of true satisfaction (Knowles, Grove and Pickett 1993). A good mood may activate positive response to any minor incident

(Zeithaml and Bitner 2000). Tourists' emotional responses might be manipulated positively with a guided tour (Bowen 2001). Positive arousal influences visitor pleasure positively. Pleasure is strongly linked to consumer satisfaction and loyalty in experiencing tourism attractions (Chebat and Michon 2003). Bigne et al (2005, p. 841) found that positive disconfirmation (delight) influences visitor pleasure as well as visitor arousal and that the cognitive effect of disconfirmation on pleasure appears to be fully mediated by visitor's arousal.

The disconfirmation models, which focus on the nature of expectations, do not indicate the importance of a particular dimension of quality (Zeithaml et al. 1993). The fact that a customer's expectation may have been disconfirmed in respect of a particular dimension of service delivery does not mean that dissatisfaction will result, especially if the dimension is perceived as unimportant (Bacon 2003). Therefore, by neglecting the emotional components of satisfaction the reliable predictions of customer responses may be compromised (Yu and Dean 2001; Barsky and Nash 2002). Many tourism venues, such as museums, provide customers with avenues for fulfilling goal-directed positive emotional experiences that customers are consciously seeking when on holiday. As was discussed in section 2.4.1, different customers may react with different emotions.

Chang (2008) found that the feeling of satisfaction is based on trade-offs between service attributes. However, each tourist has a different value judgment towards individual attributes and may give them different mental weightings. Their overall satisfaction level may be influenced by a single factor that is ranked more highly than others. For instance, Taiwanese visitors when involved with negative emotional experiences tend not to complain to service providers. The fact that they do not respond to dissatisfaction means that extra care is required in service interactions to ensure that any such emotion can be responded to through a better understanding of their needs (Chang 2008).

There is a general lack of research in this affective area of satisfaction compared to the cognitive dimensions. Collecting useful data on affective states would be problematic for organisations that generally rely on short instruments that can be completed quickly. Affective investigations are likely to be more intrusive for customers and costly for organisations because qualitative techniques, such as in-depth interview, may be more appropriate to understand emotions in various contexts (Martin et al. 2008).

4.3   The zones of tolerance

The key questions for organisations committed to service quality improvements are twofold. The first is, how much quality is enough and the second is, when are service improvements most effective. These questions can be understood by the zone-of-tolerance concept, which has also been referred to as the zone of indifference (Yap and Sweeney 2007). One of the characteristics of service is its heterogeneity or variability in performance, so that consumers as an integral part of their decision-making processes normally accept some variation in service.

According to the disconfirmation of expectation model (section 2.2.6) the way in which consumers evaluate service is by comparing what they perceive they have received with their expectations. Satisfaction results when the perceived service is equal to or greater than the expected service. According to Zeithaml et al. (1993) and Berry and Parasuraman (1991, pp 57-63) customer expectations exist at two levels, a desired level and an adequate level, which for the two standards by which customers make assessments of service performance. The desired level is the service the customers hope to receive and is a blend of what they believe 'can be' and 'should be' provided. The adequate service level is that that which the customer finds acceptable, but is the minimum that they will accept. In between these levels is the zone of tolerance, and the service level in this zone is considered satisfactory.

Some understanding of what influences the desired and adequate service levels will assist organisations in formulating effective and efficient service enhancement strategies. The zone framework enables managers to introduce new service concepts and assess how sensitive customers are to service variations (Yap and Sweeney 2007). Yap and Sweeney (2007, p.148) suggest that it is vital for managers to exceed adequate expectations because "increased expenditure on quality continues to enhance perceptions and behaviours at the same rate beyond the ZOT." Customers appreciate increase in service quality both within and beyond the zone of tolerance.

In section 2.4.1 we found that customers are not all the same when it comes to their perceptions and expectations. The service they desire will be determined by their individual characteristics, and ultimately set by their personal needs and wants. The

person's personal circumstances and outlook, as well as needs and desires will be shaped by social, psychological and environmental factors (Bateson and Hoffman 1999). The zone of tolerance therefore varies between customers, but it also can vary from transaction to transaction for the same customer. Both desired and adequate levels can fluctuate, however, the desired service tends to change more slowly and in smaller increments over time compared to the adequate service level (Berry and Parasuraman 1991). Variations in adequate service levels would be most noticeable to customers and the subject of service for organisations.

In the case of tourism destinations and tourism services expectations may not be well formulated because of relatively few occasions revisit and even first visits occur. People are not constantly on holidays and when these opportunities arise they are unlikely to return to the same location in a short time span (Kozak 2001a, p. 307). Although many tourists today appear to be well informed because of electronic information sources all visitor destinations are unlikely to be equally well researched. Therefore, the different attributes of a destination will not be matched by precise and confident expectations (Cadotte, Woodruff and Jenkins 1987). In addition, cultural differences are likely to influences expectations and perceptions as they do with attitudes and behaviours (Weiermair and Fuchs 2000). Such differences are likely to impact on and cause significant variation in the zones of tolerance.

Changes in expectations that can induce variation in the tolerance zones can arise due to a number of factors, including some that are controllable by organisations, such as implicit and explicit service promises communicated and others that are somewhat beyond organisational control, such as personal needs and past experiences. Word-of-mouth (WOM) communication is an important influence and may appear to be uncontrollable but can be 'managed' by the provision of superior quality. A high level of satisfaction with the service encounter generates positive WOM communication, but the converse is also true (Susskind 2002). Attracting new customers through WOM recommendations generates new income streams and increased revenue opportunities (Struebing 1996). Managers believe that while promotional efforts can increase overall revenue, WOM recommendations from friends and family does have a measurable impact on sales (Rust et al. 2004). Satisfied customers generate free WOM advertising and saves subsequent marketing costs (Brown et al. 2005; Luo and Homburg 2007).

Marketing communication, WOM and customer's past experiences influence their perceptions of service as well as their expectations (Zeithaml et al. 1993). How the service experience is perceived also depends on the service process itself and may be influenced by the role of contact employees, the physical environment and service attributes. In settings such as a museum, customers are to some extent aware that they are an important part of the service process and that the quality of service they receive depends on their attitude to service encounters (Bateson and Hoffman 1999). In this instance, the role of both customers and employees needs to be understood by the parties if the adequate service levels are to be achieved as a minimum. A role has been described by Soloman et al. (1985, p.99) as:

> "a set of behaviour patterns learned through experience and communication, to be performed by an individual in a certain social interaction in order to attain a maximum effectiveness in goal accomplishment."

Insights into this can be provided by role and script theory, which is discussed below.

4.4   Consumer and employee performance in services – Script Theory

The key distinction between goods and services is based on consumer performance or the quality of the involvement of the consumer in the production process. Consumer participation in service production requires that the consumer will perform specific tasks (Bateson 2002). For example, in a visit to the museum the consumer is required to seek out the things that may be of interest to them. However, consumer performance in such a setting can be guided, if not managed by the service organisation because they are an integral part of the firm's productive capacity or service operations. In the service encounter process customers and service employees play roles from a script. To maximise satisfaction employees must perform their roles to the meet the expectations of the customers. One way of bringing about a degree of uniformity in service quality is to develop a well-scripted service procedure.

"A script is a learned sequence of behaviour patterns that consumers and service providers follow during service transactions…" (Hoffman and Bateson 1997). This set of behaviour patterns is learned through communication and through experience. In a

service encounter customers will perform certain roles and their satisfaction is a function of the degree to which their behaviours and that of the staff are consistent with the expected roles. When consumers are unable to perform their assigned tasks or to comply with the needs of the service production process, the service operation does not function well. This requires a more active management of the situation by the service provider. The greater is the extent of consumers' production of the service, the greater the need for the organisation to manage the consumer performances (Bateson 2002). How well employees and customers understand their roles and the script will determine the effectiveness of their role performances. The function of management in this regard is to provide the environment to enable this to occur. The first function is to design roles for the service encounter, which meet the expectations of both customers and employees and the second function is to communicate the script effectively to both parties so that they have a realistic view of their own role and that of the other party (Bateson 2002).

Script theory is not only concerned with interpersonal service encounters but is concerned with the whole service experience. Scripts will also vary from individual to individual based on their experience and personality. This has implications for new visitors, as well as for repeat visitors and requires recognition on the part of the service provider to educate consumers about the service process. On the one hand script theory closely links the roles that are played by the consumers and the provider in the delivery process and on the other hand it also links the outcomes, so that both are either satisfied or unsatisfied (Hoffman and Bateson 1997).

4.5   Leisure travel experience and the expectation formation process

The leisure travel experience has been classified into five interdependent stages along a continuum: anticipation, travel to the destination, experience at the destination, return travel and the recounting of the memories of the experience (Steward and Hull 1992; Borrie and Roggenbuck 2001). The initial phase of anticipation incorporates the pre-trip expectation on which destination choices are made (Williams 2007). An important part of this stage is the planning of the future leisure experience, which includes information gathering. As was discussed in section 2.4.2, there is also an emotional dimension to anticipation and these emotions are important antecedents in decision-making processes (Perugini and Bagozzi 2001). Personal recommendations from friends, relatives and

acquaintances are an important input in tourism decision-making, as are other external information sources like advertising and the internet. In the disconfirmation of expectation theory, expectations are formulated pre-visit. Petrick and Beckman (2002) identify the importance of the tourist's information satisfaction as an ingredient of overall satisfaction. Based on the information from various sources and reconciling these with personal needs and constraints, the tourist selects a destination. Anticipation is more relevant in first visits and there is greater reliance on information sources to form expectations. This is generally not the case with subsequent visits to the same destination, in which case the prior experience is far more important.

In the case of most goods and services markets, loyalty and repeat purchase appears to be a central goal but in tourism markets this is not a priority. There is normally a considerable time span between visitors returning to a particular destination so loyalty is less significant. However, tourist satisfaction is a direct antecedent of the willingness to recommend the destination to friends and relatives (Bigne 2001). Satisfaction with a visit will result in positive word of mouth and as de Rojas and Camarero (2006) found the higher the level of customer satisfaction the greater the willingness to recommend the visit to others. Satisfied visitors also tend to intensify their experience during the visit so that their stay would be longer and they would purchase more items of souvenirs (Kim and Littrell 1999; Bigne and Andreu 2004).

In a study of museum visitors, Huo and Miller (2007), found that there is a strong relationship between satisfaction and intention to recommend. They also indicate that the services rendered by museum staff plays a major role in increasing the level of satisfaction and a visitor's willingness to recommend to others. Traditionally museums have tended not to be customer focussed but placed emphasis on the management of their collections. Visitors to cultural facilities such as museums and art galleries tend to rely more on personal recommendations (Harrison and Shaw 2004). Visitor evaluation of such a service does not exclusively occur at the end of the service but during it in incremental steps (Harrison and Shaw 2004).

Most tourism models investigating satisfaction tend to rely on positivist approaches in which the tourist is considered a rational being that evaluates the adequacy of tourism products and services based on a mental cost-benefit comparison. A trip is taken with

certain expectations and evaluation is based on the degree to which these expectations are met, not met or exceeded. This disconfirmation paradigm has been widely used in tourism research. In a 'vacation tourist behaviour model' developed by Moutinho (1987) it is claimed that there are three stages in the tourist decision process: pre-purchase influences and decision-making, post-purchase evaluation and future decision-making. The identification of these clearly defined stages may be an over-simplification and does not apply in case of many tourism products. Tourism products like museums could be regarded as requiring high involvement participation on the part of the visitor and the 'journey' through a museum is itself an evaluation process. The tourist may be either satisfied or dissatisfied at the end of it and this is not necessarily through a mental calculation of cost-benefits at the end.

4.6   Customer Value - Influence of price on customer perceptions

Much of the customer satisfaction research neglects the role that price plays in determining value perceptions and satisfaction (Huber et al. 2001). Price of a product or service is a function of the product or service's quality attribute and sends an important signal about the service. Voss, Parasuraman and Grewal (1998) contend that if performance is inconsistent with price charged, then expectation will have no effect on either performance or satisfaction judgments. There is also a stream of research that believes that consumers generally have a reference price points in memory for a good or service, that may be based on the last price paid, the price most frequently paid or the average of all the prices that have been paid for similar offerings (Zeithaml and Bitner 1996, p. 486). This internal reference price acts as a standard against which newly encountered prices are compared (Oh, 2003b).

Gale (1994) suggests that organisational strategies should be reoriented to focus more on delivering superior customer value that incorporates both the costs and benefits of staying with the firm. Zeithaml (1988, p. 14) defines customer value as "the consumer's overall assessment of the utility of the product based on perceptions of what is received and what is given." This exchange forms the basis on which consumers make assessment of the overall benefits of the product or service and does not only include price-quality comparisons but also incorporates value judgements. Monroe (1990, p. 46) defines value as trade-off between quality or benefits consumers perceived in a product or service

relative to the sacrifice they perceive in paying the price, plus other acquisitions costs such as time and risks. Within the exchange context individual value judgements are mainly subjective and often exhibit emotional evaluations as well. From an individual consumer's standpoint the exchange process has a 'give' component which is the price paid or sacrifices made and a 'take' component which is benefit and quality experience derived (Thaler 1985). Consumers do 'mental accounting' in the 'give and take' process but their overall judgement of value would also be influenced by non-price extrinsic cues such as advertising messages and brand image (Dodds et al. 1991; Zeithaml, 1988).

One would conclude from this that value is the perceived service quality relative to price. Value can be understood as a quality/price ratio that manifests itself in 'value for money' but it could also be understood as a price/performance ratio (Christopher 1996). Customer value has also been conceptualised as a utility function where positive utility is represented by the quality-benefits of the offering and the negative utility is represented by price and other sacrifices, where the aim is to maximise the net utility (Lovelock 1991). Service quality will have an influence on value perceptions, which is an antecedent of service satisfaction. Consumer evaluation of service involves the whole transaction (Anderson and Fornell 1994; Johnson 1997; Kamakura et al. 2002) therefore it is important to determine value from a process perspective (Gronroos 2007). This discussion indicates that price is only included in terms of 'perceived value' construct and is usually measured by the two items 'price given quality' and 'quality given price (Anderson and Fornell 2000; Siems et al. 2008). Varki and Colgate (2001) argue that quality is an intrinsic cue that is comparatively difficult to evaluate and that price, on the other hand, is an intrinsic cue that can be observed and compared, making it a stronger determinant of perceived value. In the study of the overall satisfaction in various industries Fornell et al. (1996) found that price played an important role. Similarly in a study of the role of price in the service industries, Voss et al. (1998) found that perceived performance has a stronger impact on satisfaction when there is price performance consistency but that price has a greater impact when there is a price performance inconsistency.

Varki and Colgate (2001) argue that in addition to making quality improvements service managers should improve value perceptions by managing the price perceptions of their customers. Their study found that price perceptions have an important influence on the

customer's value perceptions and overall customer satisfaction, where poor price perceptions increase the likelihood of switching and the likelihood of recommending to others. Lovelock and Wirth (2003) proposes a simple equation that value equals benefits minus costs. Organisational strategies that seek to enhance customer value would need to increase the benefits with the same cost structure so that price to the customer remains the same. Siems et al. (2008) show that there are a lot of price perceptions such as price emotions, price evaluations and price knowledge. They demonstrate that by including price perceptions in customer satisfaction measurement one is likely to expose additional problems and solutions. In their study of zoo visitors they found that many visitors did not have prior knowledge of entrance prices and assumed that the price would be lower than it actually was. They display displeasure when confronted with the actual price and this reduced their satisfaction level.

Matzler et al. (2006) found that the relative importance of service dimensions for "overall service satisfaction" differ from their importance for price satisfaction, suggesting that customers use different cues when evaluating overall service and price. In the tourism sector there is generally reliance on both domestic and international markets making it important to address cultural differences in price-value perceptions. The challenge in pricing for overseas tourist is complex, but where there is reliance on these markets it is important to consider differences in evaluative criteria. The failure of services to meet expectations based on the price paid may lead consumers to attribute their dissatisfaction to others or themselves because consumers believe that they are, at least in part, responsible for their dissatisfaction. This applies more to services than products, which at least can be returned as they often carry warranties (Zeithaml and Bitner 2000).

Bolton and Lemon (1999) found that there was a strong relationship customers' assessment of payment equity and satisfaction, such that the customers evaluate the exchange as more satisfactory when payments are lower than expected or budgeted. They suggest that customers evaluate the fairness of the exchange of inputs (price) and outcomes (service performance). Customers will seek to maintain payment equity in service relationships and will adjust items under their control, such as usage levels, in response to changes made by the firm, such as price changes and perceived changes in service quality. The customer is motivated by the need to budget and control expenditure which results in price having a direct influence on usage such that higher price is

associated with lower usage. Consequently, managers should include measures of the fairness of the exchange relationship in customer satisfaction research.

The three-dimensional framework that explains why a product does not perform to expectation– locus, controllability and stability, can explain the determination of causal inference. The locus dimension relates to the responsibility for the failure, which could either rest with the consumer or the firm. The controllability dimension relates to the degree of power that the consumer or the firm has in their ability to control the situation. This includes price asked by the firm and the consumer is willing to pay. The stability dimension relates to the indictors that such conditions will persist in the future (Oliver 1997, Winer 1986).

The organisation has a critical role in providing the customer with exchange value and in ensuring that appropriate expectations are formed. The role of the organisation is not merely to design and deliver service to the customer, but to manage the value delivered to optimise satisfaction levels. Expectations play an important role in the determination of satisfaction, as we have seen from the earlier sections, therefore the management of the expectation formation is also a critical function of management. The role of management and the various strategies for identifying expectation-perception gaps will be analysed in the following section.

5   Organisational Performance Perspectives

5.1   Organisational performance in context of theory

The models of customer satisfaction have been able to explain and categorise service attributes that may contribute to satisfaction in varying degrees. For instance, the Kano model is able to show which attributes have the strongest impact on satisfaction or dissatisfaction. It reveals which attributes add value and increase satisfaction and other attributes that will meet only the minimum requirements (Matzler and Sauerwein 2002). However, the Kano model is not able to quantify the performance of the attributes and how much or how little they may contribute to overall satisfaction, nor can it explain why the chosen attributes are of importance to customers (Lilja and Wiklund 2006). The reason for this is that they are industry and firm specific and it is the role of organisations to study and better understand how what they and their representatives are doing contributes to satisfaction. Overall satisfaction depends on the service situation and the context of the service encounter. Findings that relate to health-care cannot be used to explain satisfaction with a hotel or a restaurant (Dabholkar 1995).

It is often too easy for management to explain stable or declining visitor numbers on market and competitive forces, rather than to study customer satisfaction and customer value and how the firm is geared to deliver and maximise customer value. Gruber et al (2008) found, for instance, that complaining customers take the contact employee's ability to listen carefully and respond respectfully to what they have to say for granted. Based on Kano's model, the absence of these characteristics in contact employees will have serious results for the firm. Customers are an important and sometimes the only source of credible information about how the firm can improve its products and services (McCole 2004).

Organisational performance needs to undergo continuous improvement is quality and value is to be delivered in a stable and competitive market. In order to make improvements that are effective in achieving customer satisfaction and efficient from the resource allocation point of view, it must be based on the identification of the service attributes that need to be improved and the selection of those attributes that will deliver

the optimum quality and activate the 'service-profit chain' (Anderson and Mittal 2000; Kamakura et al. 2002; Mikulic and Prebezac 2008).

The measurement of customer satisfaction is a prerequisite to implementing and managing organisational improvements, but what actually matters is what changes are made. Mikulic and Prebezac (2008, p. 571) make a number of recommendations for service managers who wish to formulate effective and efficient service improvement strategies:

- Managers should accurately determine which service attributes have the dominant impact on overall customer satisfaction (OCS);
- Be aware that the impact of some of the service attributes on OCS varies according to the current level of performance of that attribute;
- Establish an attribute's level of performance and how this impacts on OCS and;
- Categorise service attributes according to their potential to generate satisfaction or dissatisfaction and to study their impacts on OCS.

These strategies relate to only one side of the service improvement equation and address issues relating to the quality of service delivery, so that its focus is on 'are we doings things right'. In a competitive marketplace, organisations also need a strategy for design quality, which addresses the question 'are we doing the right thing'. It is this question, which is critical to organisational improvement and will make the organisation more relevant through redesign, re-engineering and innovation of the service concept (Fache 2000). Much of the satisfaction literature within both the product and the services area tends to dwell on satisfaction in terms of the current offerings or existing "bundles of benefit" and their capacity to satisfy the customer. "Performance bears a pre-eminent role in the formation of customer satisfaction because it is the main feature of the consumption experience" (Yuksel and Rimmington 1998, pp.63). This view is supported by Churchill and Surprenant (1982) and Parasuraman et al. (1994), among others.

Satisfaction is the result of the consumption experience evaluation by the customer based on "some relationships between the customer's subjective perceptions vis-à-vis objective attributes of the product (Fuchs and Weiermair 2004, p.215). Under the gaps model (Parasuraman et al. 1985; 1988) satisfaction is seen as a reflection of either positive or

negative gaps between expectations and perceptions. The resulting satisfaction level is moderated by the importance placed on the product or service attribute. In the measurement if customer satisfaction, Gronroos (1984) disregards customer expectations and uses a performance only approach. This presents difficulties with the interpretation of the different levels of satisfaction that may be experienced and isolating the source of the satisfaction as either low expectations or superior quality of the service provision. In section 2.4, a number of issues were raised relating to the causes of differences in expectations, which raises questions about the validity of some visitor evaluations that are based largely on expectations. . The performance-only approach to measuring satisfaction appears to be an alternative warranting examination (Kozak 2001a, p. 313).

An important step in achieving customer satisfaction with products and services that are offered is to align the organisation with the key customer values. The challenge for managers is to determine how to maximise customer satisfaction and yet be mindful of the returns on investments. The focus on customers can be a source of insights and innovation that can enable re-engineering and bring about organisational renewal and repositioning. Some improvements in quality can arise from operational strategies, but for lasting and significant changes virtually all activities, programs and policies need to be re-evaluated in terms of their contribution to satisfying customers (Peterson and Wilson 1992). This depth of organisational re-examination will enable the development of a system with which firms continuously monitor how effectively the changing needs and preferences of the market are being met (Shin and Elliott 2001).

5.2   Importance –performance analysis

The importance-performance analysis (IPA) has been widely used to evaluate service quality and introduce service improvements on both efficiency and effectiveness grounds. It was introduced by Martilla and James (1977) as a tool, based on survey data, and could be used to design effective marketing programs. It is considered to be practical because it is based on input from the customer about priorities placed on service attributes and how these contribute towards customer satisfaction (Anderson and Mittal 2000). Qu and Sit (2007), in a study of hotel service found that IPA was able to identify areas where improvement efforts should be placed. The analysis is based customer responses on two dimensions of the service quality attributes, namely, 'how important a particular quality attribute is' and 'how well did the organisation perform this attribute'.

The importance-performance matrix proposed by Zeithaml and Bitner (1996, p. 158) combines information about customer perceptions and importance ratings, which would be acquired through market research. The most commonly used statistical measure is the mean value of the ratings. However, there are a number of modifications based on the use of relative performances and weighted indices (Yavas and Shemwell 2001), mean values and variances (Taguchi 1991; Lee et al. 2008), and the method using the standard error of the importance and performance mean score (Tarrant and Smith 2002). The importance-performance matrix is shown in Figure 6, where the vertical axis represents high and low importance and the horizontal axis represents low and high performance by the organisation in relation to the various attributes.

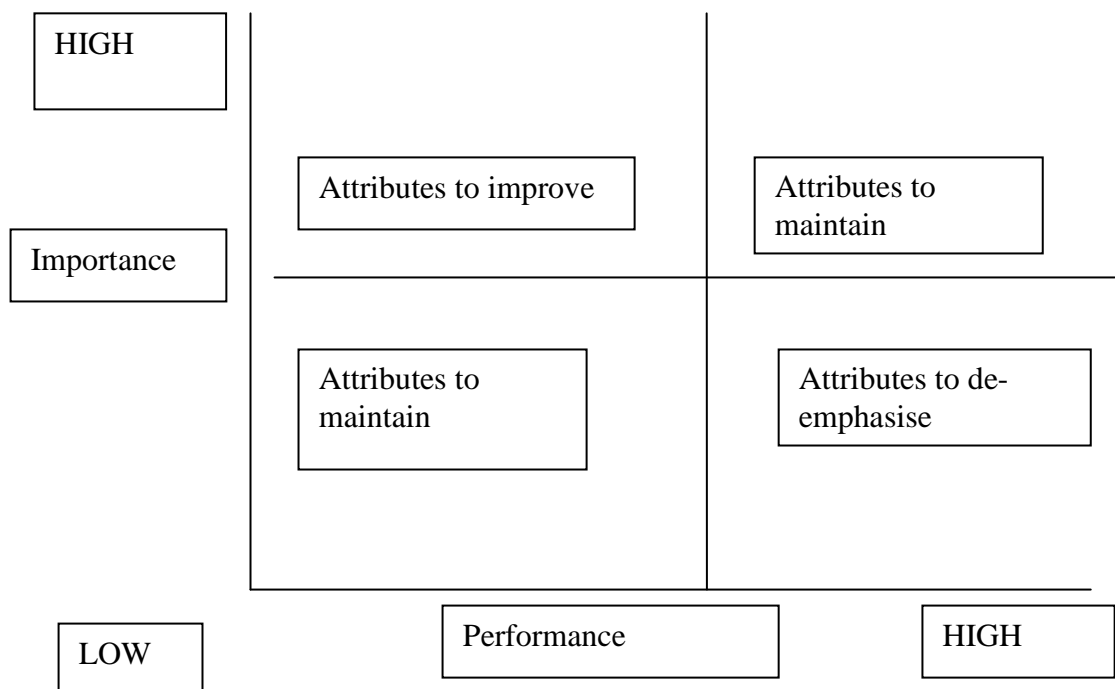**Figure 6: Traditional importance-performance matrix - Identifying attributes to improve**

The lower two quadrants contain attributes that are of less importance to customers and the organisation's performance on these varies from low (weak performance) to high (well performed). The lower importance placed on these attributes by customers give them a lower priority for improvements. The upper two quadrants should get a higher

priority for improvement if performance is low and if performance is high then these attributes will need to be at least maintained at the current level.

Mikulic and Prebezac 2008) depict the typical IPA in Figure 7 as a two-dimensional grid based on how customers score the importance of various service attributes and the performance of those attributes. Based on such a grid management is able to set priorities for service improvements. In Figure 7, Quadrant 1 does not need improvement. Quadrant 2 indicates that the attributes are very important to the customer but they do not rate the performance of the organisation highly. Hence, if resources are deployed to introduce improvements to the appropriate attributes the overall satisfaction will be improved significantly. Quadrant 3 houses attributes that are less important and the organisational performance in relation to these attributes is 'fair', making them non-urgent or 'low priority' in allocating resources to improve these attributes. Quadrant 4 houses attributes that are deemed as only slightly important and where the organisation already performs to a high standard.

Figure 7: Typical importance-performance analysis
Source: Mikulic and Prebezac (2008, p. 560).

Based on customers satisfaction models discussed in section 2, the IPA model may be too simplistic as it linear and does not take into account of the asymmetric effects of attributes in overall customer satisfaction (Fuchs and Weiermair 2003; Tonini and Silveira 2007). According to Kano et al. (1984), for instance, the basic factors ('must-be') are dissatisfiers would need to be positioned with the 'zone of tolerance'. 'Satisfiers' attributes that are performed to a high level will have a greater impact on satisfaction than they will in creating dissatisfaction through low performance. 'Dissatisfiers' attributes will have a greater impact on creating dissatisfaction with low performance than they will in creating satisfaction with high performance (Bartikowski and Llosa 2004).

5.3 The perceived performance model

Tse and Wilton (1988) have put forward the performance model, which tends to give the greatest credence to the actual experience in the determination of satisfaction and discounts the role of prior expectation or previous experience. This may account for the fact that most visitor satisfaction surveys report results skewed towards positives levels of satisfaction. This focuses on the "bundle of benefits" that consumers experience and arise out of the sum of the benefits (pleasure, enjoyment, delight, surprise, etc) derived from the attributes of the product (service) offering. The thesis of the performance model is that some control rests with the organisation making the offerings. There are instrumental and expressive indicators of satisfaction (Noe 1987), where expressive refers to the psychological or social benefit derived from participating in the activity (fishing, swimming) and instrumental refers to a desired end that may include service features like guides and facilities. These are controllable by management. Noe found that expressive indicators of satisfaction that related to core experiences were more important in explaining overall satisfaction. They truly contribute to satisfaction (Czepiel and Rosenberg 1974). On the other hand, instrumental factors are maintenance factors whose absence or failure to meet expectations would result in dissatisfaction. Instrumental and expressive attributes work in combination to produce overall satisfaction. Their contribution to satisfaction arises from emotional (expressive) and cognitive (instrumental) dimensions (Swan and Combs 1976; Uysal and Noe 2003).

5.4 Two dimensions of attribute importance

Howard and Sheth (1969) argue that the performance of an attribute serves both as a pre-purchase choice criteria and post-purchase judgements of satisfaction. Ultimately consumers are driven by needs and wants, which motivate their behaviours. Therefore, attributes are merely the means of linking consumption experience to benefits (Oliver 1997). Smith and Deppa (2009) argue that in examining the role that attributes play in consumption-related decisions we must consider them as part of a "consequential network". Based on extrinsic cues, which are the only information available, consumers make inferences about the role of a particular attribute and these in turn shape their expectations in the pre-consumption decision stages. However, as the consumption experience unfolds the performance of the attributes capacity to deliver becomes more

apparent. In appraising the importance of attributes Smith and Deppa (2009) observed that one is likely to develop two perceptions of attribute importance. The first assessment of the importance of an attribute is derived from cues that shape expectations about the attribute's ability to impact on satisfaction. The second assessment of importance is derived from the real time experience and its influence on satisfaction.

Vavra (1997) developed an Importance-Performance Grid that differentiates two types of attribute importance, namely "explicit" and "implicit" importance. His categorisation of the attributes was based on quantitative measures, where explicit importance was based on the self-reported items on a questionnaire, while implicit importance was based on a multiple regression of groupings of attributes against satisfaction. A number of statistical methods have been used to derive the indirect or implicit measure of importance, such as partial correlation coefficients (Matzler et al. 2003), stepwise regression (Cronin and Taylor 1992), and two-stage least squares regression (Bolton and Drew 1991). There is some debate, however, about whether explicit measures should be used at all (Matzler and Sauerwein 2002; Mittal et al. 1998) because implicit and explicit measures are interchangeable and appear to be measuring the same thing. Smith and Deppa (2009) recommend taking the simple correlation between each attribute's rated performance and the consumers overall satisfaction as a means of obtaining the indirect measures of importance.

5.5   Perceptions of service quality

The characteristics that distinguishes a service from a product are explained by the table below

Table 2: Differences between goods and services

Product (goods)	Service
Customer has ownership of something that is tangible	Customer owns the memory of experiences which are not transferable
Core value is produced in a factory	Core value is produced in buyer-seller interaction (service encounters)
Customer has no involvement in the production process	Customer is a partner in the service production and affect the transaction (inseparability)
Goods are standardised	There is no guarantee that the service will be delivered to plan (heterogeneity)
Quality can be controlled by comparing output to specifications	Customer conducts quality control by comparing expectations to experience
A defective product can be recalled or rejected	A poor or defective service cannot be recalled
Employees facilitate the exchange	Employees affect the service outcome
Supply and demand can be balanced	Difficult to synchronise supply and demand with services

Source: Adapted from Gronroos (1990); Zeithaml, Parasuraman and Berry (1990); Zemke (1992).

In the service evaluation process customers do not merely consider the outcome of the service as distinct from the service delivery process. In the case of goods, quality can be measured against a known set of specifications, while for services this is much more difficult (Zemke, 1992), relying heavily on customer expectations (Zeithaml et al. 1993). A further dimension to this complexity of service evaluation is that expectations are dynamic and may vary not only over time but also from person to person and from culture to culture (Zeithaml and Bitner 1996).

According to Zeithaml and Bitner (1996, p. 104-105) there are four major groups of factors that influence customer perception of service. These are:

- service encounter
- evidence of service
- service image
- price of service.

These factors influence service quality, customer satisfaction and value, all of which make up the key ingredients in the customers formulation of perception of service. A quick survey of the literature indicates that there is some debate about the relationship between service quality and customer satisfaction and there is some tendency to treat the two concepts interchangeably in the tourism literature (Lacobucci et al. 1995; Oh and Parks 1997). From the marketing literature it is clear that the two are different constructs (Cronin and Taylor 1992; Zeithaml et al. 1993; Zeithaml and Bitner 1996). However, there is a strong relationship between them (Cronin and Taylor, 1992; Parasuraman et al. 1985, 1988). While some of the early researchers into service quality identified satisfaction as an antecedent of quality it is now generally accepted that service quality is an antecedent to customer satisfaction (Dahlgaard et al. 2002; Bergman and Klefsjo 2003; Lilja and Wiklund 2006). It should be noted that both quality and satisfaction are generally defined and measured in relation to pre-consumption expectations.

Shostack (1985) broadly defined the concept of a service encounter as 'a period of time during which a consumer directly interacts with a service'. Service encounters are the contact or interaction points between the customer and the service delivery employees and may vary given the nature of the service. These interaction points are sometimes referred to as 'critical incidents', which is defined as specific interactions between customers and service employees that are especially satisfying or dissatisfying (Bitner et al. 1990). In some cases the entire service is produced and consumed in the course of the service encounter. In other cases the encounter may be simply one element in the total production and consumption process (Palmer 1998, p. 61). Where there are only a few opportunities for such interactions, such as a museum, it is more critical that positive evaluations will occur. Service encounters create perceptions about quality and ultimately influence customer satisfaction. Zeithaml and Bitner (1996, p. 114) provide a list of sources of favourable and unfavourable service encounter perceptions presented in Table.

Table 3: General Service Behaviours

Theme	Do	Don't
Employee response to service delivery failures	Acknowledge problem Apologise Take responsibility	Ignore customers Leave customer to fend for oneself Pass the buck
Employee response to customer needs and requests	Recognise and acknowledge need Anticipate Attempt to accommodate	Promise, but fail to follow through Show unwillingness to try Avoid responsibility
Unprompted and unsolicited employee actions	Be attentive Anticipate need Provide information Show empathy	Exhibit impatience Ignore Discriminate

Source: Adapted from Zeithaml and Bitner (1996, p. 114).

The image that the consumer has about an organisation can impact on the perceptions of quality, value and satisfaction. According to Gronroos (1990, p. 170), "Image communicates expectations" and "is a filter which influences the perception of the operations of the firm". The image that a consumer formulates about an organisation is based on their experiences and their expectations. This is built up in the customer's memory through marketing communication, physical images and word-of-mouth. A positive image can act as a buffer against minor service failures; while a negative image is certain to result in dissatisfaction when poor service is experienced. Qu and Sit (2007) found that customer interactions with staff were a key influence on perceptions of service quality. The service management literature places much emphasis on the importance of the human element in delivering superior performance. Service quality in turn is the key factor in visitor satisfaction and overall visitor loyalty.

The other factor that influences perceptions of quality, satisfaction and value is the price of the service. Economists generally define price as a measure of value. Services are generally difficult to judge prior to purchase so consumers tend to rely on price as a surrogate indicator of quality. In other words quality expectations and perceptions are formulated on the basis of price, whereby at higher prices consumers will expect higher quality. Their actual perceptions will be influenced by this expectation. If price is too low consumers may use this as a signal that the organisation will not be able to deliver quality.

5.6   Quality service delivery

Given that services are produced and consumed simultaneously the service firm has greater role in managing the service delivery process in a way that will enable the customer to maximise the value from the consumption experience. Gronroos (1990, p. 37) argues that in services management there are two dimensions to quality and distinguishes between what is delivered ('technical quality') and how it is delivered ('functional quality'). These two dimensions have also been referred to as 'process quality' and 'output quality', where the consumer evaluates process quality during the service and output quality is assessed after the service has been performed.

Quality appears to be a complex concept in services. In order to deliver quality services organisations need to better understand the needs and desires of customers. Parasuraman et al. (1985) propose that it is only through market research approaches that focus on the expectations and perceptions of customers that we can get of picture of the outcomes that are being sought by customers. They also propose that the two basic dimensions of service provision that should be investigated are outcomes and processes. It is only customers who can judge quality and those things that customers perceive to be the most important are therefore also the most relevant.

Once these perceptions and expectations are understood does not in itself deliver quality service. There is also a practical organisational perspective to consider, which relates to the deployment of limited resources. Firms will only be able to deliver the desired level of service if they understand clearly the skill levels and performance of customer contact staff from the view of the visitor or customer (Winsted 2000). Services are generally labour intensive and labour costs in service operations are often relatively high and difficult to control. The issues facing the organisation relate to technical quality (what) and functional quality (how). The technical quality delivery system consists of equipment, supplies, processes, programs and procedures as well as organisational culture (Haksever et al. 2000, p. 28). Providing a quality service which results in a high degree of customer satisfaction must be balanced with the cost of achieving these quality goals. The cost of achieving these goals must also be managed, as these costs could be a true measure of the quality effort (Oakland 1993).

5.7 Expected variance in service performance

Services are characterised by a process simultaneous consumption and production that makes the achievement of consistency in performance difficult (Hoffman and Bateson 1997; DeSouza 1989). The previous discussion of role and script theory showed that the degree of congruence between the role behaviours of consumers and employees impacts on service quality. The notion that of 'zones of tolerance' provides a range of expectations of service quality between adequate and desired levels has also been discussed above and supports the view that there are expected variances in service performance. Customers would be dissatisfied if performance falls below a minimum level classed as adequate service. Customer needs will have deemed to be met if service performance falls within a 'zone of indifference'. However, if the desired levels of service were exceeded customers would be surprised and delighted (Zeithaml and Bitner 2000). Wirtz and Mattila (2001, p. 354) propose that it may be worthwhile to educate consumers about performance variability for services as this may make them more forgiving in case of small variances in service quality.

5.8 Improvements through innovation

While improvements in service can be achieved through more efficient and effective service delivery, firms must not lose sight of the opportunity to use customer satisfaction data together with information on the environment and the market to bring about more long-term changes and improvements. Another way to improve service quality is to introduce more radical changes, replacing existing systems with new and better systems. It means going beyond the usual service and developing new designs, service concepts and delivery systems (Gronroos 2007, Fache 2000).

Fache (2000) argues that a powerful method for introducing change is to base it on customer surveying as a starting point. In other words, the organisation needs to be very customer oriented and actively seek out customer views and expectations. A number of customer surveys focus on such things as the rating of contact staff, rather than on the needs, desires and perceptions of customers. Firms need to have a deeper look at information gathered to uncover the potential for innovation.

5.9   Benchmarking as a tool for identifying performance gaps

Benchmarking is a technique that relies on the identification of 'gaps' between the organisation's performance and the best practice in the industry. According to Yasin (2002), benchmarking can be used to identify operational and strategic gaps and searching for best practices that would eliminate these gaps. Benchmarking has an internal dimension that involves a critical assessment of one's performance as well as an external dimension whereby search is made in the market for practices that could be applied in its operating situation to close the gaps. Zairi (1998) identifies Deming as one of the fathers of Total Quality Management (TQM). Deming was invited to Japan in 1950 and introduced the use of statistical techniques and consumer research to improve quality and stay in business. He campaigned the need for regular customer surveys and the importance of following closely the changes in the marketplace. Zairi (1998, pp. 23-24) establishes the need for a quality assurance system and identifies the following stages:

- evaluate the operations of the organisation against its goals;
- measure performance and ensure that operations conform to customer requirements;
- report the change implementation progress; and
- review the impact of the changes and their effectiveness.

Benchmarking is an important tool in TQM and has long being practiced in Japan during its post-war industrial development. This term was originally used by land surveyors to compare elevations (Kouzmin et al. 1999). In this context, benchmark was the standard. Its application in management is wider and relates to the continuous process of measuring products, services and practices of an organisation against those firms in the industry that are recognised as industry leaders (Camp 1989b, p. 10). This discovery of the best practices in the industry and re-engineering the organisation's operations to match these practices will enable the achievement of superior performance. In some organisations benchmarking is best approached as a way of learning (Bohlke and Robinson 2009) rather than copying, where ready- made solutions are sought for a specific problem (Papaioannou 2007).

The literature identifies a number of different types of benchmarking and the type that is selected would depend on what the organisation hopes to achieve with it. At the highest level is industry benchmarking where a particular functional activity of the organisation is compared across an industry (Rutowski, Guiler and Schimmel 2009). Competitive benchmarking is used to compare the organisation with its direct competitors (Bendell, Boulter and Kelly 1993). Process benchmarking is used to compare similar operations across different companies (Freytag and Hollensen 2001). Internal benchmarking makes comparisons across similar units within the same organisation (Jacques and Povey 2007). There are numerous other forms and variations of benchmarking, such as generic (which searches for best practice outside the industry) and product (which compares goods and/or services).

This search for the 'industry best practices' is in reality constraint bound and is often cost related. The difficulties of gathering commercially sensitive information present a major shortcoming in the benchmarking process. It is also likely to be costly and in practice greater reliance is made of secondary data because they are more readily available. The analytical part of the benchmarking process is data hungry as it is dependent on 'continuous' industry comparison. The implementation of benchmarked standards requires the support of employees because they will be critical to the success of any change process. Difficulties will arise if employees do not understand reasons and the results of the benchmarking exercise and how and why new performance targets and action plans are required (Kouzmin et al. 1999).

Companies that do not practice some form of benchmarking are unlikely to understand their strengths and weaknesses and become internally focussed and reactive. They fail to investigate customers' needs and requirements and how the failings of their performance. With benchmarking practices companies tend to more proactive and avail themselves with the information that forms the platform for change implementation (Camp 1989b). Table 2.5 summaries the advantages of benchmarking and compares the strategic importance of the knowledge gained from the benchmarking process.

Table 4: Reasons for benchmarking

Objectives	Without benchmarking	With benchmarking
Change Implementation	Evolutionary change Sequential but slow change	Ideas from proven practices
Industry best practice	Few new ideas Always playing catch-up	Many options Superior performance
Customer satisfaction	Ad hoc response base on management perceptions Gut feeling approach	Market-based sources for change
Effectiveness of goals	Tend to be reactive Lack market focus	Provides credible and justifiable reasons for change
Performance measures and productivity	Strengths and weaknesses not understood Pursuing pet projects Route of least resistance	Understand outcomes and outputs Able to identify issues and problems Self assessment

Source: Adopted from Camp (1989b) and Zairi (1998, p. 36).

Balm (1996) argues that the benchmarking goal should be 'total customer satisfaction' (p. 30). Customer surveys are useful tools for evaluating the effectiveness and the impact of both goods and services but when linked to more objective indicators, like those obtained from the benchmarking process, organisations are able to better assess their performance (Parks 1984). According to Graham (1994) customer surveys are helpful in agenda setting in seven broad areas: customer expectations, work culture, work design, work-force requirements, hours of operation, costs, remuneration and evaluation. These items can be benchmarked if information on these can be easily gathered on the prevailing industry practices. In the absence of this, internal standards could be set (Wilson and Durant 1994).

The attempt to adopt world-class management practices has often directed organisational attention towards an operational view of improvements resulting in a failure to align such practices with market demands and strategic objectives. The emphasis of benchmarking is on here and now, so that one is in a state of continuous catch-up. From a marketing perspective, the organisational outputs must be effective in meeting customer needs and wants so that the organisation must first ensure that the right things are been done rather than ensuring that whatever is being done are done well, even though they may not be the 'right' things. Performance evaluation must not lose sight of the fact a critical ingredient

for long-term success is relevance to the market. In order to remain relevant to the changing market it is important to manage and deliver customer value.

6   Managing Visitor Satisfaction

6.1   Difficulties with Measuring Visitor Satisfaction

A number of organisations have historically not taken the study of customer satisfaction seriously because of the difficulties associated with the measuring of the relationship between customer satisfaction and profits. In addition, the translation of customer satisfaction data and findings from it into action has often proved difficult. In the tourism sector many of the surveys into satisfaction are short and simplistic and fail to provide insights into what visitors find important or how their perceptions are formed. There are some inherent complexities in understanding visitor satisfaction due to the multivariate nature of "satisfaction" (Westbrook 1982), which engender concepts of "quality and value" and compounded by variables such as motivation, personalities and experiences. Dyer, Aberdeen and Schuler (2002), in reflecting on the state of tourist satisfaction research conclude that the path to an understanding of tourist satisfaction is clearly not straightforward and that there is no consensus on the underlying concepts that may describe satisfaction.

Much of the academic literature on satisfaction comes from the Marketing discipline and stems from the fundamentals of the marketing concept which is based on the satisfaction of consumer needs and wants or desires. Consequently, if consumer expectations are not met it is deemed that that consumer will not be satisfied. The "disconfirmation of expectations" model has a lot of empirical support (Yi 1990; Oliver 1980; 1989; Bowen 2001), indicating that somehow "expectations" are central to the understanding of satisfaction levels. Also, the drive to deliver greater value and superior quality requires an understanding of customer expectations (Parasuraman, Berry and Zeithaml 1988). Others argue that satisfaction with tourism services cannot be separated from an individual's life experience and life satisfaction (Gilbert and Abdullah, 2002). The various aspects of travel and tourism experiences' including the pre-trip, en route, destination and return trip services, have a direct impact on the overall life satisfaction experienced by individuals (Neal, Sirgy and Uysal 1999). The conceptualising of what

constitutes satisfaction and what processes are involved has resulted in a number of researchers developing evaluation standards (Woodruff, Cadotte and Jenkins 1983; Day 1982; Fisk and Coney 1982). Cadotte, Woodruff and Jenkins (1987) argue that while expectations cannot be ruled out as a possible proxy for a kind of standard, it is by no means the only standard consumers use.

Customer expectations are influenced by the nature of the product, the context and the characteristics of the individual (Oliver 1980). The characteristics and the experiences of the individual seem to play a central role in the expectation formation process. The implicit and explicit service promises gleamed from media and publicity, word-of-mouth and the individual's past experiences are also the key to how expectations are formed (Zeithaml, Berry and Parasuraman 1993).

The level of satisfaction experienced by a visitor is influenced by both the quality as well as the value received. In the service sector the "quality construct" and the "value construct" must be differentiated (Sweeney and Soutar 1995), such that value is not always synonymous with quality (Stewart, Hope and Muhlemann 1998). Consumers make judgements on the service (or the visit) both during and after the service, so that the satisfaction experienced will be determined on the basis of a range of service dimensions. These dimensions could range from technical to functional in nature. When the experience is compared with the expectation, we get perceived service quality (Gronross 1984:39). Visitor satisfaction is affected not only by the perception of quality but also by the perceived value to be derived based on the price (or cost) of the visit. In a competitive marketplace price may be used as a proxy for value, providing the customer or visitor with a benchmark for evaluating value and, therefore, satisfaction.

Much of the literature on expectation relates to tangible goods. Tourism operations are largely service based requiring the visitor to come to the location for service "production and delivery" to commence. At the end of the visit the visitor leaves the site with nothing tangible but "an experience." The experience is the outcome of the individual's interaction with people and "product offerings," that make up the attractions of the specific site, a central place, a performance or an event.

From a practical and managerial point of view, it is perhaps best to concentrate on what role actual performance levels on the part of the service provider can play in ensuring that the consumer or visitor experiences the greatest possible value. Spreng, Scott and Olshavsky (1996) in their re-examination of the determinants of consumer satisfaction conclude that given the complexities of the satisfaction process the safest and possibly the best route to enhanced satisfaction may still lie in increased performance.

6.2   Weaknesses of Existing Models

In understanding the satisfaction levels associated with a particular tourist experience it is important to be mindful of a range of factors and issues surrounding the choice of a particular destination at a particular time (Ryan and Cessford 2003; Ryan and Glendon 1998). Zeithaml and Bitner (1996) argue that the concepts surrounding quality perceptions and satisfaction have fundamentally different causes and outcomes and any judgements made about them arise from multiple levels of analysis. The influences on such decisions and the basis on which such decisions are made would influence the expectations as well as the satisfaction experienced with a particular tourist venue.

The Expectation- Satisfaction Models tend to be discrete and as a rule do not account for any external variables, which are beyond the control of the tourist or the service provider (Crompton and MacKay 1989). For example, even with clearly formulated expectations, the satisfaction levels experienced by visitors to an outdoor concert may be greatly influenced by poor weather conditions or by the behaviour of other visitors or by the mere size of the crowd pressure on facilities. In such circumstances, the expectations are unlikely to be exceeded and could not be classed as being met. It could, however, be different, in which case the original expectation is not a good guide to satisfaction.

The Expectation- Satisfaction Models that attempt to explain customer or visitor satisfaction are based on models of consumer behaviour and decision-making process. These relate mostly to tangible goods in a competitive marketplace, where consumers go through various stages from unfulfilled need awareness, information search, evaluation of alternatives, purchase decision to a post purchase evaluation stage. The key underlying assumption of these models is that choices are available.

The very nature of the tourism activity is such that the tourist is motivated to have a good time and would generally have a tendency to downgrade importance of anything that may somehow negatively impinge on the overall holiday experience (Ryan 2003; Ryan and Cessford 2003). Many of these models have not been able to adequately explain and address the issues relating to visitor satisfaction and this has led to the discussion of the issues in relation to "levels of expectation", the "levels of acceptability" and the consumers' "zones of tolerance" (Zeithaml et al. 1993; Parasuraman et al. 1994). More often than not, the focus of visitor satisfaction studies is on the reporting of satisfaction in aggregate terms using visitor characteristics and the extent to which they are satisfied. From a managerial perspective such data is taken as some form of justification and merit for the existence of the program or service. It is seldom a useful policy making or program improvement tool.

In the normal consumer products market, the advice often given by experts is that marketers should return superior value if they are to perform better than competition and that the consumers "expectations" should not only be met but exceeded. In such a situation price becomes the proxy for value and the standard that can be used to compare and measure value. In the tourism markets where choices are available and some understanding of price elasticities exist; the willingness to pay and conduct exchange will be based on how the expectations will be met.

In the leisure market "expectation" appear to be less explicit in the decision process and the consumer market buying decision processes have not been able to adequately explain how and why leisure consumption decision are made. Koran and Koran (1986, p.12) report that a large proportion of museum visitors are there to fill-time, to be entertained or to satisfy curiosity. Much of leisure tourism activities are about discovery and involve a large component of total value or satisfaction coming from aspects that are unexpected, new, or unanticipated. Such reaction is referred to as "customer delight" which arises from "unknown environments" as distinct from customer satisfaction, which arises from known circumstances and known variables (Chandler 1989, p.30). In leisure tourism markets (and especially cultural and heritage tourism) as distinct from consumer product markets, the focus is much more on the unknown and the unexpected. To some degree, customer satisfaction may be influenced by avoiding problems (performance model), while customer delight or surprise with an experience is a deeper emotional response

(Uysal and Noe 2003). Perhaps this is what a number of researchers refer to as "exceeding expectation' (Oliver 1980; Westbrook and Oliver 1991; Hirschman and Holbrook 1982).

6.3 The skewness of satisfaction in leisure services

Levitt (1960) argues that in the services sector getting new customers is difficult because there is no opportunity for customers to try the product, test it or experience it in any way. Customers in the services sector 'usually do not know what they are getting until they don't get it ….and only on dissatisfaction d they dwell" (Levitt 1981, p. 100). Therefore, he argues, marketing effort should be directed on the causes of dissatisfaction, which are human error and neglect. The implication for visitor or customer satisfaction studies is not to attempt measurement of intrinsic satisfaction, but on the degree of dissatisfaction.

Visitor satisfaction studies, especially those in the leisure markets, are always skewed towards satisfaction and this is especially so when it is a free product. Noe and Uysal (1997, p. 223) declare that "a positive halo effect" encompasses leisure-time activities and behaviours. There is a general tendency in leisure and recreational research towards a positive skewness of customer satisfaction ratings (Robinson 1973). William and Patterson (1991) found in their study that respondents tended to rate satisfaction highly, with a very small proportion (<10%) responding with a rating below "mostly satisfies." Normal expectation – satisfaction models, which have much empirical support were developed using data from consumers markets based on an exchange process. With public goods (free) the skewness towards satisfaction is expected to be even greater. Therefore, care is needed in developing measurement tools that are designed to measure satisfaction because the respondent will not have a price that they can use as a proxy for establishing their expectations. This does not take away any control from the service provider, but bestows a greater responsibility on the provider to create value for the visitor through performance, understanding of the visitor's needs and expectations and brand image. The "performance" in this context has a number of components, such products offered, experience given, feelings evoked in the visitor, and various service delivery tasks.

6.4   The use of benchmarking in tourism

Benchmarking is widely used in a wide range of manufacturing and service industries, especially where some form of accreditation systems have been implemented. In the tourism sector the use of forms of benchmarking are quite prevalent, such as in hotel star ratings and also, in the case of food and beverage organisations (Fuchs and Weiermair 2001; Fuchs, Peters and Weiermair 2002; Fuchs and Weiermair 2004). There still remains considerable potential to utilise forms of benchmarking in small and medium sized tourism sectors and even tourist destinations (Kozak and Rimmington 1998, p.184). The benefit of some form of benchmarking could be the key impetus for service improvements even in small tourism firms, without the existence of some industry-wide benchmarks. In a competitive market the firm that is able to best meet the changing needs of the customer is more likely to survive, return greater profits and gain competitive advantage (Ritchie and Crouch 2000; Fuchs, Peters and Weiermair 2002).

Benchmarking has been defined in a number of different ways. Most often it is used as a method or tool for comparing the various aspects of performance with standards of the best in the industry. Unfortunately benchmarking used in this traditionally competitive way does not always lead to customer-driven service (Fache 2000). It may be useful in a strategic way and assist long-term repositioning within the industry, but is not the way to performance improvement and innovation (Fache 2000). In order to achieve ongoing improvements benchmarking must be brought in-house and external comparisons can be dispensed with. Shostack (1987) refers to this as 'service blueprinting' and is a method for analysing the series of steps in the service process. This helps us understand the interdependence between the activities, the programs, the people (both customers and employees) and other elements that makes up the total service (Fache 2000).

At the firm level, benchmarking is about customer responsiveness and the alignment of organisational objectives with the needs of the market. The only reliable source of information about tourism performance is the visitor or consumer and often benchmarks set for performance may, to a large extent, dictated by consumers. Customer satisfaction surveys form the main information sources and because benchmarks are numerical measures, there needs to be greater reliance on quantitative information.

The literature does not provide much insight into firm level benchmarking of performance, because it is most often used at industry level and is defined by desired standards or by industry best practice. Benchmarking is generally thought of as being a process of comparing the organisation's performance against that of the best in the industry (Vaziri 1992). Traditional benchmarking assumes that customers are homogeneous in terms of their backgrounds and characteristics, as well as in terms of their needs, preferences, motivations and behaviours. In reality, visitors to one destination may not be in the same category as for another making it difficult to compare them with respect to certain measures. Tourists who are satisfied at one destination may not be satisfied at another. This makes it difficult to measure external performance and to carry out external benchmarking (Kozak 2002, p. 501). In tourism each enterprise setting has a degree of uniqueness, with specific objectives and programs, as well as business culture and strategy. Tourism venues can differ in attractions, history, traditions and culture, making it difficult to benchmark standards.

In the services sector generally and in tourism enterprises specifically, benchmarking is made more difficult because those things that matter to the customer may differ significantly from one enterprise to another and also because 'quality' uniform across them (Sower et al. 2001; Motwani and Sower 2006). In the tourism literature a number of authors have identified scales developed to measure service quality and customer satisfaction. These are summarised in Table 5.

In a study of best practice benchmarking in the UK (Hinton, Francis and Holloway 2000), it was found that off the 'non-benchmarker' 5 percent were ignorant of the tool, 25 percent faced resource constraints, 29 percent had problems of data comparability, 15 percent believed that they were too small to gain from it and 26 percent considered it not appropriate for them (p. 59). Some of the problems identified by this study were:

- identification of suitable partners,
- identification of comparable data,
- interpretation of comparable data (not comparing like with like), and
- no two companies are alike.

Table 5: Tourism service quality and customer satisfaction scales

Author	Pizam et al. 1978	Poon and Low, 2005	Narayan et al. 2008
Method	Factor analysis.	Factor analysis	Factor analysis (second order)
Accommodation	x		
Amenities			x
Appearance		x	
Beach opportunities	x		
Commercialisation	x		
Costs & pricing Price fairness	x	x	x
Culture			x
Eating & drinking facilities	x	x	x
Environment		x	
Hospitality	x	x	x
Hygiene			x
Innovation & value added service		x	
Information			x
Recreation & entertainment		x	
Tourism experience			x
Value for money			x

This study found that 'internal' forms of benchmarking were the most prevalent rather than participating in benchmarking clubs or networks.

At a firm level, and in the absence of any industry standard, performance improvement must still occur and quality still needs to be managed. In this context, management should set standards so that performance can be judged (Camp 1989). The judgement on performance is determined by the extent to which customers are satisfied and by the proportion of customers not fully satisfied.

7 The need for a performance-value management model

7.1 A "Visitor Value" Management Model

The visit outcomes are the "values" received from the visit or the use of the public good. This is determined by the visitor's expectation of value and quality and the actual experience of the value and the quality. How this can be managed is depicted in Figure 8. The purpose of this model is to identify in broad terms the variables and influences on visitor outcomes, how their expectations are determined and how management can influence their experiences. The model is based on the literature from management and marketing disciplines and provides an understanding not only of how visitor or customer value can be managed in a tourism and leisure setting but also reflects what satisfactions data collection may need to focus on either implicitly or explicitly.
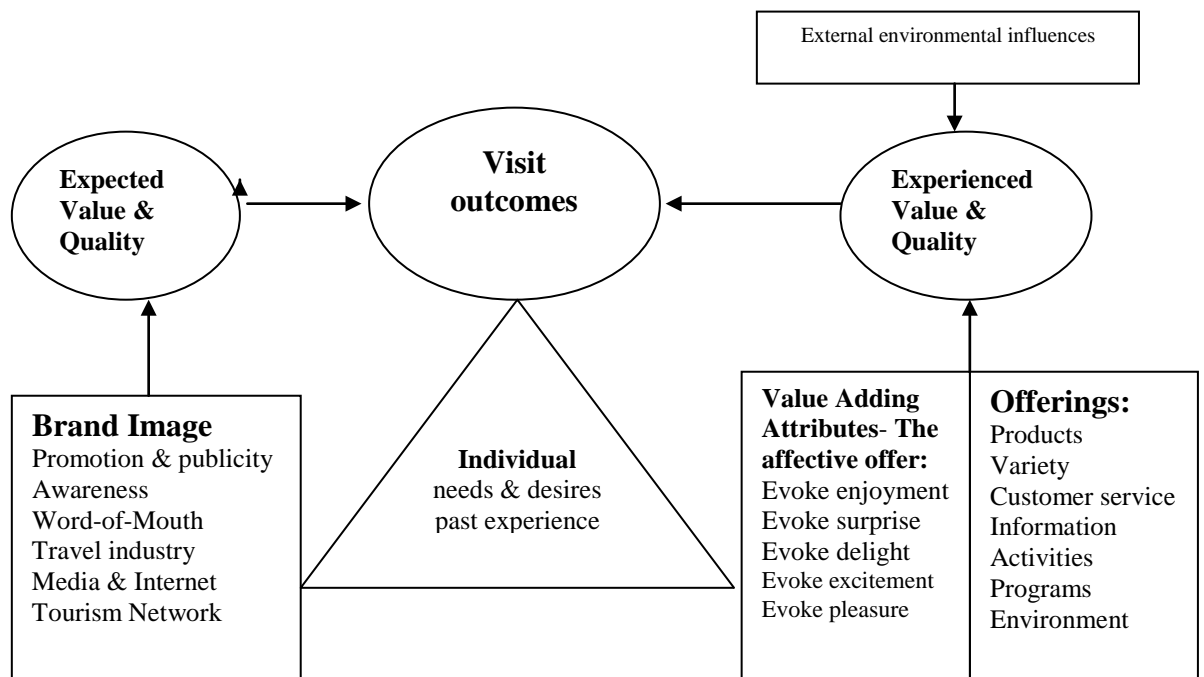

Figure 8: Visitor Value Management Model

Expected value:

The visitor's expectation of value to be received through participation would be shaped by the individual's motivations. The formulation of their expectation can be "managed" through the creation of a brand image, through promotion and publicity programs, through word-of-mouth, and other marketing activities. The literature suggests that expectations may not be a good guide to satisfaction in the tourism sector (Crompton and MacKay 1989; Ryan and Cessford 2003). While there are some "uncontrollable" factors impacting on expectations both on the part of the visitor and the service provide, it is important both in the competitive and the public goods sectors that the tourism organisation see the expectation formulation process as being able to be influenced by the activities, policies and programs implemented by the organisation. Basically, this is the marketing and brand image creation role of the service provider. This model suggests that the expectation creation process needs to be managed and be reflected in the goals of the organisation, especially in the public goods sector and where normal market forces may have limited influence.

Experienced value (Performance):

There are a number of factors that influence the total perceived value. The first group includes the individual personality, lifestyle and motivation, past experiences, as well as their social and cultural background. This is denoted by the triangle in the model. These shape the needs and desires that the individual seeks to fulfil and will have a direct influence on how expectations are formed and their perception of visit outcomes. Management does not have control over any of these elements, but these may influence the nature, design and composition of the offerings.

The value and quality that is experienced by the visitor is defined by the organisational offerings as per its charter. In the case of cultural and heritage tourism the literature supports that service offerings cater for both the instrumental (products, activities and programs) and expressive or emotional dimension, as these work in combination to produce overall satisfaction (Swan and Combs 1976, Uysal and Noe 2003). The cognitive appraisals of the tourism experience results in emotional responses, which are fundamental to the consumption process for any experience to occur (Bosque and Martin 2008). The experience of emotion arises, firstly, from an automatic arousal evoking some fundamental emotions, which are then appraised during or after consumption.

Secondly, cognitive interpretation begins when the customer makes an assessment of the significance of the stimulus towards satisfaction or dissatisfaction (Schachter 1964). Therefore, in the design and development of cultural and heritage tourism products both the emotional and the cognitive dimensions must be considered. It is the role of the organisation to enhance visitor experience of value and quality through the management of its core competencies and to create a brand value that reflects the services delivered. In the model, this is represented by the two boxes, labelled "Offering" (more cognitive) and "Value Adding Attributes" (more emotional). The visitor experience is created or enhanced by bundle of benefits being offered. External environmental forces may also have an impact on this experience.

7.2   A Market-based Performance Monitoring Model

As has been mentioned before, visitor expectations and visitor experiences need to be managed, not only in the context of the competitive marketplace but also in relation to public or private goods and services, if they are to remain relevant and if they are to retain their value-adding potential. This was referred to as the "value management system" in the previous section. The key questions for many organisations charged with delivering relevant and high quality services are:

- what are the relevant information that should be collected and how these should be analysed and used for improving service quality, and
- how to incorporate satisfaction data into effective service enhancements that will better meet the needs of both the customer and at the same time achieve organisational objectives.

In order to achieve continuous improvement and to remain relevant in a changing and often demanding marketplace, performance monitoring and the re-evaluation of operational and strategic objectives, is deemed by many management gurus as an integral part of the management process. The changes in the market mood and trends require constant monitoring. Therefore, a performance monitoring model, which includes quality, value and relevance benchmarking is proposed and presented in Figure 9.

The starting point of any performance evaluation system are the oganisational mission and operational objectives, which guide the various offerings and services; and

consumers (visitors) who are the target of the offerings. The performance-monitoring model is designed, firstly, to measure gaps that may exist between visitor expectations and management perceptions, which may provide indications of program relevance and program effectiveness. Secondly, the monitoring system must provide indications of gaps between service quality standards and service delivery so that performance improvement strategies can be developed. Thirdly, gaps in service delivery and the communication of the brand image need to be identified so that management is in a position to "manage" the expectation formation process and through continuous improvement strategies minimize the discrepancies that may arise between visitor expectations and the visitor experience.

The central feature of this model is to link visitor or customer satisfaction research to organizational missions and objectives. In practice, many satisfaction studies fail to establish this link and therefore reduce their practical usefulness for managers. One of the purposes of this research is to demonstrate how visitor satisfaction research can be aligned to not only organizational performance (which much of the literature concentrates on) but also to organizational purpose and operations goals. Another purpose of this research is to develop a method that will enable managers to benchmark their performance relative to service attributes and operational objectives.
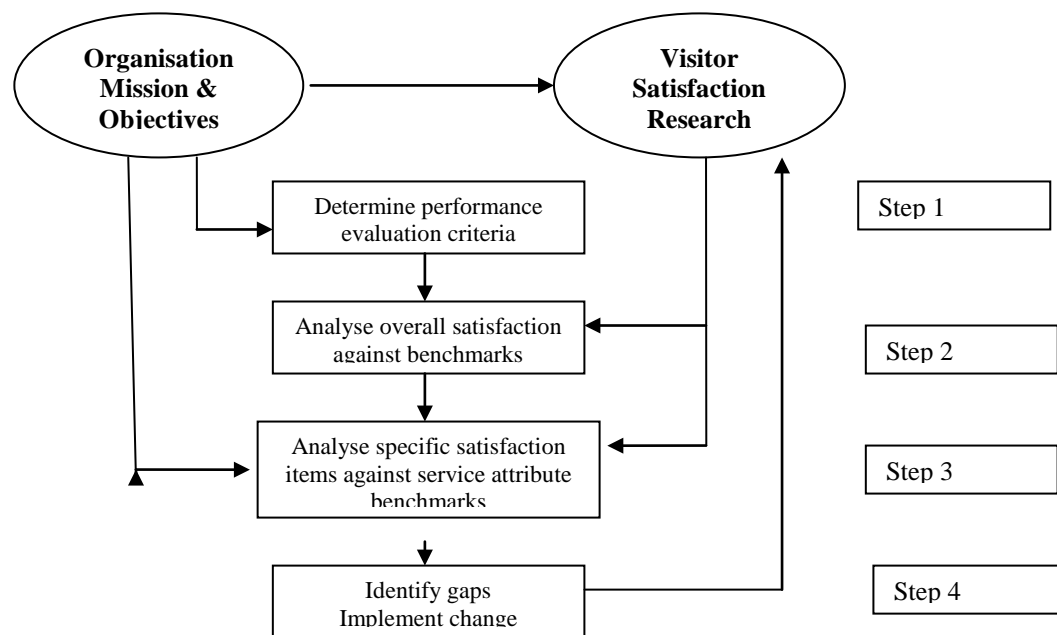
Figure 9: Performance Monitoring Model

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The purpose of satisfaction research is to identify service performance gaps. The gap identification process demonstrated in Figure 9 (step 4) will provide some insight into service achievements against operational benchmarks that have been determined by management as the performance evaluation platform and criteria. These criteria would, for instance, take into account the management capacity and resource availability and may be based on cost-benefit analysis. For example, management may need to access the cost of delivering 100% satisfaction compared to 95% satisfaction and deem it to be not financially viable as the cost of the extra 5% satisfaction may be too high. The establishment of such criteria is an important management function and become more operationally meaningful if they can be related closely to organisational mission and objectives. Some objectives may be more important than others and management would deem that their achievement at a higher level of satisfaction compared to other objectives. Satisfaction gaps in aggregated terms seldom give operational signals or directions, and therefore must be benchmarked against operational objectives. The degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes (Mai and Ness 2006).

Finally, service gaps identified must be remedied. Where service weaknesses are identified or fail to meet set benchmarks, change strategies need to be implemented to improve the service outcomes. These changes will need to be evaluated to assess if outcomes have in fact been improved and can be achieved by smaller specific studies rather than a full-scale visitor satisfaction study that covers all objectives.

In this study, the visitor value management model will be used as a guide in data gathering so that appropriate data can be collective efficiently and within organisational constraints. The market-based performance-monitoring model will be used as a guide to conduct the analysis of the data so that outcomes can be aligned closely to organisational performance as per operational objectives. A methodology for operationalising the findings will be formulated that will identify service gaps.

8   Summary

 Firstly, this literature review establishes that customer satisfaction is a multi-attribute and multi-dimensional phenomenon within a product or service concept. From the organisational performance perspective the Kano Model provided insights not only on the nature of the attributes but also the dynamics of the attributes.   The Herzberg's two-factor theory, which makes a distinction between the factors that cause satisfaction and those that cause dissatisfaction, contributed to the understanding of these attributes. In addition, the SERVQUAL theory and the Expectation-Disconfirmation Model provided grounding for the conduct of the service quality and services marketing research that is designed for service improvements and quality enhancements.

Secondly, this chapter presents research and concepts that provide some insight into customer satisfaction from the consumer and market perspective. The influence of price on customer perception of quality and its likely influence on the degree to which customers may be satisfied or dissatisfied was outlined and analysed. Concepts, theories and models were used to analyse how organisations understand their consumers, study their customers' and develop and deliver services and products that is able to optimise market satisfaction. The focus here was on service deliver, quality improvements and how customer perceptions of service attributes should always be the starting point for any improvement strategy. The overarching theories of customer satisfaction provide justification for studying and incorporating customer views into management processes as well as provides guidance about what needs to be studied and understood.

Difficulties that organisations are likely to face in measuring customer were identified and in the context of this research, visitor satisfaction. Weaknesses in the existing models and theories were identified and discuss the 'skewness' of satisfaction feedback from customers. Finally, a "visitor value" management model is presented that explains and describes the influences and relationships between factors so that the provision of visitor or customer value can be managed. Another role of this review was to present a "market-based performance monitoring model" which may be used to manage and improve service attribute performance against service quality and delivery guidelines set by the organisation with a view to optimising customer or visitor satisfaction.

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Appendix

Visitor Satisfaction Annotated Literature Review Working document.

CONTENTS

Visitor Satisfaction - General

Baloglu, S and McCleary, KW 1999	That the variety, types and quantity of information sources; age and education influence perception/cognitive evaluations.
	That destination image is formed by both consumer characteristics and stimulus factors and that destination image is influenced by multi-dimensional elements. (p891)
	Different types of information sources have varying degrees of effect on perceptual/cognitive evaluations.
	WOM recommendations from friends and relatives were the most important source in forming images about tourism.

Noe, PF and Uysal,M 1997	That visitor satisfaction at sites designed for outdoor experiences depend on expressive elements such as camping and swimming while at historical attractions satisfaction is more dependent on the provision of instrumental elements such as restrooms and shelters.
Swan et al. 1976	That the instrumental performance of a product may be a necessary condition for satisfaction, while expressive responses lead to increased satisfaction.
William and Patterson 1991	Respondents tended to rate satisfaction highly, with a very small proportion (<10%) responding with a rating below "mostly satisfies." Noe and Uysal (1997, p223) declare that "a positive halo effect" encompasses leisure-time activities and behaviours.
Robinson 1973	Found that greater levels of satisfaction are found among individuals involved in leisure activities.
Peterson and Wilson 1992	There is a general tendency in leisure and recreational research towards a positive skewness of customer satisfaction ratings.
Crompton and MacKay 1989	Identify the need to clearly distinguish between the concepts surrounding satisfaction and service quality. Service quality relates to the attributes of the service whereas satisfaction is a psychological outcome emerging from the experience. From a managerial perspective, quality is controllable while satisfaction can only be influenced.
Noe 1987	That there are instrumental and expressive indicators of satisfaction. Expressive = psychological or social benefit derived from participating in the activity (fishing, swimming) Instrumental = means to a desired end – service features like guides, facilities (controllable by management). Found that expressive indicators of satisfaction that related to core experiences were more important in explaining overall satisfaction. They truly contribute to satisfaction (Czepiel and Rosenberg 1974). On the other hand, instrumental factors are maintenance factors whose absence or failure to meet expectations would result in dissatisfaction.
Uysal and Noe 2003	Instrumental and expressive attributes work in combination to produce overall satisfaction. Their contribution to satisfaction arise from emotional (expressive) and cognitive (instrumental) dimensions.
Ryan, C. and Cessford, G. 2003 Developing a visitor satisfaction monitoring methodology: quality gaps, crowding and some results, Current Issues in Tourism, 6(6):457-507	Satisfaction is determined by a number of variables that includes past experience, perceived crowding and levels of tolerance, in addition to the attributes of the place being visited. Argue that there are micro and macro levels at which satisfaction occurs. At the macro level visitors make a holistic judgement of their entire visit and within this are "micro" aspects of the visit which, if deemed less than satisfactory, could either be forgotten or seen as less importance. The problem with many survey approaches is that while they may discover that visitors are satisfied, they often to not indicate what it is that they are satisfied with. Satisfying visitors in those areas that are considered unimportant does not represent a truly satisfying experience, despite the fact that they receive a

	high ranking in a likert type scale. (that's why objective should be the starting point)
	Satisfaction measurement is complex and context bound.

Expectation-Disconfirmation Model of Satisfaction

Oliver 1980 Chon 1989	That consumers develop expectation about a product before, purchase, allowing them to compare actual performance with their original expectation. A positive confirmation (satisfaction) occurs when expectations are met or exceeded. If expectations are not confirmed by performance or consumption experience then dissatisfaction occurs

Equity Theory, Norm, Performance

Fisk and Young 1985 Oliver and Swan 1989	Equity theory is based on the exchange process, where cost is the measure of value expected, where cost incorporates price paid, as well as time and effort devoted. This also includes opportunity cost, such that an activity or destination that results in dissatisfaction will incorporate the alternatives that were available as a part of the choice mix.
LaTour and Pear 1979 Sirgy 1984 Francken and van Raaij 1981	One way in which consumers make judgements about a product or service is by a process of benchmarking based on their past experiences. This is known as norm theory, whereby previous experience provides a benchmark for judging current and future experiences or consumptions.
Tse and Wilton 1988	The performance model tends to give the greatest credence to the actual experience in the determination of satisfaction and discounts the role of prior expectation or previous experience. This may account for the fact that most visitor satisfaction surveys report results skewed towards positives levels of satisfaction.

Role of customer characteristics
Service interactions

Anderson SW, Pearo, LK and Widener, SK 2005	In making judgements on customer satisfaction levels achieved it is important to take account of the differences among customers rather than simply considering the service concept. Customer characteristics such as age, income, gender, and travel experience impact on the composition of overall satisfaction. While both core and peripheral attributes are positively related to overall satisfaction, service interaction plays a more influential role in overall satisfaction (p.31). Their study found that improvements in service interactions produce a greater marginal increase in overall satisfaction than improved operational performance or improvements in the physical elements of the service.

	Merely tracking the level of satisfaction may not deliver a true picture. Research focus should be on the drivers of overall satisfaction and their variance across different customer groupings or segments.

The Context of the Service Encounter

Dabholkar 1995	Overall satisfaction depends on the service situation and the context f the service encounter. Findings that relate to health-care cannot be used to explain satisfaction with a hotel or a restaurant.

WOM

Suskind 2002	High levels of satisfaction with the service encounter generates positive wom communication, but the converse is also true.
Struebing 1996	Attracting new customers through wom recommendations generates new income streams and increased revenue opportunities.
Rust et al 1996	Managers believe that while promotional efforts can increase overall revenue, wom recommendations from friends and family does have a measurable impact on sales.

Role of image, brand identity

Bosque, I.R. and Martin, H.S. 2008	In a study of the interrelationships between the psychological variables of the tourist satisfaction process found that the important dimensions of the process consist of attitudes and prior beliefs, post-experience assessments and behaviourial intentions. This study contends that image image influences expectations and loyality, such that a favourable preconceived image of the destination will have a positive effect on the individual's belief of a future experience. Consequently, the destination will be an important part of the individual's evoked choice set. Furthermore, Bosque and Martin (2008) find expectations to have a significantly positive influence on satisfaction and that disconfirmation does not.
	Tourist satisfaction: a cognitive –affective model, Annals of Tourism Research, 35(2):551-573.
Gronroos 1990	Image is an expectations communicator.

	Service Management and Marketing: Managing the Moment of Truth in Service Marketing. Lexington: Lexington Books.
Bosque et al 2006	Image is an expectation-generating factor of a future encounter with the tourist service
Jenkins 1999	The mental representations that visitors formulate about a destination assists the individual to anticipate their experiences.
	Understanding and measuring tourist destination images, International Journal of Tourism Research, 1:1-15.
Bigne, E., Sanchez, M. and Sanchez, Z. 2001	Images mold the expectations people have formed before the visit.
	Tourism images, evaluation variables and after purchase behaviour: inter-relationships, Tourism Management, 222:833-844.
Bloemer, J., De Ruyter, K. and Peeters, P. 1998	Investigating drivers of bank loyalty: The complex relationship between image, service quality and satisfaction, International Journal of Bank Marketing, 16:276-286
Yoon and Uysal 2005	The tourism image and quality variables associated with a destination impact on both returning intentions as well as recommending intentions of the visitor.
O'Leary and Deegan 2005. Kandampully and Suharatanto 2000	The image of a destination is a critical factor in tourist satisfaction
Mansfield 1992	Image is created through communications and the past experiences of the customer
Castro et al 2007 Andreassen and Lindestad 1998 Bigne et al 2001	Image influences customers' expectations, which in turn play a decisive role in service quality and customer satisfaction

Role of Emotion

Bosque, I.R. and Martin, H.S. 2008	The cognitive appraisals of the tourism experience results in emotional responses, which are fundamental to the consumption process for any experience to occur.
Knowles, P., Grove, S. and Pickett, G. 1993.	The mood of the customer may play an important role in the moment of true satisfaction
	Mood and the service customer, Journal of Services Marketing, 7(4), 41-52.
Zeithaml and Bitner 2003	A good mood may activate positive response to any minor incident

Westbrook, R. A. 1980 Interpersonal affective influences on customer satisfaction with products, Journal of consumer research, 7(1): 40-53. Visitors with optimistic attitudes are more likely to be satisfied than ones with pessimistic attitudes	
Oliver 1997	Emotions are temporary states caused by pleasant or unpleasant dispositions.
Schachter,S. 1964	The experience of emotion arises, firstly, from an automatic arousal evoking some fundamental emotions, which are then appraised during or after consumption. Secondly, cognitive interpretation begins when the customer makes an assessment of the significance of the stimulus towards satisfaction or dissatisfaction.
	The interaction of cognitive and psychological determinants of emotional state. In L. Berkowitz (Ed.), Advances in experimental social psychology, 1:49-80, New York: Academic Press.
Bowen 2001	Tourists emotional responses might be manipulated positively with a guided tour
Chebat and Michon 2003	Positive arousal influences visitor pleasure positively. Pleasure is strongly linked to consumer satisfaction and loyalty in experiencing tourism attractions

Performance: (Importance-performance analysis IPA)

Cronin, J.J. and Taylor, S.A. 1992	Performance based measure of SERVQUAL referred to as SERVPERF and is composed of 22 item scale and excludes any reference to customer expectations. These items relates to customer perceptions of performance
	Measuring service quality: a reexamination and extension, Journal of Marketing, 56(July): 55-68.
Cronin, J.J. and Taylor, S.A. 1994	SERVPERF versus SERVQUAL: reconciling performance based and perception based –minus – expectation measurements of service quality, Journal of marketing, 58(1):125-131
	Supported by: Bolton and Drew 1991 Babakus and Boller 1992 Churchill and Surprenant 1982 Parasuraman et al 1994 continue to argue that service quality measurement that incorporate customer expectations provide richer information than those focused on perceptions only.
Importance-performance analysis IPA	
Carman, J.M. 1990	(It is important to measure the importance of the individual attributes on the perceptions of service quality).

	Consumer perceptions of service quality: an assessment of the SERQUAL dimensions, Journal of Retailing, 6(1):33-55.
Bolto,R.N. and Drew, J.H. 1991	
	A multistage model of consumer's assessments of service quality and value, Journal of Consumer Research, 17(4): 374-384.
Babakus, E. and Boller, G.W. 1992	
	An empirical assessment of the SERVQUAL Scale, Journal of Business Research, 24:253-268.
Huang and Sarogollu 2006	That overall customer satisfaction assessed by derived versus stated importance techniques is similar, but not the same.

Destination Loyalty – determining factors

Petrick 2004	Loyal visitors can be less price sensitive than first time visitors, although first time visitors tend to spend more money during the visit.
Bitner 1990	
Oliver 1999	
Yoon and Uysal 2005	Found a significant cause-effect relationship between travel satisfaction and destination loyalty as well as between motivation and travel satisfaction.
Um 2006	Revisiting intentions are a function of satisfaction, perceived attractiveness, perceived quality and perceived value for money
Patricia, O.V., Siva, J. A., Mendes, J. and Guerreiro, M. 2006	Visitors experiencing higher satisfaction levels are more willing to recommend to others and more willing to return
	Tourist satisfaction and destination loyalty intention: a structural and categorical analysis, International Journal of business and Applied Management, 1(1):26-46.

Why evaluating satisfaction is important

Fornell 1992	It is important to make some assessment of visitor satisfaction if managers are to improve services and continue o remain relevant and effective.
Fornell 1992 Kozak 2001	The evaluation of satisfaction experienced by tourist is a post consumption process.
Fornell, C. 1992. A national customer satisfaction barometer: The Swedish experience, Journal of Marketing, 56(1):6-21. Kozak, M. 2001. Repeaters' behaviour at two distinct destinations, Annals of Tourism	

Research, 28: 784-807.	
Peters 1994 Kotler 1994	In a competitive marketplace, how one is able to manage and respond to the feedback received from customers provides an important source of competitive advantage.
Peters, G. 1994. Benchmarking customer service, Financial Times-Pitman, London	
Noe and Uysal 1997 Bramwell 1998 Schofield 2000	The products and services offered at a destination can be evaluated in terms of their value-adding capacity by understanding and measuring customer satisfaction.
Bramwell, B. 1998. User satisfaction and product development in urban tourism. Tourism Management, 19(1):35-47. Schofield, P. 2000. Evaluating Castlefield urban heritage park from the consumer perspective: destination attribute importance, visitor perception and satisfaction, Tourism Analysis, 5(2-4): 183-189.	
Gursoy and McCleary 2004	The shifting consumer needs have to be analysed and understood on a continuous basis as these will impact on the importance placed on various product attributes
Bowen, D. and Clark, J. 2002	The ability to assess or judge customers' satisfaction levels is the critical first step towards customer retention and long-term competitiveness.
	Reflections on tourist satisfaction research:past, present and future. Journal of Vacation Marketing, 8(4):297-308.
Danaher and Arweiler 1996	Researchers measure satisfaction with the purpose of providing advice to management about what performance needs to improved and to make suggestions for improvements.
	Customer satisfaction in the tourist industry: a case study of visitors to New Zealand, Journal of Travel Research, 34(1):89-93.
Anderson, et al 1994 Oh and Parks 1997	Improvements in customer satisfaction, not only gives a competitive edge, but also can lead to higher profitability.
Anderson, E.W., Claes, F. and Lehmann, D.R. (1994) Customer satisfaction, market share, and profitability: findings from Sweden, Journal of Marketing, 58(3):53-66. Oh, H. and Parks, S.C. 1997) Customer satisfaction and service quality: a critical review of the literature and research implications for the hospitality industry, Hospitality Research Journal, 20(3):35-64.	
	Kawashima (1999) and McLean (1994) found from studies relating to museums that customer satisfaction is an important element of operational (achievement of objectives) success and that customers' views should form an integral part of marketing strategy.
Kawashima, N. (1999)	Knowing the public: a review of museum marketing literature and research, Museum Management and Curatorship, 17(1),:21-39.
McLean, F. (1994)	Services marketing: the case of museums. Service Industries Journal, 14(2):190-203.

How to estimate customer satisfaction

Fornell 1992 Spreng and Mackoy 1996 Bigne et al 2001	Customer satisfaction can be estimated with a single item, which measures the overall satisfaction
Mai and Ness 2006	The degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes
Yoon and Uysal 2005	Stress that satisfaction is multi-dimensional and therefore any attempt to measure it must consider a range of variables
Chon 1989	The tourist's satisfaction with a holiday destination is shaped by their expectations and their experiences at the destination

Price and Value for money

Yuksel and Yuksel 2002	While service quality and satisfaction with the service encounter are important in themselves, the overall value received for the price is critical in revisit decision.
Klassen et al 2005	Price is the most important consideration
Spreng, Dixon and Olshavsky 1993	That prepurchase expectations are a function of both price and quality information. That satisfaction is a function of price, performance, and expectation.
Voss, Parasuraman and Grewal 1998	Contend that if performance is inconsistent with price charged, then expectation will have no effect on either performance or satisfaction judgments.
Um 2006	Revisiting intentions are a function of satisfaction, perceived attractiveness, perceived quality and perceived value for money

Accessibility, awareness and information:

Eichhorn, Miller, Michopoulou and Buhalis 2008	In discussing the needs of disable tourists, raise the notion of customer information satisfaction as a distinct subset of satisfaction. They argue that in order to improve customer information satisfaction service providers should develop communication sources that explicitly target individual expectations in the pre-purchase search stages.
Eichhorn, V., Miller, G., Michopoulou, E. and Buhalis, D. 2008. Enabling access to tourism through information schemes? Annals of Tourism Research, 35(1): 189-210.	
Baker and Crompton 2000 Tian-Cole and Crompton 2003	In the tourism industry the overall satisfaction is derived from not only from attribute satisfaction but also information satisfaction
Tian-Cole, S. and Crompton, J. 2003. A conceptualization of the relationship between service quality and visitor satisfaction, and their links to destination selection, Leisure	

Studies, 22:65-80.	
Hennes& Chabay 2001	Visitors should to be stimulated to move from a 'looking' to a 'learning environment
Hennes, T. and Chabay, I. 2001. From looking environment to learning environment: The networked aquarium of the 21st century, Marine Technology Society Journal, 35:48-59.	
Hill, Woodland and Gough 2007	Hill, Woodland and Gough in a study of visitor satisfaction in tropical rainforests found that visitors who used information sheets in their journey rated the sense of rainforest history significantly higher than visitors without information. They argue that visitors that used information sheets received a ore holistic experience.
Hill, J., Woodland, W. and Gough, G. 2007. Can visitor satisfaction and knowledge about rainforests be enhanced through biodiversity interpretation, and does this promote a positive ecosystem conservation, Journal of Ecotourism, 6(1):75-85.	
Vogt, Fesenmaiser and Mackay 1993	Visitors may seek out what type of experiences to expect at a particular destination before the visit (especially overseas visitors). Travellers therefore need aesthetic as well as functional information.
Vogt, C.A., Fesenmaiser, D.R. and Mackay, K. 1993 "Functional and aesthetic information needs underlying the pleasure travel experience. Journal of Travel and Tourism Marketing, 2(2/3):133-146.	

Recommending

Bolton and Drew 1991 Fornell 1992 Taylor 1997	There seems to be a lot of evidence to support the view that high levels of satisfaction imply positive future behaviour towards the organization supplying the service
Boulding et al 1993	
Ruyter et al 1996	
Zeithaml et al 1996	In a review of preceding research on the customers' future intentions, concluded that there were four major categories: referrals, price sensitivity, repurchase, and complaining behaviour.
Castro et al 2007 Bigne et al 2001	Service quality and tourist satisfaction are significant determinants of the intention to revisit the destination or to recommend to friends and relatives
Castro, C.B., Armario, E. M. and Ruiz, D.M. 2007. The influences of market heterogeneity on the relationship between a destination's image and tourists' future behaviour, Tourism Management, 28: 175-187.	
Hui, T.K., Wan,D. and Ho, A. 2006	Found the likelihood of tourist recommending a destination was positively related to their overall level of satisfaction
	Tourists' satisfaction, recommendation and revisiting Singapore, Tourism management, 28:965-975.
Faullant, R., Matzler, K.	Brand image is a more affective and less cognitive based

and Fuller, J. 2008	perception. Once a given level of satisfaction is attained it is more the emotional perception of the brand image that drives loyalty and influences customers' intention to recommend to others and to revisit themselves.
	The impact of satisfaction and image on loyalty: athe case of Alpine ski resorts, Managing Service Quality, 18(2):163-178.
Huo, Y. and Miller, D. 2007	Satisfaction measurement of small tourism sector (museum): Samoa, Asia Pacific Journal of Tourism Research, 12(2), 103-117 In their study of a museum found that services rendered by staff plays a major role in enhancing the level of satisfaction and a visitor's willingness to recommend a museum to others.
Tian-Cole and Cromption 2003	Found that both overall service quality and overall visitor satisfaction directly influenced the visitor's destination selection
Harrison and Shaw 2004 Heskett, J.L., Sasser, W.E and Schlesinger, L.A. 1997.	Cultural facilities, such as museums and art galleries have traditionally relied on word-of-mouth communication rather than other means of promotion is because it has proved most effective. The best way to generate recommending behaviour is satisfied customers. This shift to market orientation is a turning point in an industry that has given little prominence to the meeting of need of the customers. Traditionally, museums have focused primarily on the care of their collections (product orientation) and lost market opportunities. The higher the level of satisfaction the greater the likelihood that repeat purchase , and advocacy of the organisation's products would occur compared to when someone is less satisfied.
Harrison, P. and Shaw, R. (2004) Consumer satisfaction and post-purchase intentions: an exploratory study of museum visitors, International Journal of Arts Management, 6(2):23-32.	
Heskett, J.L., Sasser, W.E and Schlesinger, L.A. (1997) The Service Profit Chain: How Leading Companies Link Profit and Growth to Loyalty, Satisfaction, and Value. New York: Free Press.	

Previous travel experience

Juaneda 1996 Perdue 1985 Crompton 1992	Positive experience and familiarity with a destination has been shown to increase the intention to travel there again.
Gitelson and Crompton 1984,p199	Familiarity with a destination reduces the risk that may be associate with an unfamiliar destination
Weaver, Weber and McCleary 2007	Found that destination attributes were more important in the likelihood of revisit than previous experience with the destination in itself.

How do consumers form expectations

Oliver 1996 Boulding et al 1993 Ziethaml et al 1990	There are a range of cues and sources of information that consumers use to formulate expectations. These include word of mouth communications and referrals, prior experience with similar situations and marketing communications.
Parasuraman et al 1988:16	In whatever ways that expectations are formed, it is the perception that consumers have about what should be on offer.

Benchmarking

Zairi, M. 1992	One of the difficulties of practicing benchmarking is the obtained information and deciding on which elements of service to get customer feedback on.
	The art of benchmarking: using customer feedback to establish a performance gap, Total Quality Management and Business Excellence, 3(2):177-188.
Zairi, M 1996	While there are external benchmarking there is just as great a requirement to establish internal benchmarks
	Grading system can be set up for any aspect of service delivery
	Benchmarking for Best Practice: Continuous Learning through Sustainable Innovation, Butterworth-Heinemann, Oxford
Kozak, M. and Rimmington, M. 1998	Benchmarking can bring about improvements in competitiveness for both small businesses and destinations, benefiting consumers through clearer indications of service likely to be offered. This is a way of ensuring that service expectations more closely match performance.
Kozak, M. and Rimmington, M. 1998	Benchmarking of small tourism businesses could involve comparison with other similar businesses, or even with a particular service attribute is a different sector.
Bogan, C.E. and English, M.J. 1994	Benchmarking for Best Practice, McGraw Hill, New York

	Benchmarking practice varies according to the nature of the object being benchmarked and the partners with whom comparisons are being made. Process benchmarking relates to business processes, work practices and operations. Product/service benchmarking is used to compare product and/or service offerings. Strategic benchmarking focuses on the comparison of organizational structures, business strategies and managerial practices
Elmuti and Kathawala 1997	An overview of the benchmarking process: a tool for continuous improvement and competitive advantage, Benchmarking for Quality Management and Technology, 4(1):25-33
	Identified four categories of benchmarking: internal, industry, competitive and process
Drew ,S.A.W. 1997

Zairi, M. and Leonard, P. (1994) | There are five basic step in the benchmarking process: 1. identifying the objectives of the study, 2. selecting the superior performer or benchmarking partner, 3. collecting and analyzing the data, 4. setting performance goals for improvement, and 5. implementing plans and monitoring results.
From knowledge to action: the impact of benchmarking on organizational performance, Long Range Planning, 30(3):427-441.

(this establishes a clear link between benchmarking and performance improvement strategies marking a path for gaining competitive advantage.
 Practical Benchmarking: The Complete Guide, Chapman and Hall, London. |
Carpinetti, L.C.R. and de Melo, A. 2002	What to benchmark? A systematic approach and cases, Benchmarking: An International Journal, 9(3):244-255. Management must systematically derive improvement actions from customer expectations and focus on areas that will contribute most to strategic objectives
Balm, G.J. 1996	Our benchmark goal should be total customer satisfaction
	Benchmarking and gap analysis: what is the next milestone? Benchmarking for Quality Management and Technology, 3(4):28-33

Methodology and models	
Ryan, C. and Cessford, G. 2003 Developing a visitor satisfaction monitoring methodology: quality gaps, crowding and some results, Current Issues in Tourism, 6(6):457-507	Satisfaction is determined by a number of variables that includes past experience, perceived crowding and levels of tolerance, in addition to the attributes of the place being visited. Argue that there are micro and macro levels at which satisfaction occurs. At the macro level visitors make a holistic judgement of their entire visit and within this are "micro" aspects of the visit which, if deemed less than satisfactory, could either be forgotten or seen as less importance. The problem with many survey approaches is that while they may discover that visitors are satisfied, they often to not indicate what it is that they are satisfied with. Satisfying visitors in those areas that are considered unimportant does not represent a truly satisfying experience, despite the fact that they receive a high ranking in a likert type scale. (that's why objective should be the starting point) Satisfaction measurement is complex and context bound.
Beard and Ragheb 1983	The Leisure Motivation Scale has been used to identify variables that should be measured to determine visitor satisfaction. The LMS identifies four motives that determine satisfaction derived from leisure pursuits. The first involves the intellectual motive involving activities such as learning, exploring, discovering and may involve thoughtfulness and imagination. The second is the social motive, which relate to and involves the need for friendship and interpersonal relations. The third is the competence-mastery motive which relates to the need to "achieve, master, challenge, and compete". The fourth is the stimulus avoidance motive seeking relaxation, calmness, solitude and the breaking away from routine. (Beard and Ragheb, 1983.225)

Models

Churchill and Surprenant 1982	That the type of product category under consideration would have an effect on how performance expectation influences satisfaction.
Sherif and Hovland 1961	If actual performance is close to expectation, then the level of satisfaction experienced will positively influenced by those expectations. However, if actual performance is sufficiently different from prepurchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgement.

Service quality and satisfaction

Tian-Cole and Cromption 2003	Based on empirical tests claim that at a transaction level, the quality of performance contributed to the quality of the experience.
Bowen and Clark (2002)	There is an emerging support for the view that satisfaction has a close relationship to quality.

ATTRIBUTION THEORY – casual inference

Folkes 1988	Attribution refers to the inference made about the cause of an event or a given situation. Consumers as rational beings search for reasons to explain their dissatisfaction and to explain why something may not have performed to expectation.
Oliver 1997 Weiner 1985	The determination of causal inference can be explained by the three-dimensional framework to explain why a product does not perform to expectation– locus, controllability and stability. The locus dimension relates to the responsibility for the failure, which could either rest with the consumer or the firm. The controllability dimension relates to the degree of power that the consumer or the firm has in their ability to control the situation. This includes price asked by the firm and the consumer is willing to pay. The stability dimension relates to the indictors that such conditions will persist in the future.
Zeithaml and Bitner 2003	The failure of services to meet expectations based on the price paid may lead consumers to attribute their dissatisfaction to others or themselves because consumers believe that they are, at least in part, responsible for their dissatisfaction. This applies more to services than products, which at least can be returned as they often carry warranties.
Chang 2008	Found that the feeling of satisfaction is based on trade-offs between service attributes. However, each tourist has a different value judgment towards individual attributes and may give them different mental weightings. Their overall satisfaction level may be influenced by a single factor that is ranked more highly than others.

DBA – Advanced Study Unit 2

Research Methodology: Issues and Considerations

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Advanced Study Unit

RESEARCH METHODOLOGY

1.   Introduction

This research provides the background and details of the research methodology that underpins the research process. This generally follows a review of the literature, which is used for formulating the research problem. Such a review also facilitates the identification of the important variables in the study. This paper will commence with a discussion of various research paradigms and various classes of scientific enquiry and is followed by a brief discussion of qualitative and case study approaches. The justification for the use of quantitative methodology will be provided, including the theoretical approaches to measurement scales to be used in the research design and will be followed by a discussion of the data collection process. This section will also raise issues relating to data cleaning and recoding conducted prior to data analysis. The final section will outline the choice of statistical techniques used in the analysis.

Methodology refers to the procedure by which knowledge is to be generated. This must be placed in some philosophical context so that we can justify the foundations on which the knowledge gathering is based. This process provided us with the ontology for this research project. While the word 'ontology' has different meanings in scientific philosophy, here it is used to describe the theoretical domain and describes the things that are supposed to exist according to existing theories in the area.   In other words we have developed the specification of our conceptualisation, identifying the groups of issues, the variables within these issues and identifying the ties that may exist between and across them.

There are a number of ontological approaches: realism, empiricism, positivism and post-modernism. Positivism focuses on the observation of reality and emphasises more the claims about facts. Empiricism is about observation and the evaluation of these observations in relation to facts. Under realism facts are deemed to exist

awaiting discovery. Under post-modernism facts are considered to be fluid and elusive therefore limits our focus to observable claims (Cruickshank, 2007). These will be discussed briefly in this chapter.

Epistemology is the study of knowledge. It is a branch of philosophy which deals with the nature of knowledge and how we know what we know, as well as the construction, validation and limitations of knowledge. More specifically, it is the criteria for evaluating the claims that arise from this knowledge (Truncellito, 2007). The required knowledge from this project will come from the specification of the conceptualisation of the problem, data collection and data analysis. All knowledge requires some reasoning, the foundations of which may reside in the conceptualisation. Methodology is the vehicle for the creation of knowledge, and includes data collection, analysis and reasoning.

2   Scientific research paradigms

2.1   Introduction

The conceptual framework within which a research study is conducted is generally based on philosophies and principles which are referred to as the research paradigm (Guba and Lincoln, 1994). This framework acts as the underlying guidelines and assumptions for determining the suitable methods for the conduct of the research. However, the choice of the paradigm and the method of inquiry will depend on the research purpose (Kumar, 1998, p.12). Guba and Lincoln (1994) categorise the scientific paradigms into four groups: positivism, constructivism, critical theory and realism, each in turn have three elements: ontology, epistemology and methodology. (Healy and Perry, 2000, p.119).

It appears that the positivism paradigm stems from the notion of the "rational economic being" but in reality humans do not always act rationally and this is increasingly being recognized creating an extent of merging of paradigms. Qualitative research output is not always devoid of numbers and there appears to a fair degree of overlap in approaches resulting in "qualitative positivism" (Prasad and Prasad , 2002).

While the positivism paradigm is a deductive approach by a study, the inductive approach is represented by the phenomenological paradigm (Perry, 1998a), which is divided into three categories, namely, critical theory, constructivism and realism (Guba and Lincoln, 1994). A phenomenological study is one where a concept or phenomenon is studied based on the meaning derived from the "lived experience" of individuals through the "analysis of specific statements and underlying themes"(Creswell, 1998, p.51 and p.52). The demarcation between inductive and deductive methodologies is by no means clear-cut and the question is one of relative emphasis. For instance, in case study research "some deduction is based on prior theory" (Perry, 1998b, p.788) and the processes of induction and deduction are not procedurally separable (Miles and Huberman, 1994). Table1 provides a comparison of the phenomenology and positivist paradigms:

Table 1 identifies the three elements, ontology, epistemology and methodology, which are used to distinguish between the research paradigms. Ontology is the 'reality' that the researchers investigate, epistemology is the relationship between that reality and the researcher and methodology is the technique used to study the reality. While these elements are generally used to assess the degree to which a paradigm may be appropriate in addressing a particular research problem, they also define the criteria for making judgements on the quality of the research (Healy and Perry, 2000).

'Phenomenology' refers to the study or description of a phenomena and is derived from two Greek work 'phainomenon' meaning 'appearance' and 'logos' meaning 'reason' and may be described as anything that appears to someone in consciousness (Moran 2000). It is difficult to say that phenomenology is a separate and distinct research paradigm, and may best be described as a 'school' of thought, or a research philosophy, inherent in which are three paradigms: critical theory, constructivism and realism (Guba and Lincoln 1994; Perry 1998b). In the fields of tourism enterprise, small business and entrepreneurship the need for qualitative perspectives has been recognized, albeit consciously, with researchers hedging their bets and using a mixture of both qualitative and quantitative approaches. More recently, however, there is an increased degree of confidence in using qualitative approaches as the only form of analysis.

Table 1:   **Paradigm: Extremes of Approach**

Paradigm *Elements*	**Positivist Paradigm**	**Phenomenology Paradigm (School)**
Ontology Reality is investigated	Measure of independent facts about reality Apprehensible reality	Reality is shaped by context in society Individual in society
Epistemology Relationship between the reality and the researcher	Value free Researcher removed from the process –'one-way mirror' Objective knowledge	Discovery requires close interaction between researcher and subject Understanding through 'perceived' knowledge
Methodology Techniques used to investigate the reality	Quantitative Deductive Experimental requiring verification of issues Surveys Describes and explains	Qualitative Inductive Focus groups, action research, interviews, case study. Understand and interpret

Source: Adapted from Cavana, Delahaye and Sekaran (2001); Healy and Perry (2000); Guba and Lincoln (1994).

2.2   Positivist Paradigm and its variations

Research methodology based on positivism has its grounding in the natural sciences and gives greater emphasis on objectivity, measurement, reliability and validity (DeVaus, 2002; Neuman, 2003). Positivism explains human behaviour in terms of cause and effect and does not distinguish between the natural sciences and the study of social life, arguing that social phenomena can be explained in the same way as natural phenomena. The pursuit of objectivity is paramount and this is achieved by the researcher's detachment from the phenomena under investigation enabling us to generalise from our observations of the social phenomena to make explain the behaviour of the population as a whole (May, 1993; Neuman, 2003).

The solutions in the positivist methodology rest with numerical and statistical outcomes which are derived from quantitative techniques. Quantitative research enables the development of clearly defined statistical relationships between dependent and independent variables. The epistemology is based on the independence of the researcher, who neither affects nor is affected by the research subjects. However, the outcomes are dependent on the interpretative skills of the researcher, involving an ontology of discovering the underlying dimensions that influences how an individual or group may perceive something (Perry, 1998b). Critics argue that this focus on identifying abstract relationships fails to take account of many social and environmental realities (Neuman, 2003; Lee, 1992).

The distinguishing features of the positivist and the phenomenological paradigms is summarised in Table 2.

Table 2:   **Distinguishing features of positivism and phenomenology**

Positivist Paradigm	Phenomenology Paradigm
Generally based on quantitative data	Generally based on qualitative data
Requires larger samples	Uses smaller samples
Concerned with statistical testing and identifying relationships	Concerned with generating theory
Data is highly specific and precise	Data is rich and subjective
The location is artificial	The location is natural
Reliability is high	Reliability is low
Validity is low	Validity is high
Can generalise from sample to population	Generalises from one setting to another

Source: Hussey and Hussey, 1997, p.54.

The study of the interaction of the individual and society with its environment has given rise to a number of different approaches which have evolved from the positivist paradigm, including empiricism, realism and interpretive research, among others.

2.3   Empiricism

Empiricism, much like positivism, is based on the premise that we can gather 'facts' about the social world independently of how these may later be interpreted. While positivism aims to collect data from which generalisations can be made, and thereby explain social behaviour through the use of theories, empiricism is not guided by theory in the data collection process (May, 1993). As Bulmer (1982, p. 31) argues, empiricism involves the collection and production of accurate data where the data themselves constitute an end in itself, such that "the facts speak for themselves". Despite this major difference between positivism and empiricism a number of similarities exist between the two paradigms. Firstly, both acknowledge that there are facts about the social word that can be successfully gathered and secondly, that this can be done objectively in terms of the researcher's detachment from the social phenomena and research subjects. It should be noted that in procedural terms the accuracy of the data gathering processes and instruments must be able to be established. This leads us to an even further departure from positivism towards the realism paradigm.

2.4   Realism paradigm and interpretive approaches

The realism paradigm falls within the school of phenomenology paradigms with its focus on the real world understanding through reflection involving open fuzzy boundary systems (Yin, 1994) and requiring value-awareness rather than being value free nor value –laden (Healy and Perry, 2000). One of the critical aspects of social behaviour and for that matter business behaviour, is that it is dynamic and always changing, giving greater credence to interpretive approaches. The positivist paradigm is not appropriate when dealing with a social science phenomenon such as those involving humans and their real life experiences in a policy context.

Realism is based on the premise that the knowledge people possess about their social world affects their behaviour and that the social world does not exist independently of this knowledge. This premise is not a character of positivism or empiricism (May, 1993). The researcher is faced with the task of not only collecting data on the social world but also to explain the underlying mechanisms which form people's actions and prevent their choices from being realised (May, 1993).

Realism research can utilise both qualitative and quantitative approaches is supported widely (Carson and Coviello 1996) when investigating complex social and individual phenomena. There are two dimensions to the understanding of tourism enterprises within a policy context that are of importance. The first is the analysis of how business operators 'see things' and the second is how that 'do things', within the bounds of changeable conditions. It is this insight that can best be addressed by the realism paradigm with its emphasis on in-depth and 'open-ended' interviews, case studies and case biographies for the understanding of experiences. However, customer or visitor satisfaction needs to be grounded in a more widespread gathering of views and because of the large number of visitors that are involved reliance on qualitative measures, which tends to be based on smaller samples can be misleading. Therefore, quantitative measures may be more appropriate. The selection of the research methodology must in the final analysis, depend on the research questions that need to be examined (de Vaus, 2002).

Sobh and Perry (2006, p. 1197) argue that realism research is more likely to provide "an understanding of the common reality of an economic system in which many people operate independently," such "that causal impacts are contingent on their environment." Furthermore, people act in the context of the individual's as well as the firm's external environment, which exists independently of any individual (Gummesson 2000). In the case of tourism enterprises, there is a high degree of probability that in a different timeframe and in a different context their interpretations of issues and events may be different. This is the very nature of the dynamic realism paradigm in which the context is of critical importance. In realism research the existence of one negative result cannot be taken as proof that the underlying issues and mechanisms have been misunderstood, as is generally the case with the physical sciences and positivist paradigm (Sobh and Perry 2006; Gummesson 2000; Yin 1994).

2.5   Phenomenology

The phenomenology paradigm involves the ontology of discovering the underlying reasons and conditions which result in the formation of a perception about a situation, activity or event (Perry, 1998b). Natural science and social science can be differentiate on the basis of epistemology that people with free will make choices

regarding their actions and may choose to act differently under identical conditions and circumstances (Moran 2000). Phenomenologist content that the world is largely how humans perceive it to be (Cavana et al 2001), however, this would be influenced by the prevailing conditions. Environmental and business conditions are dynamic and being able to generalise the findings from one study across to other situations is of less importance. Data for such research can be collected using carefully designed surveys as well as a myriad of more qualitative means, so long as they are grounded in theory. The ability to generalise the results is not critical (Perry, 1998b).

In those disciplines that focus on the understanding of the experiences of people within a living setting or context, the phenomenology research approach is becoming increasingly popular (Crotty, 1998). Phenomenology aims to "transform lived experience into a textual expression of its essence" and "there is a determinate reality-appreciation in the flow of living and experiencing life's breath". (Van Manen, 1990, p.36). It attempts to give a description of our experience as it is rather than seeking some causal explanation (Hayllar and Griffin, 2004). Ryan (2000) argues that phenomenology is a possible method of tourism research because this approach gives the central focus to the understanding of individual experiences and is ultimately about what people perceive in the world.

Phenomenology has proved to be a valuable methodology in tourism research but greater attention needs to be paid to its philosophical underpinnings that are based on perceptions, individual meanings and uniqueness (Szarycz, 2009). These features have implications for 'objectivity, generalisability or theoretical abstraction' requiring much care if such claims are intended (p. 53)

3   Qualitative and quantitative research

Quantitative and qualitative are the two dominant research methodologies used in the social sciences, the underlying differences between them is summarised in Table 3. There is much debate about the merits of each and there are purists who believe that the two methods should never be mixed (Onwuegbuzie and Leech, 2005), while researchers who consider themselves pragmatists advocate integrating methods into a single study (Creswell, 1994). The choice of research method should be a function of

the research questions and must be regarded as "merely tools that are designed to aid our understanding of the world (Onwuegbuzie and Leech, 2005, p. 376).   Lee (1992) argues that researchers should not be restricted to either quantitative or qualitative methodologies and should be flexible, using both methodologies in seeking answers to the same research questions.

Qualitative research studies are field focused acquiring data in natural setting (Eisner, 1991; Denzin and Lincoln, 1994; Creswell, 1998), the researcher being the data gathering instrument where the focus of the outcome is process rather than product (Hill and McGowan, 1999). A range of empirical material is gathered and studied through case study, personal experience, life story, interview, observation and other methods to describe and analyse " routine and problematic moments and meaning in individuals' lives" (Denzin and Lincoln, 1994, p.2).

Over the last few years there has been a recognition that when it comes to the understanding of peoples' attitudes and motivations, the complexities of the human or organizational conditions much remain unexplained by quantitative and statistical means (Hill and Wright, 2001; Wright and Crimps, 2000). Policy research and research of tourism enterprises is recognized as being too recent in its development for it to deliver incisive benefits through a positivist approach that relies on the use of quantitative methods of inquiry (Churchill and Lewis, 1986; Bygrave, 1989; Shaw 1999; O'Donnell and Cummins, 1999).

The consequence of much of the underlying issues and concepts not being adequately identified or defined results in much of the academic recommendation that qualitative paradigm as being more appropriate for policy and social studies (Sexton & Bowman-Upton, 1991; Aldrich 1992; Brown and Butler, 1995). Social and much of business research involves the study of human actions and behaviour, and as such is concerned with the nature of reality in the social world (Shaw, 1999). Therefore, the pure positivist approach is not deemed appropriate (Gill and Johnson, 1991). It is the qualitative approach that will allow small firms to be examined holistically by getting a close understanding of the actors, their realities, their perceptions and their motivations. It is not adequate to merely document a human phenomenon in a business setting but rather to explain the parameters of a situation or condition through

meaningful analysis of reality (Brown and Butler, 1995). The 'how and why' dimensions of individual action require a contextual insight in order to gain a deeper understanding of the forces, considerations and issues and issues that may impact on individual action or decision (Borch and Arthur, 1995). From the foregoing we can conclude that the study of many social situations and businesses would best be examined holistically in its social and environmental context by getting close to the participant. In the phenomenological paradigm the focus is not on measuring, but understanding the social construct (Leavy, 1994; Creswell, 1998).

Qualitative studies are justified where the nature of the research question is such that the topic cannot satisfactorily explain the motivation or behaviour of individuals without a deeper insights being explored (Creswell, 1998). Furthermore, where the variables are not easily identifiable and when the emphasis is on how a particular outcome is produced, rather then the outcome itself, then qualitative approach is more appropriate (Patton, 1990).

Quantitative research studies generally fall with the positivist and post-positivist philosophy. Positivist research tend to be based on quantitative data and characterised by objectivity for the purpose explaining and identifying causal relationships between variables and events (Neuman, 2003). The positivist paradigm seeks its solutions from statistical aggregations and analysis. Creswell (1994) argues that quantitative research is premised on constructs, definitions and propositions that present a systematic view of a phenomenon, designed to specify the relationships between constructs explaining the phenomena. In quantitative research explanation is derived from experience using formal or systematic procedure and based on statistical techniques and computer models (Sarantakos, 1993).

 The aim of quantitative research is to determine the relationship between one thing (an independent variable) and another (a dependent or outcome variable) in a given population. Quantitative research designs are either descriptive, where the subjects usually measured once, or experimental, where the subjects are measured before and after a treatment. A descriptive study establishes only associations between variables. An experiment establishes causality (Hopkins, 2000)

For an accurate estimate of the relationship between variables, a descriptive study usually needs a large enough sample of subjects so that meaningful statistical analysis can be undertaken. An experiment, on the other hand may need only tens of subjects. The estimate of the relationship is less likely to be biased if you have a high participation rate in a sample selected randomly from a population. In experiments, bias is also less likely if subjects are randomly assigned to treatments, and if subjects and researchers are blind to the identity of the treatments (Hopkins, 2000).

Table 3:   Differences between quantitative and qualitative methodology

Features and characteristics of research	Quantitative methodology	Qualitative methodology
Nature of reality	Objective; simple; single; tangible sense impression	Subjective; problematic; holistic, a social construct
Cause and effect	Nomological thinking; cause-effect linkages	Non-determinestic; mutual shaping; no cause-effect linkages
Epistemology	Possible to obtain hard and secure objective knowledge	Understand through perceived knowledge
Role of values	Value neutral; value-free inquiry	Normativism; value-bound inquiry
Researcher's role	Detached; passive; separate from subject	Active; interactive and inseparable
Research problem	Who – how many? What – how much?	How? Why?
Literature review	Explanatory – what are the previously identified and measured variables. Relationship between variables. Hypothesis and propositions are developed	Exploratory – what are the variables involved. Constructs are messy. Research issues are developed
Methodology	Description and explanation; e.g. - survey or experiment	Understanding and interpretation; e.g. case study or action research
Models	Deductive; based on strict rules	Inductive; ideographic; no strict rules; interpretations

Source: Adapted from Sarantakos, 1993, p.53; Healy and Perry, 2000.

Perry (1998b, p. 787) argues that case study research is the preferred methodology for the realism paradigm. The most common methodology used in the conduct of research in the field of public policy and public administration has been the case study method (Yin 2003). Where situations, conditions or issues pertaining to a particular individual or circumstance need to understood, the documentation of the individualized outcomes may need to be documented and analysed (Patton 1990).

There is a wide range of research based on case studies, especially where a phenomenon needs to be examined in a bounded context (Stake, 1995) and become popular over recent years in areas of management, human behaviour and entrepreneurship. However, the technique is by no means new, as it was made prominent by anthropology Margaret Mead (1901-1978) and has been used in management research for many decades as exemplified by the Tennessee Valley Authority study dealing with the decentralization and political behaviour resulting from the TVA Act (Selznick, 1949), and the classic work on bureaucracy by Blau (1955).

One of the key features of case study is that it conducts in-depth study of the individual, groups, organization, situation or events in its natural setting. It is acknowledged, however, that there are a number of different types of cases studies, but they generally fall into three distinguishable categories. Firstly, the intrinsic case study, which is designed to provide a better understanding of a particular case and while generalisation is not an expected outcome, the focus is purely on the case itself for the purpose of acquiring an insight into the complexity and the context surrounding the case. Secondly, the instrumental case study, where a particular case is studied closely to provide insight into an issue, or to refine a theory. This is common in medical sciences and law, where a case may be studied because it does not fit the norm. In the first two categories the focus is generally one a single case, as what is required to be shown, or discovered lies within the case itself. Thirdly, where the is a need to understand a population or explain a phenomenon and/or its context, several cases many be required as a collective and this requires the instrumental case study to be extended to several cases (Stake, 1995).

Where a collective of case studies is used the intention is generally to demonstrate broader application. Despite the fact that each case is unique in some aspects, there may be some features of the cases that are similar, and it is from here that generalizations may be drawn. Case study methodology is chosen because of the need for in-depth understanding of a few cases offering richness of data and where, through cross-case analysis, generalizations may be made.

5.   Measurement scales and scale development

Measurement is central to scientific inquiry (Kumar, 1996, p. 58). In the physical sciences measurements need to be precise, but this is less so in the social sciences. In social sciences the emphasis on precision can vary between the disciplines. A nominal scale allows the classification of individuals, objects or responses based on like characteristics, resulting in sub-groups. For example gender would have sub-groups males and females. Ordinal scales are similar but they enable ranking to occur. For example we can a purely quantitative measurement of income in dollars, or qualitatively into sub-categories 'above average, average, and below average'. Interval scales have the characteristics of ordinal scale (allows sub-grouping), but also enable placing the units ay equidistant intervals. This makes it a relative measure allowing us to study responses in relation to each other. The Likert scale is an example of this.

The Leisure Motivation Scale (LMS) has been used to identify variables that should be measured to determine visitor satisfaction. The LMS identifies four motives that determine satisfaction derived from leisure pursuits. The first involves the intellectual motive involving activities such as learning, exploring, discovering and may involve thoughtfulness and imagination. The second is the social motive, which relate to and involves the need for friendship and interpersonal relations. The third is the competence-mastery motive which relates to the need to "achieve, master, challenge, and compete". The fourth is the stimulus avoidance motive seeking relaxation, calmness, solitude and the breaking away from routine. (Beard & Ragheb, 1983, p. 225)

Churchill and Surprenant (1982) argue that the type of product category under consideration would have an effect on how performance expectation influences satisfaction. If actual performance is close to expectation, then the level of satisfaction experienced will be positively influenced by those expectations. However, if actual performance is sufficiently different from pre-purchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgement (Sherif & Hovland 1961). Therefore, visitor satisfaction data collection should be based on at least two dimensions.

6   Survey instrument design considerations

6.1   Introduction

The first dimension is to seek information on satisfaction levels reached across a range factors deemed pertinent to the individual with respect to the activity, such as a visit to a museum. As discussed previously, there are instrumental (maintenance factors) and expressive indicators (core experiences or benefits) of satisfaction (Noe, 1987; Czepiel & Rosenberg, 1974). This can be measured using a numerical scale. In this study the level of satisfaction, across a number factors, was measured using a 6-point scale (with 6 being Very High and 1 being Very Low).

In the literature, any attempts to measure opinions or attitudes typically utilise either a 5-point or a 7-point scale, which provides a mid-point with equal number of options on either side. The purpose of selecting a 6-point scale was the desire to present a continuum so that a benchmarking decision system could be developed. Often in a Likert-type scale mid-points can represent "unsure" and would be mathematically unusable for benchmarking purposes unless the cases in the mid-point were ignored from the analysis. That is not to say that these cases are unusable or meaningless, because they may possess "hidden" or underlying meaning, especially in relation to what respondents may not be saying.

The second dimension is to seek information, opinions and attitudes on "performance", as suggested by the literature discussed in the previous section. In order to collect relevant information on "performance" one needs to understand the nature and characteristics of the industry (if relevant) and more specially, the missions and objectives of the enterprise. This will identify the issues that the research must address if visitor satisfaction is to be meaningfully measured.

Consequently, the visitors were asked to indicate their level of agreement or disagreement to twenty items (statements) using a 5-point Likert scale (5 = Agree Strongly to 1 = Disagree Strongly). These items were selected based on the typical objectives that the organisation was deemed to be pursuing, using the literature and publicly available information.

6.2   The choice of scales

In the questionnaire design stage careful consideration was given to the choice of scales as well as the choice of the number of categories. One important and overriding consideration was that visitors would complete the voluntary survey at the end of their visit may face time pressures. The number of categories in the scale and the number of items that needed to be addressed had to be carefully balanced with time taken to respond. Therefore, it was considered that 7 – point scales would unnecessarily increase the complicity and discourage thoughtful response. The number of items was limited to the minimum that would be required to address the performance objectives.

The measurement used to address the satisfaction level was a 6 – point forced scale, so that there was no mid-point which could be used to give a neutral or no opinion category. As explained above, this was done more for operational reasons with a view to using the data to develop decision benchmarks. One weakness of this approach is that in cases where the respondent had not formed an opinion about the item they would still be forced to take a position on the item. There is, in such cases, always an option for the respondent not to respond to the particular item, and would be registered as a "missing value."

7.   Research Considerations

The norms in society are continuously changing and consequently the ways in which various professions serve society changes. Most people are familiar with ethical considerations in marketing and how these may impact on individuals and consumers. Unethical practices in this area has led to the rise many consumer advocate organisations and legislations to protect consumer rights. Different professions have different codes of conduct, some self regulated and others regulated by legislation. There are legislations like the privacy laws which cross all professions and in some ways define codes of conduct.

In research activity there are a number of stakeholders, such as those that participate in research as subjects. This includes both human and non-human research subjects. Those from whom information is collected or those who are studied by the researcher are participants and rights must be protected. The researcher is also a stakeholder and must abide by rules of ethical conduct. A body funding the research may have a vested interest in a particular finding or the way a research is to presented. This can compromise the ethical standing of the research. The independence of the parties is important in the maintenance of ethical standards of research.

In data collection the wasting of the respondent's time may be deemed to be unethical. Therefore the research purpose and objectives must be worthy and of some value to society. If the research is going to be of some benefit to society directly or indirectly it is acceptable to ask questions provided that the respondent's informed consent is provided. Therefore it is important justify the relevance of the research, the reasons for which data is being collected and how they will be used. Respondents must be in a position to give such informed consent. Sharing information about a respondent with others is unethical. It is important to maintain confidentiality and respondents must be willing and able to provide information.

The researcher has obligations in the research process. One such obligation is the use of an appropriate methodology. This could apply to sample selection (which could be biased), the data collection instrument must be valid, and conclusions should be drawn that are justifiable.

Sometimes organisations may commission a research to justify their decision. Participation in such an exercise will be unethical.

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DBA RESEARCH PROJECT 1

Visitor Satisfaction Study

Sovereign Hill

Ballarat

Shameem Ali
University of Ballarat
November 2010

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1.0   Introduction

1.1   A brief history and context of the study

The Sovereign Hill Mission :

To present in a dynamic group of museums, the mining, social, cultural and environmental heritage of the Ballarat region and its impact on Australia's national story.

The Vision: To be a leader amongst the world's best outdoor heritage museums.

Sovereign Hill was the creation of a group of enterprising Ballarat businessmen with a desire to develop a facility that would preserve Ballarat's great gold mining history and heritage. Today, Sovereign Hill is a world-class living outdoor museum that attracts almost half a million visitors annually and injects $40 million into the Ballarat economy.

Employing more than 600 staff and volunteers, Sovereign Hill is a not for profit organization that invests its profits back into capital improvements.

Sovereign Hill has made a profit in all of its 35 years of trading, with limited assistance from government. Compared to other museums that are reliant on government subsidies, Sovereign Hill makes a profitable return.

The success is due partly to Sovereign Hill's ability to recreate the magic – giving visitors a reason to come back – and the development of commercial projects to provide ongoing financial returns.

Since opening in November 1970 with an activated recreation of an 1850's Streetscape, expansions have included:

- the Gold Museum, managing a $7million collection;
- Sovereign Hill Lodge, a four-star motel located on-site;
- Blood on the Southern Cross, a sound and light show presenting the Eureka Rebellion story with day entry, dinner and accommodation packages available; and

- Narmbool, an historic rural property where Sovereign Hill's education programs are presented in a bush environment;

A major contributor to regional economic, social and cultural development, the Sovereign Hill experience attracts day and overnight visitation to Ballarat.

Management and staff participate in industry panels and represent at conferences, sharing Sovereign Hill's strategies as an example of industry best practice.

Sovereign Hill was voted 's Number One Major Tourist Attraction at the 2006 National Tourism Awards – the second time it has won this coveted award.

Sovereign Hill was also voted Victoria 's Major Tourist Attraction at the State Tourism Awards in 2003, 2004 and 2005 – placing it in the Tourism Hall of Fame.

Source: http://www.businessballarat.com/?id=sovereignhil

www.sovereignhill.com.au

1.2   Industry Trends

Reports commissioned by Parks Victoria over the last few years indicate that there is strong support in the community for the preservation of heritage buildings for future generations. The majority of Victorians also support an entrance fee for significant sites such as the Mansion and strongly support the notion that adequate resources should be allocated for heritage sites. Over the last decade or so there appears to be a clear shift towards re-linking with our past, exemplified by the way in which the young have embraced the reconnecting with the ANZAC traditions, with most people seeking for the sense of history and heritage.

1.2.1   Tourism trends

Historical or heritage buildings, sites or monuments had the highest rate of attendance by international cultural and heritage visitors (61%), followed by Museums or art galleries (57%). Visiting museums or art galleries was the most popular cultural activity for domestic overnight visitors, with 44% attending, compared to 35% of domestic day visitors (ABS

2009). Visits to Historical/heritage buildings, sites or monuments attracted 30% of overnight visitors and 24% of day visitors. Other popular venues included Zoological parks and aquariums (an attendance rate of 36%), Local, state and national libraries (34%) and Botanic gardens (34%). Between 1998-99 and 2003-04, total household expenditure on culture increased from $26.74 to $36.40 per week (ABS, 2009).

1.2.2 Economic conditions

In the period between 2008 and 2009, the tourism industry in Australia, like many other industries, had been affected by the global financial crisis. While Australia has recovered from the recession in such a short time (Tourism forecast 2009), consumer confidence had declined and many Australians curtailed their discretionary spending. The tourism and entertainment industries are substantially influenced by a downturn in economic conditions. This downturn may have contributed to the lower Sovereign Hill visitation and somewhat flattened the peaks that normally occur during the main holiday periods. However, there has been a persistent downward trend over a number of years that cannot be explained in economic terms and may be associated with a range of factors such as competitive pressures from other accessible destinations and the growing prosperity created by high rates of economic growth.

1.2.3 Demographic shift

With 'Baby Bombers' representing the largest age group of Australians (36%), this can be a viewed as an opportunity for Sovereign Hill. As the Baby Boomer generation begin to retire time for trips and tours become available (Regional Tourism Action Plan, 2010). The attractions at Sovereign Hill are clearly geared to this age demographic; however, more could be done to ensure 'an experience' desired by this group is achieved. Currently, the facilities and attractions at Sovereign Hill do not cater adequately to other groups, such as families.

The emergence of new media, the easy access to information and the possibility to compare tourist destinations have made consumers savvier and they can better estimate the value for money propositions (Regional Tourism Action Plan 2010); hence Sovereign Hill will need to

find a niche in their market. With the removal of entry fee from July 2010, this may no longer be a consideration. It will also be difficult to monitor visitation numbers to the park and the Mansion.

1.3 Study Objectives

This study is designed to understand the tourist expectations and satisfaction levels with this destination and how visitors determine value for money and the extent to which this impacts on recommending behaviour. Visitor satisfaction studies provide the primary source of data about how the market perceives the offerings and generally forms the basis on which program managers can implement program modifications and change. Many tourist destinations are visited more than once by domestic tourists especially and program and offering renewal has become an integral part of strategies museums, for example, use to attract repeats visitors. Visitor satisfaction studies can provide insight into the changing needs of the market and are a good way of generating new ideas for service improvements as well as for keeping the offerings relevant for different market segments.

This study will address the following key issues:

- Levels of satisfaction reached on offerings (products and elements) based on the expenditure incurred.
- Overall value for money (did experience and enjoyment justify costs)
- Knowledge of costs involved prior to arrival
- How decision to visit was made and what role did cost play in this decision.
- What were the major influences on decision to visit.

1.4 Methodology

The Leisure Motivation Scale (LMS) has been used to identify variables that should be measured to determine visitor satisfaction. The LMS identifies four motives that determine satisfaction derived from leisure pursuits. The first involves the intellectual motive involving activities such as learning, exploring, discovering and may involve thoughtfulness and imagination. The second is the social motive, which relate to and involves the need for friendship and interpersonal relations. The third is the competence-mastery motive which

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1.4.1 Survey instrument design considerations

The first dimension is to seek information on satisfaction levels reached across a range factors deemed pertinent to the individual with respect to the activity, such as a visit to a museum. One aspect that needs to be considered is that there are instrumental (maintenance factors) and expressive indicators (core experiences or benefits) of satisfaction (Noe 1987; Czepiel and Rosenberg 1974). This can be measured using a numerical scale. In this study the level of satisfaction across a number factors was measured using a 6-point scale (with 6 being Very High and 1 being Very Low).

In the literature, any attempts to measure opinions or attitudes typically utilise either a 5-point or a 7-point scale, which provides a mid-point with equal number of options on either side. The purpose of selecting a 6-point scale was the desire to present a continuum so that a benchmarking decision system could be developed. Often in a Likert-type scale mid-points can represent "unsure" and would be mathematically unusable for benchmarking purposes unless the cases in the mid-point were ignored from the analysis. That is not to say that these cases are unusable or meaningless, because they may possess "hidden" or underlying meaning, especially in relation to what respondents may not be saying.

The second dimension is to seek information, opinions and attitudes on "performance", as suggested by the literature discussed in the previous section. In order to collect relevant information on "performance" one needs to understand the nature and characteristics of the

industry (if relevant) and more specially, the missions and objectives of the enterprise. This will identify the issues that the research must address if visitor satisfaction is to be meaningfully measured. Consequently, the visitors were asked to indicate their level of agreement or disagreement to twenty items (statements) using a 5-point Likert scale (5 = Agree Strongly to 1 = Disagree Strongly). These items were selected based on the typical objectives that the organisation was deemed to be pursuing, using the literature and publicly available information.

1.4.2 The choice of scales

In the questionnaire design stage careful consideration was given to the choice of scales as well as the choice of the number of categories. One in important and overriding consideration was that visitors would complete the voluntary survey at the end of their visit may face time pressures. The number of categories in the scale and the number of items that needed to be addressed had to be carefully balanced with time taken to respond. Therefore, it was considered that 7 – point scales would unnecessarily increase the complicity and discourage thoughtful response. The number of items was limited to the minimum that would be required to address the performance objectives.

The measurement used to address the satisfaction level was a 6 – point forced scale, so that there was no mid-point which could be used to give a neutral or no opinion category. As explained above, this was done more for operational reasons with a view to using the data to develop decision benchmarks. One weakness of this approach is that in cases where the respondent had not formed an opinion about the item they would still be forced to take a position on the item. There is, in such cases, always an option for the respondent not to respond to the particular item, and would be registered as a "missing value."
Visitor Satisfaction was measured using an on-site survey and data was collected using a Visitor Survey questionnaire, which is attached in Appendix 1. The questionnaire included questions relating to:

- Attractions visited during the visit
- Expectations and satisfaction achieved
- Time spent
- Information sources used
- Use of services and facilities

- Visitor groupings
- Likelihood of revisiting and recommending
- Visitor profiles and comments

The survey consisted mostly of questions requiring a yes/no answer and some questions, using Likert scale statements, measuring satisfaction and attitude toward Sovereign Hill features. In addition, visitors were given the opportunity to suggest improvement that could be made.

1.4.3 Data collection

The data collection, using the self administered survey forms was conducted over six months, incorporating weekends, holiday periods and week days. Post boxes were placed at the exit point to deposit the completed forms and blank forms were readily available at the entry point. Data collection, using self-completion survey forms, took place on the grounds of Sovereign Hill from during 2009 covering peak as well regular visitation times. Data collectors were on-site to provide information about the study and to assist respondents with completion of the survey, if required. A box was placed at the exit to deposit the completed forms. A useable sample of 436 visitors was obtained.

1.5 Organisation of Report

Section 2 will present a review of the literature starting with leisure travel experience and the expectation formation process. The influence of price on consumer preferences will be discussed and issues relating to visitor satisfaction and causes of dissatisfaction will be examined.

Section 3 will present the detailed analysis of the data and the findings of the study. This section will outline the profile of the respondents in the study. This is important as it provides an overview of the composition of the sample and enables the dissection of the data to understand how various segments may vary in the views expressed. In this section the country of origin of visitors, their gender and age groups and whether it was their first visit to the destination will be discussed. Where significant differences in the views expressed based on these characteristics emerge, these will be discussed in later sections.

Section 3 will contain an analysis of the pre-visit variables and will discuss the levels of awareness, the major influences on the decision to visit and sources of information respondents used to find out about this tourist destination. It will also include awareness of cost involved prior to the visit and the degree of visit planning that was involved. This section will discuss any expectations visitors had formulated prior to the visit and were appropriate outline propositions relating to satisfaction level that that arise from the initial analysis and the literature review undertaken.

Section 3 will also contain the detailed analysis of satisfaction and dissatisfaction levels experienced with an emphasis on "value for money" and a profiling of those visitors who experienced price dissatisfaction. This section will include advanced statistical analysis to identify factor groupings in relation to enjoyment and satisfaction.

Section 4 will discuss conclusions in relation to the role of awareness and costs on satisfactions and areas of dissatisfaction experienced. This section will include post-visit factors such as the willingness to recommend to others, which is an important visit trigger in the tourism sector.

2.0   Literature Review

The ability to assess or judge customers' satisfaction levels is the critical first step towards customer retention and long-term competitiveness (Bowen and Clark, 2002). In the tourism market the focus is more on the retention of a customer base so that visitors will return and recommend to others. If this is to be encouraged, the satisfaction delivered must remain at a high level through quality assurance and value-adding strategies. The shifting consumer needs have to be analysed and understood on a continuous basis as these will impact on the importance placed on various product attributes (Gursoy and McCleary, 2004).

The products and services offered at a destination can be evaluated in terms of their value-adding capacity by understanding and measuring customer satisfaction (Noe and Uysal 1997, Bramwell 1998, Schofield 2000). It is important to make some assessment of visitor satisfaction if managers are to improve services and continue o remain relevant and effective (Fornell 1992).

2.1 Leisure travel experience and the expectation formation process

The leisure travel experience has been classified into five interdependent stages along a continuum: anticipation, travel to the destination, experience at the destination, return travel and the recounting of the memories of the experience (Steward and Hall, 1992, Stewart, 1998; Borrie and Roggenbuck, 2001). The initial phase of anticipation incorporates the pre-trip expectation on which destination choices are made (Williams, 1989). An important part of this stage is the planning of the future leisure experience, which includes information gathering. There is also an emotional dimension to anticipation and these emotions are important antecedents in decision-making processes (Perugini and Bagozzi, 2001). Personal recommendations from friends, relatives and acquaintances is an important input in tourism decisions-making, as are other external information sources like advertising and the internet. In the disconfirmation of expectation theory, expectations are formulated pre-visit. Patrick and Beckman (2002) identify the importance of the tourist's information satisfaction as an ingredient of overall satisfaction. Based on the information from various sources and

reconciling these with personal needs and constraints, the tourist selects a destination. Anticipation is more relevant in first visits and there is greater reliance on information sources to form expectations. This is generally not the case with subsequent visits to the same destination, in which case the prior experience is far more important.

In the case of most goods and services markets, loyalty and repeat purchase appears to be a central goal but in tourism markets this is not a priority. There is normally a considerable time span between visitors returning to a particular destination so loyalty is less significant. However, tourist satisfaction is a direct antecedent of the willingness to recommend the destination to friends and relatives (Bigne, 2001). Satisfaction with a visit will result in positive word of mouth and as de Rojas and Camarero (2006) found the higher the level of customer satisfaction the greater the willingness to recommend the visit to others. Satisfied visitors also tend to intensify their experience during the visit so that their stay would be longer and they would purchase more items of souvenirs (Kim and Littrell 1999; Bigne and Andreu 2004).

In a study of museum visitors, Huo and Miller (2007), found that there is a strong relationship between satisfaction and intention to recommend. They also indicate that the services rendered by museum staff plays a major role in increasing the level of satisfaction and a visitor's willingness to recommend to others. Traditionally museums have tended not to be customer focussed but placed emphasis on the management of their collections. Visitors to cultural facilities such as museums and art galleries tend to rely more on personal recommendations (Harrison and Shaw 2004). Visitor evaluation of such a service does not exclusively occur at the end of the service but during it in incremental steps (Harrison and Shaw 2004).

Most tourism models investigating satisfaction tend to rely on positivist approaches in which the tourist is considered a rational being that evaluates the adequacy of tourism products and services based on a mental cost-benefit comparison. A trip is taken with certain expectations and evaluation is based on the degree to which these expectations are met, not met or exceeded. This disconfirmation paradigm has been widely used in tourism research. In a 'vacation tourist behaviour model' developed by Moutinho (1987) it is claimed that there are three stages in the tourist decision process: pre-purchase influences and decision-making, post-purchase evaluation and future decision-making. The identification of these clearly

defined stages may be an over-simplification and does not apply in case of many tourism products. Tourism products like museums could be regarded as requiring high involvement participation on the part of the visitor and the 'journey' through a museum is itself an evaluation process. The tourist may be either satisfied or dissatisfied at the end of it and this is not necessarily through a mental calculation of cost-benefits at the end.

2.2 Customer Value - Influence of price on customer perceptions

Much of the customer satisfaction research neglects the role that price plays in determining value perceptions and satisfaction (Huber et al, 2001). Price of a product or service is a function of the product's or service's quality attribute and sends an important signal about the service. Voss, Parasuraman and Grewal (1998) contend that if performance is inconsistent with price charged, then expectation will have no effect on either performance or satisfaction judgments. There is also a stream of research that believes that consumers generally have a reference price points in memory for a good or service, that may be based on the last price paid, the price most frequently paid or the average of all the prices that have been paid for similar offerings (Zeithaml and Bitner, 1996, p. 486). This internal reference price acts as a standard against which newly encountered prices are compared (Oh, 2003).

Gale (1994) suggests that organisational strategies should be reoriented to focus more on delivering superior customer value which incorporates both the costs and benefits of staying with the firm. Zeithaml (1988, p. 14) defines customer value as "the consumer's overall assessment of the utility of the product based on perceptions of what is received and what is given." This exchange forms the basis on which consumers make assessment of the overall benefits of the product or service and does not only include price-quality comparisons but also incorporates value judgements. Monroe (1990, p. 46) defines value as trade-off between quality or benefits consumers perceived in a product or service relative to the sacrifice they perceive in paying the price, plus other acquisitions costs such as time and risks. Within the exchange context individual value judgements are mainly subjective and often exhibit emotional evaluations as well. From an individual consumer's standpoint the exchange process has a 'give' component which is the price paid or sacrifices made and a 'take' component which is benefit and quality experience derived (Thaler, 1985). Consumers do 'mental accounting' in the 'give and take' process but their overall judgement of value would

also be influenced by non-price extrinsic cues such as advertising messages and brand image (Dobbs et al, 1991, Zeithaml, 1988).

One would conclude from this that value is the perceived service quality relative to price. Value can be understood as a quality/price ratio which manifests itself in 'value for money' but it could also be understood as a price/performance ratio (Christopher, 1996). Customers value has also been conceptualised as a utility function where positive utility is represented by the quality-benefits of the offering and the negative utility is represented by price and other sacrifices, where the aim is to maximise the net utility (Lovelock, 1991). Service quality will have an influence on value perceptions, which is an antecedent of service satisfaction. Consumer evaluation of service involves the whole transaction (Anderson and Fornell, 1994; Johnson, 1997; Karmakura et al, 2002) therefore it is important to determine value from a process perspective (Gronroos, 1993). This discussion indicates that price is only included in terms of 'perceived value' construct and is usually measured by the two items 'price given quality' and 'quality given price (Anderson and Fornell, 2000; Siems et al, 2008). Varki and Colgate (2001) argue that quality is an intrinsic cue which is comparatively difficult to evaluate and that price, on the other hand, is an intrinsic cue that can be observed and compared, making it a stronger determinant of perceived value. In the study of the overall satisfaction in various industries Fornell et al (1996) found that price played an important role. Similarly in a study of the role of price in the service industries, Voss et al (1998) found that perceived performance has a stronger impact on satisfaction when there is price performance consistency but that price has a greater impact when there is a price performance inconsistency.

Varki and Colgate (2001) argue that in addition to making quality improvements service managers should improve value perceptions by managing the price perceptions of their customers. Their study found that price perceptions have an important influence on the customer's value perceptions and overall customer satisfaction, where poor price perceptions increase the likelihood of switching and the likelihood of recommending to others. Lovelock and Wirth (2003) proposes a simple equation that value equals benefits minus costs. Organisational strategies that seek to enhance customer value would need to increase the benefits with the same cost structure so that price to the customer remains the same. Siems et al (2008) show that there are a lot of price perceptions such as price emotions, price evaluations and price knowledge. They demonstrate that by including price perceptions in

customer satisfaction measurement one is likely to expose additional problems and solutions. In their study of zoo visitors they found that many visitors did not have prior knowledge of entrance prices and assumed that the price would be lower than it actually was. They display displeasure when confronted with the actual price and this reduced their satisfaction level.

Matzler et al (2006) found that the relative importance of service dimensions for "overall service satisfaction" differ from their importance for price satisfaction, suggesting that customers use different cues when evaluating overall service and price. In the tourism sector there is generally reliance on both domestic and international markets making it important to address cultural differences in price-value perceptions. The challenge in pricing for overseas tourist is complex, but where there is reliance on these markets it is important to consider differences in evaluative criteria. The failure of services to meet expectations based on the price paid may lead consumers to attribute their dissatisfaction to others or themselves because consumers believe that they are, at least in part, responsible for their dissatisfaction. This applies more to services than products, which at least can be returned as they often carry warranties (Zeithaml and Bitner 2003).

Bolton and Lemon (1999) found that there was a strong relationship customers' assessment of payment equity and satisfaction, such that the customers evaluate the exchange as more satisfactory when payments are lower than expected or budgeted. They suggest that customers evaluate the fairness of the exchange of inputs (price) and outcomes (service performance). Customers will seek to maintain payment equity in service relationships and will adjust items under their control, such as usage levels, in response to changes made by the firm, such as price changes and perceived changes in service quality. The customer is motivated by the need to budget and control expenditure which results in price having a direct influence on usage such that higher price is associated with lower usage. Consequently, managers should include measures of the fairness of the exchange relationship in customer satisfaction research.

The determination of causal inference can be explained by the three-dimensional framework to explain why a product does not perform to expectation– locus, controllability and stability.

The locus dimension relates to the responsibility for the failure, which could either rest with the consumer or the firm. The controllability dimension relates to the degree of power that the

consumer or the firm has in their ability to control the situation. This includes price asked by the firm and the consumer is willing to pay. The stability dimension relates to the indictors that such conditions will persist in the future (Oliver 1997; Weiner 1985).

The organisation has a critical role in providing the customer with exchange value and in ensuring that appropriate expectations are formed. The role of the organisation is not merely to design and deliver service to the customer, but to manage the value delivered to optimise satisfaction levels. Expectations play an important role in the determination of satisfaction, as we have seen from the earlier sections, therefore the management of the expectation formation is also a critical function of management. The role of management and the various strategies for identifying expectation-perception gaps will be analysed in the following section.

> *Proposition 1: That level of satisfaction reported will be influenced negatively if price dissatisfaction is experienced.*

2.3 Role of awareness in expectation formation

The type of product category under consideration would have an effect on how performance expectation influences satisfaction (Churchill and Surprenant 1982). If actual performance is close to expectation, then the level of satisfaction experienced will positively influenced by those expectations. However, if actual performance is sufficiently different from prepurchase expectations , then this expectation will have either no effect or a negative effect on subsequent judgement (Sherif and Hovland 1961). In a study of the interrelationships between the psychological variables of the tourist satisfaction process found that the important dimensions of the process consist of attitudes and prior beliefs, post-experience assessments and behaviourial intentions. This study contends that image image influences expectations and loyalty, such that a favourable preconceived image of the destination will have a positive effect on the individual's belief of a future experience. Consequently, the destination will be an important part of the individual's evoked choice set. Furthermore, Bosque and Martin (2008) find expectations to have a significantly positive influence on satisfaction and that disconfirmation does not.

In relation to destination awareness and visit planning, image often has an important role to play. According to Gronroos (1990) image is an expectations communicator. Image is an expectation-generating factor of a future encounter with the tourist service (Bosque et al 2006). The mental representation that visitors formulate about a destination assists the individual to anticipate their experiences (Jenkins 1999). Images mold the expectations people have formed before the visit (Bigne, Sanchez and Sanchez 2001). Image influences customers' expectations, which in turn play a decisive role in service quality and customer satisfaction (Castro et al 2007; Andreassen and Lindestad 1998; Bigne et al 2001). Image is created through communications and the past experiences of the customer (Mansfield 1992). The tourism image and quality variables associated with a destination impact on both returning intentions as well as recommending intentions of the visitor (Yoon and Uysal 2005).

In discussing the needs of disable tourists, Eichhorn, Miller, Michopoulou and Buhalis (2008) raise the notion of customer information satisfaction as a distinct subset of satisfaction. They argue that in order to improve customer information satisfaction service providers should develop communication sources that explicitly target individual expectations in the pre-purchase search stages. In the tourism industry the overall satisfaction is derived from not only from attribute satisfaction but also information satisfaction (Baker and Crompton 2000; Tian-Cole and Crompton 2003).

Hill, Woodland and Gough (2007) in a study of visitor satisfaction in tropical rainforests found that visitors who used information sheets in their journey rated the sense of rainforest history significantly higher than visitors without information. They argue that visitors that used information sheets received a more holistic experience. The provision of adequate and relevant information to visitors stimulates the move from a 'looking' to a 'learning environment (Hennes and Chabay 2001). Visitors may seek out what type of experiences to expect at a particular destination before the visit (especially overseas visitors). Travellers therefore need aesthetic as well as functional information (Vogt, Fesenmaiser and Mackay 1993).

There are a range of cues and sources of information that consumers use to formulate expectations. These include word of mouth communications and referrals, prior experience

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with similar situations and marketing communications (Oliver 1996; Boulding et al 1993; Ziethaml et al 1990). In whatever ways that expectations are formed, it is the perception that consumers have about what should be on offer that will affect their experience and satisfaction (Parasuraman et al. 1988, p.16).

Spreng, Dixon and Olshavsky (1993) argue that prepurchase expectations are a function of both price and quality information. They believe that satisfaction is a function of price, performance, and expectation. Voss, Parasuraman and Grewal (1998), contend that if performance is inconsistent with price charged, then expectation will have no effect on either performance or satisfaction judgments.

2.4 Satisfaction and recommending behaviour

Views on how satisfaction should be measured vary. Customer satisfaction can be estimated with a single item, which measures the overall satisfaction according to Fornell (1992), Spreng and Mackoy (1996) and Bigne et al (2001). On the other hand, the degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes (Mai and Ness 2006). Yoon and Uysal (2005) stress that satisfaction is multi-dimensional and therefore any attempt to measure it must consider a range of variables. In the light of these views, this study attempts to satisfaction using a number of measures, including an overall satisfaction indicator and indicators of satisfaction with various product and service attributes. There is also emphasis placed on understanding awareness levels and expectations (previous section) as these affect visitor experience. The tourist's satisfaction with a holiday destination is shaped by their expectations and their experiences at the destination (Chon 1989).

There seems to be a lot of evidence to support the view that high levels of satisfaction imply positive future behaviour towards the organization supplying the service   (Bolton and Drew 1991, Fornell 1992, Taylor 1997). Service quality and tourist satisfaction are significant determinants of the intention to revisit the destination or to recommend to friends and relatives (Castro et al 2007, Bigne et al. 2001). Hui, Wan and Ho (2006) found the likelihood of tourist recommending a destination was positively related to their overall level of satisfaction. Brand image is a more affective and less cognitive based perception. Once a given level of satisfaction is attained it is more the emotional perception of the brand image

that drives loyalty and influences customers' intention to recommend to others and to revisit themselves (Faullant, Matzler, and Fuller 2008). Huo and Miller (2007) in their study of a museum found that services rendered by staff plays a major role in enhancing the level of satisfaction and a visitor's willingness to recommend a museum to others.

In a review of preceding research on the customers' future intentions, Zeithaml et al *(1996) concluded that there were four major categories: referrals, price sensitivity, repurchase, and complaining behaviour. Hui, Wan and Ho (2006) found the likelihood of tourist recommending a destination was positively related to their overall level of satisfaction. The higher the level of satisfaction the greater the likelihood that repeat purchase , and advocacy of the organisation's products would occur compared to when someone is less satisfied (Heskett, Sasser, and Schlesinger 1997). Cultural facilities, such as museums and art galleries have traditionally relied on word-of-mouth communication rather than other means of promotion is because it has proved most effective. The best way to generate recommending behaviour is satisfied customers. This shift to market orientation is a turning point in an industry that has given little prominence to the meeting of need of the customers. Traditionally, museums have focused primarily on the care of their collections (product orientation) and lost market opportunities (Harrison and Shaw 2004). Castro et al (2007) and Bigne et al (2001) argue that service quality and tourist satisfaction are significant determinants of the intention to revisit the destination or to recommend to friends and relatives.

> *Proposition 2: That price dissatisfaction impacts negatively on willingness to recommend*

> *Proposition 3: That non-for-profit status influences satisfaction levels experienced.*

> *Proposition 4: That new visitors would be more likely to have a longer trip planning horizon.*

The following sections will present the findings from the study in relation to the range of sources of information used, the general awareness of the destination offerings, visitors' expectations and visit planning. The theoretical framework suggests that expectations are

critical to the determination of satisfaction and are likely to impact on the visitor experiences and post-visit outcomes.

3.0   Analysis and Findings

3.1 Profile of visitors in the study

3.1.1   Where did the visitors come from?

Sovereign Hill attracts a large number of international visitors, who are either part of a packaged tour or are visiting friends and relatives (VFR) market. The study found that 22% of the respondents were from overseas and 78% were domestic visitors. The fact that 39% of the domestic visitors stayed away overnight indicates that a large proportion of Sovereign Hill visitors were holidaying in the region, and 61% were day trippers.
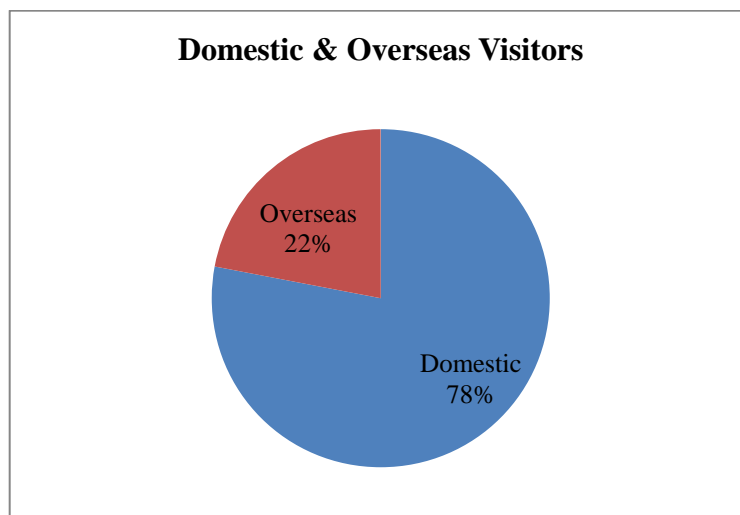

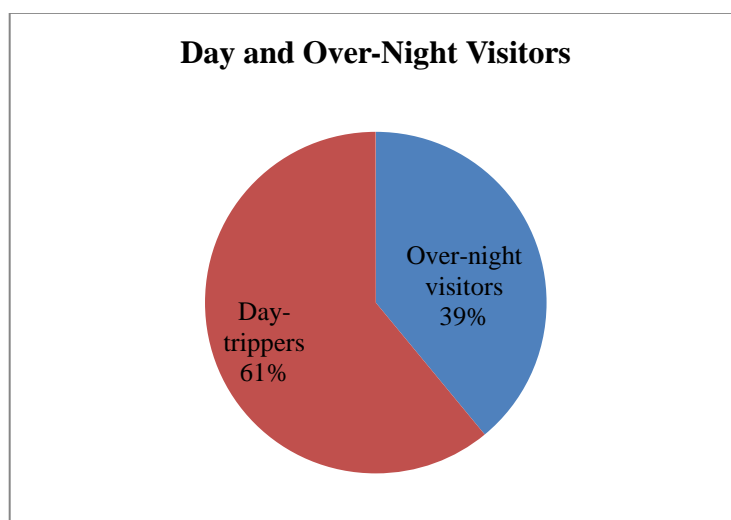Figure 3.1: Domestic and overseas – Origin of visitors

Figure 3.2: overnight stayers and day-trippers

Table 3.1: Origin of overseas visitors

Origin of Overseas Visitors	Numbers
UK and Europe	14
New Zealand	13
India	12
Other Asia	11
China and Hong Kong	9
Malaysia	9
Other countries	10
No response (country unspecified)	16
Total	**94**

Three quarters of the domestic visitors were Victorians (75%) and the remaining 25% were from other States. It is interesting to note that there were fewer interstate visitors than there were overseas visitors. This may be a result of declining domestic tourism experienced over recent years, as cheaper international travel has provided a greater variety of options for tourists.

3.1.2 Demographic profile: age and gender

The study sample included 53% female and 47% males, giving a good distribution to examine any gender differences in view and attitudes, as well as the levels of satisfaction experienced. Furthermore, the sample attained a good distribution in the various age groups as shown in Table 3.2.

Table 3.2: Age Categories

Age Categories	Number	Percentage
Under 20	15	3.8
20 - 24	57	14.5
25 - 29	62	15.8
30 - 34	45	11.5
35 - 39	52	13.3
40 - 44	49	12.5
45 - 49	43	11.0
50 - 54	24	6.1
55 - 59	19	4.8
60 and over	26	6.6

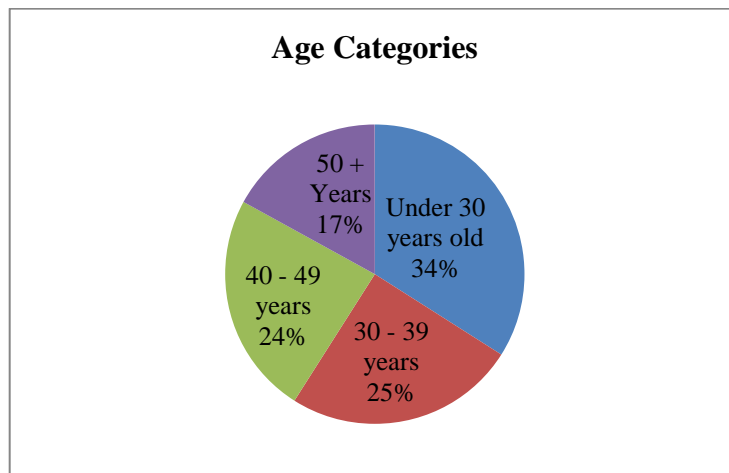| Total	392	100.0

Figure 3.3: Age Groups of respondents

Approximately a third of the respondents (34%) were under the age of 30 indicating that the attractions at Sovereign Hill appeal to the younger population. There were almost equal number in their thirties (25%) and their forties (24%). The over 50 age category accounted for 17.5% of the visitors. The size of these groups provides us with a rich set of data enabling analysis by these categories to be covered later in this report.

3.1.3   Background to visit: first visit and repeat visits

As with all businesses, the tourism enterprises rely heavily on repeat visits and the frequency of visits is also critical to a sustainable operation in an overall small market. The study found that 40% of respondents were repeat visitors and 60% were first time visitors, as shown in Table 3.3

Table 3.3: Repeat Visits

	Number	Percentage
First time visitors	253	60%
Repeat visitors	171	40%
Total	424	100%

As one would expect for the majority of the non-Victorian visitors this was their first trip, however, in the case of Victorian visitors, 56% had visited previously. While the majority of

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interstate visitors were staying away overnight, as one would expect, only 25% of the Victorian visitors were staying away overnight, most of which came from country rather than metropolitan Victoria.

It is interesting to note that there was a significant statistical difference in revisits with regard to various age categories, in that the young were most likely to be re-visitors (X2 (26.64, 10) p=.003). The majority (73%) of those under the age of 20 years had visited previously and a larger proportion (58%) of those in the 50 to 54 age group had visited previously. Repeat visits amongst the older population became lower as the age progressed, indicating that there may be some potential to encourage revisits in this age group. The 30 – 39 and the over 50 age groups were less likely to revisit.

When was the last visit?

Respondents who had visited previously were asked when their previous visit was. As shown in Table 3.4, 40% of visitors return within 3 years and 72% return within 10 years, indicating revisits comprise an important segment and presents implications for product renewal. As indicated earlier, 56% of the Victorian visitors has visited previously, and may be returning to show the sites to visiting friends and relatives.

Table 3.4: Time since last visit

Time since last visit	Percentage
Within the last three years	40%
4 to 6 years ago	16%
7 to 10 years ago	16%
11 to 20 years ago	15%
More than 20 years ago	13%
	N=152

 Only 7% of the respondents were on a packaged tour. It should be noted that many on a packaged tour find themselves on a strict timetable and are normally unlikely to present as survey respondents.

3.2 Awareness, visit planning and visitor expectations

For the new or first time visitors, "friends and acquaintances" and "relatives" were by far the most important source of awareness raising information, with 42.2% of them hearing about Sovereign Hill from friends and acquaintances and nearly 30% of them hearing from relatives. These sources were also critical for repeat visitors, indicating the power of positive word-of-mouth. While these were high in the case of both new and repeat visitors, the importance of these sources were statistically significant in that new visitors relied more heavily on these sources of information.

Table 3.5: Sources of information used by visitors

Source of information about Sovereign Hill (awareness trigger)	All visitors	First time visitors	Repeat visitors
Friends and acquaintances	**34.7%**	**42.2**	**24.0**
Relatives	**23.0%**	**29.9**	**13.2**
Previous visit	24.5%	0	58.7
Local knowledge	19.0%	13.1	26.9
Internet	**17.1%**	**17.5**	**16.2**
Guide Books eg motoring guide books	11.5%	10.4	13.2
Media	10.5%	9.2	12.6
Brochures	9.5%	10.4	8.4
Tourist Information Centre	6.9%	4.0	10.8
Tour Agent	5.0%	5.2	4.8
Road Signs	4.0%	2.8	6.0

The internet is increasingly becoming an important non-personal source of information for visitors about tourist destinations because of the easy with which important decision making information can be sourced. In total over 17% relied on this source if information and the internet were used almost equally by new and repeat visitors.

3.2.1 Cost Awareness

Respondents were asked if they were aware of the entry cost involved prior to their visit. Only 55 % of visitors were aware of the entry costs prior to their visit. This information is available on the internet site for this destination. Off those respondents that were not aware of the cost involved prior to their visit, 71% were new visitors and 29% were repeat visitors. Cost awareness was lower for the new visitors compared with repeat visitors and this difference was statistically significant.

Who was unaware of price prior to visit?

Repeat visitors 26%
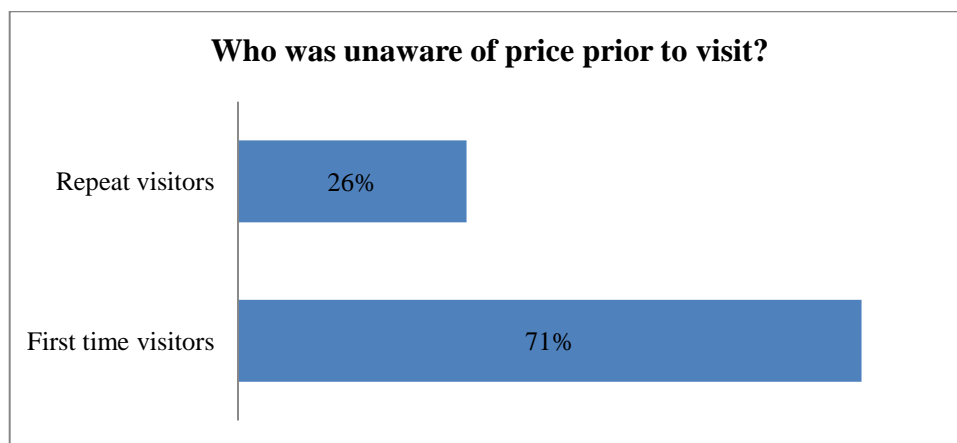
First time visitors 71%

Figure 3.4: Price awareness pre-visit.

In addition, about a third of the visitors were somewhat deterred by the high entry price. One of the proposition to be examined by this study is that price would adversely influence satisfaction level experienced by the visitors. This will be discussed in section 4 of this report. Conversely, in the case of the 66% of the respondents that were not deterred by the cost we would not expect their satisfaction level to be influenced by the high entry charge.

3.2.2 Awareness about not-for-profit status of Sovereign Hill

Only 21% of visitors were aware that Sovereign Hill is a non-for-profit organisation and the numbers were evenly distributed between new and repeat visitors.

3.2.3 Visit Planning

It would be expected that new visitors would most likely plan the trip and that repeat visitors would perhaps be less likely to do the same extent of planning. However, 64% of new visitors decided on the day compared to 36% of repeat visitors. On the other hand, a month

long planning horizon applies in the case of 25% of new visitors compared to 35% of repeat visitors. This may indicate that some of the repeat visitors may be planning to bring visiting friends and relatives. Generally the table indicates that new visitors appear to have a smaller planning horizon than repeat visitors. The total column indicates that nearly 60% of visitors either decide on the day or within a week of the visit.

Table 3.6: Trip planning horizon

Trip Planning: when decided to visit?	New visitors	Repeat visitors	Total
Decided today	44 (18.2%)	25 (15.3%)	69 (17.0%)
In the last week	108 (44.6%)	65 (39.9%)	173 (42.7%)
In the last month	60 (24.8%)	57 (35.0%)	117 (28.9%)
In the last year	30 (12.4%)	16 (9.8%)	46 (11.4%)
Total	242 (100%)	163 (100%)	405 (100%)

3.3 Visitor Satisfaction and Dissatisfaction

This section will undertake a detailed analysis of the levels of satisfaction reported by the visitors. The analysis will commence with the assessment of satisfaction experienced by the visitors and will be followed by an evaluation of the degree of dissatisfaction or displease visitors reported about their visit. This section will provide a deeper understanding of what the various aspects of the service performance and service elements are that may result is positive and negative feelings.

3.3.1 Satisfaction Experienced

Table 3.7 evaluated the levels of satisfaction visitors reported in relation to service and product elements and the overall satisfaction levels achieved.

Visitors were generally very satisfied with the visit recording an overall satisfaction mean score of 5.02 out of a maximum 6, with a standard deviation of less than one, indicating that the majority felt the same way about their visit. Visitors were particularly pleased with:

General environment and atmosphere (5.23)

The way things are presented and displayed (5.23)

The knowledge & accessibility of staff (5.14) and

The learning and educational focus (5.09)

Table 3.7: Level of satisfaction

Satisfaction items*	Mean Score*	Standard deviation	Skewness
General environment and atmosphere	5.23	.785	-.908
The way things are presented and displayed	5.23	.857	-1.150
The ease with which you could get more information & advice	4.90	1.076	-1.072
The clarity of signage and labelling that made finding things easier	4.97	1.007	-1.070
The knowledge & accessibility of staff	5.14	1.022	-1.597
Value for money	4.55	1.300	-.777
The range of things to do	4.86	1.111	-.988
The level of hygiene	4.81	1.129	-1.123
The learning and educational focus	5.09	.914	-.987
What is your overall satisfaction level with this visit?	5.02	.990	-1.125

* Items were rated on a six-point scale with 1being low satisfaction and 6 being high satisfaction

All of these items rated higher than the overall satisfaction (5.02). This may indicate that these are being balanced against items with which visitors are less satisfied. Visitors were least satisfied with the following items:

Value for money (4.55)

The level of hygiene (4.81)

The range of things to do (4.86)

The ease with which you could get more information & advice (4.90)

The clarity of signage and labelling that made finding things easier (4.97)

Many visitors did not consider that their experience represented good value for money as this had the lowest mean score. It also had the highest standard deviation of 1.3 indicating that the distribution was rather flat and that there was some degree of unhappiness with the cost of the

visit, with about 20% of visitors indicating low satisfaction. In relation to the items were there was less satisfaction, there was also a greater variance in the responses, indicating that greater number of visitors rated these with a lower satisfaction score.

Generalised satisfaction scales (as the one discussed in the previous section) are not sufficient in themselves to determine how visitors may actually feel about a product, service or issue. In this study, in addition to satisfaction levels, visitors were asked to indicate their level of agreement or disagreement relating to "performance" items. The items were selected based on the literature review of studies relating to cultural centres and museums, among others. Table 3.8 presents the mean scores and standard deviations for the items. The measurement used a 5 point Likert scale (5 = Strongly Agree to 1 = Strongly Disagree). The data will be subjected to more advanced statistical analysis later in the report, but the purpose of the analysis below is to conduct a micro analysis so that we can understand disagreements rather than agreement or dissatisfaction rather than satisfaction.

The choice of these items was also guided by what management of such a tourism focussed enterprise may be interested in from an operational point of view. In line with the "value management" approach (diagram 1 above) the analysis below is organised around organisational goals and mission. For example, one of the goals is to provide visitors with an understanding the history of the period. This would be regarded as Sovereign Hill's core competency (Prahalad and Hamel 1990). To address this, respondents were asked to rate their level of agreement or disagreement for the statement: "I gained a better insight into the history of the region".

Visitors were asked to indicate their level of agreement or disagreement in relation to a range of statements about their experiences and the various products and services encountered. These are were measure using a five point Likert scale where 5 was "strongly agree" and 1 was "strongly disagree". Table xx presents the mean scores, the standard deviation and the degree of skewness in the data. The degree of skewness is negative, indicating that there was a tendency for respondents to rate the statements as agree or strongly agree.

Table 3.8   Visitor Ratings

Tick the most appropriate column that represents your rating of the following statements:	Mean Score	Standard Deviation	Skewness
Overall, this visit was very enjoyable	4.32	.702	-1.200
The place is well maintained and well organised	4.37	.713	-1.238
The displays and stands were informative	4.25	.751	-.912
The staff were knowledgeable and friendly	4.39	.746	-1.413
I have learnt a lot on this visit	4.09	.824	-.646
There should be **more** educational emphasis in displays	3.57	.993	-.328
The visit represented good value for money	3.71	1.025	-.556
I was impressed with a the variety of things to see	4.11	.788	-.802
This was an expensive day out	3.53	1.086	-.319
I expected that the visit would take longer than it did	3.13	1.077	.149
I would feel comfortable in recommending this place to others	4.27	.830	-1.365
I gained a better insight into the history of the region	4.22	.760	-1.085
The price of refreshments and other items were reasonable	3.56	1.037	-.547
There are a lot of things to see and do here	4.08	.846	-1.053
I found it a bit too 'touristy'	3.07	1.110	.156
There is too much to cover in one visit	3.16	1.062	.196
Toilets were easily accessible	4.02	.841	-.663
There were enough places to rest one's feet	3.78	.967	-.542
There was too much walking involved	2.96	1.130	.172
All things considered, the visit was a good experience	4.32	.795	-1.310

Factor analysis was conducted to reduce and groups these into factors using Principal Component extraction method. The rotation method used was Equamax with Kaiser Normalization and rotations converged in 5 iterations. The KMO and Bartlett's test results indicated that the Kaiser-Meyer-Olkin measure of sampling adequacy was .900 and the Barlett's test for sphericity was significant. This is shown in Table 3.9.

Table 3.9: KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.900
Bartlett's Test of Sphericity	Approx. Chi-Square	2491.181
	df	120
	Sig.	.000

Three factors extracted were 'experience and enjoyment', 'displeasures' and 'services' and the items that combine to make up these factors is presented in Table 3.10.

Table 3.10 presents the factor groupings:

FACTORS	F1	F2	F3
Experience and enjoyment			
Overall, this visit was very enjoyable	.845		
I would feel comfortable in recommending this place to others	.823		
The displays and stands were informative	.795		
I have learnt a lot on this visit	.780		
All things considered, the visit was a good experience	.776		
The place is well maintained and well organised	.760		
I was impressed with a the variety of things to see	.758		
I gained a better insight into the history of the region	.720		
The staff were knowledgeable and friendly	.674		

		F2	F3
Displeasures			
I expected that the visit would take longer than it did		.722	
I found it a bit too 'touristy'		.718	
There was too much walking involved		.696	
This was an expensive day out		.658	
There should be **more** educational emphasis in displays		.580	
Services			
Toilets were easily accessible			.822
There were enough places to rest one's feet			.821

In order to better understand how different demographics of visitors perceived the three factors, the items were used to generate corresponding variables . Further analysis indicated that 89.3% of visitors were positive about their experience and enjoyment and 10.7 % tended to remain indifferent. In relation to the items that signified some degree of displeasure, 34% of the visitors felt that the items were of concern, 12.5% did not feel that these were of concern at all and the majority 53.5% remained indifferent with respect to these items that brought some displeasure to some visitors. In relation to "services" or convenience facilities, 12.5% were somewhat dissatisfied with them, but the majority 79.6% were happy with what was provided.

Table 3.11: Visitor Responses to factors

	Agreement	Disagreement	Indifferent
Experience and enjoyment	89.3	0.5	10.2
Displeasures	34.0	12.5	53.5
Services	79.6	2.7	17.8

Detailed analysis did not indicate any significant difference in the views expressed by visitors of different gender, country of origin or whether they were first time visitors or repeat

visitors. In general, a greater number of those over the age of 50 years agreed that services were adequate and the younger tended to indifferent towards it. In relation to the 'displeasure' items, males were more likely to express displeasure, while females tended to remain indifferent or were not generally concerned about these issues. The gender differences with respect to the 'displeasure' factor was statistically significant with 60% of the males being concerned by them compared to only 40% of the females, ($\chi 2 = 11.6$, df = 2, p = .003).

In relation to the factor relating to experience and enjoyment, there was no significant different between first time visitors and repeat visitors. However, a greater number of first time visitors (12%) remained indifferent compared to only 6% of the repeat visitors.

3.3.2 Visitor Dissatisfaction

From the literature review it can be concluded that visitor satisfaction levels in leisure activities is generally skewed towards satisfaction and that people are relaxed and perhaps less critical. As the satisfaction scale above demonstrates based on mean scores and their standard deviation, the satisfaction levels of visitors to the venue were very high. The obvious managerial conclusion from the investigation of averages is that visitors are very satisfied and therefore, plans and programs are deemed to be performing to managerial expectations. A second level of analysis is required to uncover any gaps that may exist between visitor expectations and managerial expectations.

In order to evaluate performance it is important to undertake a measurement of satisfaction generally as well as with specific objective related indicators of "performance". These indicators should be based on the dimensions that may constitute satisfaction. Firstly, we need to assume that there will be a high level of satisfaction and turn our focus on understanding the non-positive end of the scale and create some operational benchmarks. It should be noted that this method may not be appropriate if sample size is small. The section below explains why satisfaction levels (scales), if used as a sole measure, can deliver an incomplete, if not misleading picture.

Table 3.12: Satisfaction – dissatisfaction with individual items

	Agreement %	Disagreement %	Indifferent %
Atmosphere & Service			
The place is well maintained and well organised	91.4	1.8	6.8
The displays and stands were informative	86.2	1.8	12.0
The staff were knowledgeable and friendly	90.5	2.1	7.4
Toilets were easily accessible	77.3	5.3	17.5
I found it a bit too 'touristy'	32.8	32.3	34.9
Learning			
I have learnt a lot on this visit	78.3	3.6	18.1
I gained a better insight into the history of the region	87.5	2.6	9.9
There should be **more (adequate)** educational emphasis in displays (reversed)	53.7	13.1	33.2
Value			
The visit represented good value for money	62.5	13.1	24.4
This was an expensive day out	52.4	17.3	30.3
The price of refreshments and other items were reasonable	58.2	15.8	26.0
Overwhelming			
There is too much to cover in one visit	36.2	30.3	33.5
There were enough places to rest one's feet	67.4	12.4	20.3
There was too much walking involved	32.0	38.4	29.6
Willingness to Recommend			
There are a lot of things to see and do here	80.2	3.2	16.6
I was impressed with a the variety of things to see	82.9	4.2	12.9
I expected that the visit would take longer than it did	34.0	29.5	36.5
I would feel comfortable in recommending this place to others	87.2	3.9	8.9
Overall Satisfaction			
Overall, this visit was very enjoyable	91.6	1.6	6.9
All things considered, the visit was a good experience	88.1	3.2	8.7

Measuring dissatisfaction is difficult because of the positive skewness of the tourism satisfaction survey data. However, an overall picture could be gleaned by examining responses to a range of variables presented in Table 3.12. The items have been grouped into six categories, each of which can be examined by compressing the five-point Likert scales into three representing agreement, disagreement and neutral. In many instances the "neutral" response can be an indicator of dissatisfaction as well and therefore should be examined closely. The groupings in Table 3.12 are discussed below:

3.3.2 (a)   Atmosphere & Service

While the majority (91.4%) of the respondents that the venue was well maintained and organised, there were 1.8% that did not believe this to be the case and a further 6.8% remained neutral. Respondents may remain neutral when expectations are met about maintenance or was within there "zone of tolerance". The important indicator is that in just over 8% of cases, respondents were not willing to rate this factor higher. In raw terms the study captured 37 visitors (out of total of 429 in the study) who were not 'delighted or excited' about the way the venue was maintained and organised. Only 86.2% found the displays and stands to be informative and 95.5% found the staff to be knowledgeable and friendly. There was a wide variety of views about the venue being too touristy, as many people agreed as disagreed.

3.3.2 (b)   Learning

Learning and education is an important function of Sovereign Hill as it shows life during the gold rush period and a key goal is to educate all segments of the market about life during this period. However, only 78% believed that they "learnt a lot", indicating that others may have come with prior knowledge or were on subsequent visits. This may account for the high 18.1% that remained indifferent or neutral. Similarly, 12.5% of respondents did not believe that they "gained a better insight into the history of the region". This indicated that there may be some scope of 'value adding' in these areas as a way to entice revisits. More than half the respondents agreed that "there should be **more** educational emphasis in displays."

3.3.2 (c)   Value

Only 62.5% of respondents believed that they had received "value for money" from this visit and most (52.4%) believed that "this was an expensive day out". Furthermore, 15.8% found the price of refreshments to be unreasonable. Value received cannot only be measured in financial terms, because enjoyment can occur even if one believes that the financial costs were high. The influence of "value" in leisure markets is more on the willingness to revisit

3.3.2 (d)   Overwhelming

Sometimes an experience can be overwhelming in that enjoyment levels can suffer because of various factors. For example 36% of visitors believed that there was too much to cover in one visit. Venues can be overwhelming when they create physical or emotional stress. Nearly a third of the respondents stated that there was too much walking involved.

3.3.2 (e)   The willingness to recommend.

The fact that 3.9% of visitors did not feel comfortable in recommending the venue to others and that 8.9% choose to remain neutral should be a cause for concern (12.8% in total). Most tourism attractions rely heavily on word-of-mouth and it is important to ensure that visitors feel comfortable in recommending the attraction to others and select the venue in future when they have visiting friends and relatives. Generally visitors must be impressed in some ways and feel a degree of 'delight' with the visit to generate positive word-of-mouth.

3.3.3   Profile of those dissatisfied with price – value received

There were 62.5% of visitors who believed that the visit represented "good value for money", with 13.1% claiming that the visit did not represent good value for money and the remaining 24.4% being indifferent or non-committal. On the other hand, 52.4% believed that this was an expensive day out, with 17.3% being pleased with the cost with respect to the value received. More detailed analysis was undertaken by combining these two variables in order to understand the segments that expressed some dissatisfaction with price and the degree to which this influenced their assessment of satisfaction with the visit.

Respondents who expressed dissatisfaction with price- value, comprised just over 20% of the visitors. However, first time visitors were more likely to express this view, but this feeling was no means limited to first time visitors. There was no significant difference between the domestic and overseas visitors. Those under the age of 40 years comprised two-thirds of those who were dissatisfied with the costs associated with the visit. There was no significant difference in the visit planning horizon of those who were satisfied or dissatisfied with the price. Despite the dissatisfaction with price, 82% reported positive overall satisfaction with the visit and 18% of those who were dissatisfied with price were also dissatisfied with the visit overall. Table 3.13 presents the various areas of dissatisfaction as expressed by who were displeased with the price.

Table 3.13: Price dissatisfied visitors – areas of concern

Satisfaction items*	Low satisfaction (%)
General environment and atmosphere	2.3
The way things are presented and displayed	7.0
The ease with which you could get more information & advice	18.9
The clarity of signage and labelling that made finding things easier	15.2
The knowledge & accessibility of staff	14.1
The range of things to do	26.8
The level of hygiene	20.3
The learning and educational focus	6.0
What is your overall satisfaction level with this visit?	18.1

Willingness to recommend:

Despite the dissatisfaction with price, 70% felt comfortable with giving positive recommendation and 30% reported that they would not be comfortable about recommending the destination to others.

Prior awareness of cost:

Off those who displayed dissatisfaction with price, 57% were unaware of costs involved with the visit and 63% were somewhat deterred when they initially encountered the pricing information at the entry point. Despite this, nearly 42% stated that they were likely to visit again within the next five years.

4.   Conclusions

Proposition 1: That level of satisfaction reported will be influenced negatively if price dissatisfaction is experienced.

The Sovereign Hill website is indicating an increasing number of 'hits', however it is unclear and the proportion of these that translate into visits is unknown. The study found that 55% were aware of the entry costs prior to their visit and this information is readily available on the website. As expected cost awareness was lower for first time visitors. Cost awareness was lower for the new visitors compared with repeat visitors and this difference was statistically significant.

About a third of the visitors were somewhat deterred by the high entry price. One of the proposition to be examined by this study is that price would adversely influence satisfaction level experienced by the visitors. Conversely, in the case of the 66% of the respondents that were not deterred by the cost we would not expect their satisfaction level to be influenced by the high entry charge.

Using factor analysis data reduction techniques it was discovered that off those who displayed dissatisfaction with price, 57% were unaware of costs involved with the visit and 63% were somewhat deterred when they initially encountered the pricing information at the entry point. Despite this, nearly 42% stated that they were likely to visit again within the next five years.

The study found that 63% of respondents believed that they received "value for money" from their visit and 52%) believed that "this was an expensive day out". Furthermore, 15.8% found the price of refreshments to be unreasonable. Value received cannot only be measured in financial terms, because enjoyment can occur even if one believes that the financial costs were high. The influence of "value" in leisure markets is more on the willingness to revisit and willingness to recommend the venue to others.

The price dissatisfied visitors were also more likely to express dissatisfaction with particular service elements. The key areas of dissatisfaction (for price-dissatisfied visitors) were with:

The range of things to do (27% were dissatisfied)

The level of hygiene (20% were dissatisfied)

The ease with which you could get information and advice (19% were dissatisfied)

The clarity of signage and labelling that made finding things easier (15% were dissatisfied)

The knowledge and accessibility of staff (14% were dissatisfied).

Those visitors who were dissatisfied with price were more likely to express dissatisfaction with their 'overall satisfaction" level, with 18% indication low satisfaction.   Those expressing price dissatisfaction tended to be under the age of 40 years.

Price dissatisfaction was an important contributor to 'displeasure' experienced from the visit. However, factor analysis groups other elements that cause 'displeasure'. These were found to include the feeling that the venue was 'too touristy', involved 'too much walking', lacked educational value and the expectation that 'the visit would take longer'. The last item may be an indication that visitors did not receive adequate time-value.

Proposition 2: That price dissatisfaction impacts negatively on willingness to recommend

Approximately 4% of visitors did not feel comfortable in recommending the venue to others and that 8.9% choose to remain neutral should be a cause for concern (12.8% in total). Most tourism attractions rely heavily on word-of-mouth and it is important to ensure that visitors feel comfortable in recommending the attraction to others and select the venue in future when they have visiting friends and relatives. Generally visitors must be impressed in some ways and feel a degree of 'delight' with the visit to generate positive word-of-mouth.

Separate data analysis was undertaken for those that were dissatisfied with price to evaluate the impact on their recommending behaviour. The study found that despite the dissatisfaction with price, 70% felt comfortable with giving positive recommendation and 30% reported that they would not be comfortable about recommending the destination to others. This indicates that those who are dissatisfied with price are less likely to recommend.

Proposition 3: That non-for-profit status influences satisfaction levels experienced.

Proposition 1, discussed above, examined the influence of price on satisfaction. I related matter is the not-for-profit status, which can influence the level of satisfaction reported.

The study found that a relatively small proportion of visitors in the study (21%) were aware that Sovereign Hill is a non-for-profit organisation and the numbers were evenly distributed between new and repeat visitors. This reduced the size of the sample to a level were this proposition could not be evaluated with any degree of confidence.

Proposition 4: That new visitors would be more likely to have a longer trip planning horizon.

It was expected that new visitors would most likely plan the trip and that repeat visitors would perhaps be less likely to do the same extent of planning. However, 64% of new visitors decided on the day compared to 36% of repeat visitors. In relation to 25% of new visitors, a month long planning horizon applied compared to 35% of repeat visitors. This may indicate that some of the repeat visitors may be planning to bring visiting friends and relatives. The study showed that new visitors had a smaller planning horizon than repeat visitors. The planning horizon in 60% of cases was between decision on the day of visit and one week. This is important from a marketing point of view, indication that visitation may increase after a period of active promotion of the venue.

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Appendices

Appendix 1: Questionnaire

Sovereign Hill: Visitor Survey 2009
**(The information provided here will be used for planning
and research purposes only and treated as confidential.)**

1.   Is this your first visit to Sovereign Hill
      Yes   No   →   In which year was the previous visit _____

2.   Are you part of a packaged tour   Yes   No

3.   Are you an overseas visitor   No   → What is your postcode _____
                                           Yes → Which country are you from _____

4.   Are you: Male   or   Female.

5.   **Age Group**:   18-24   25- 29   30-39   40-49   50-59   60+

6.   Did you stay overnight away from home when visiting Sovereign Hill   Yes   No

7.   In order to continually improve the services, could you please indicate your level of satisfaction
      with the facilities:

-SATISFACTION-

	Level of satisfaction with items below – Please circle the rating number that you think best applies to the items below:	**Very High 6**	**5**	**4**	**3**	**2**	**Very Low 1**
1	General environment and atmosphere	6	5	4	3	2	1
2	The way things are presented and displayed	6	5	4	3	2	1
3	The ease with which you could get more information & advice	6	5	4	3	2	1
4	The clarity of signage and labelling that made finding things easier	6	5	4	3	2	1
5	The knowledge & accessibility of staff	6	5	4	3	2	1
6	Value for money	6	5	4	3	2	1
7	The range of things to do	6	5	4	3	2	1
8	The level of hygiene	6	5	4	3	2	1
9	The learning and educational focus	6	5	4	3	2	1
10	What is your overall satisfaction level with this visit?	6	5	4	3	2	1

8.   Prior to the visit, how long do you expect to spend here _____(hours & minutes)
     Are you likely to complete the visit to your satisfaction within this time   Yes   No

9.   How did you hear about or find out about the Sovereign Hill? Tick all in the list that apply:

Tour Agents	Media (TV, Radio, etc)	**Please specify others below:**
Internet	Motoring Guide Books	
Brochures	Friends & Acquaintances	
Roadside Signs	Relatives	
Guide Books	Local Knowledge	
Previous visit	Tourist Information Centre	

     Which would you say were the most influential in your decision to come TODAY?

     _____   _____
     _____   _____

10. Could you please indicate your level of agreement or disagreement for the following statements:

	Tick the most appropriate column that represents your rating of the following statements:	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1	Overall, this visit was very enjoyable	5	4	3	2	1
2	The place is well maintained and well organised	5	4	3	2	1
3	The displays and stands were informative	5	4	3	2	1
4	The staff were knowledgeable and friendly	5	4	3	2	1
5	I have learnt a lot on this visit	5	4	3	2	1
6	There should be **more** educational emphasis in displays	5	4	3	2	1
7	The visit represented good value for money	5	4	3	2	1
8	I was impressed with a the variety of things to see	5	4	3	2	1
9	This was an expensive day out	5	4	3	2	1
10	I expected that the visit would take longer than it did	5	4	3	2	1
11	I would feel comfortable in recommending this place to others	5	4	3	2	1
12	I gained a better insight into the history of the region	5	4	3	2	1
13	The price of refreshments and other items were reasonable	5	4	3	2	1
14	There are a lot of things to see and do here	5	4	3	2	1
15	I found it a bit too 'touristy'	5	4	3	2	1
16	There is too much to cover in one visit	5	4	3	2	1
17	Toilets were easily accessible	5	4	3	2	1
18	There were enough places to rest one's feet	5	4	3	2	1
19	There was too much walking involved	5	4	3	2	1
20	All things considered, the visit was a good experience	5	4	3	2	1

11. Were you aware of the costs involved prior to your visit   ⊐ Yes   ⊐ No

     Did the cost involved deter you at any stage of your

     decision to visit   ⊓ Yes   ⊓ No

12. Are you likely to visit again in the next 5 years   ⊐ Yes   ⊐ No

     If "**No**" please state reasons _____

     _____

     Did you know that Sovereign Hill is a privately owned enterprise ⊏ Yes   ⊐ No

13. Could you please comment on your experiences from the visit and on the value for money: This will assist us in future planning of our programs and pricing.

_____

_____

_____

_____

_____

_____

_____ ☻ Thank you ☺

Thank you for your help in contributing to the future improvements of the services provided by the Sovereign Hill Museums Association. For a draw in the prize you should complete details below: (this will be confidential and not used for any other purpose).

…………………………………………………………………………………………………

Name:_____ Email:_____

Address*:_____

_____ Phone Contact:_____

(Full postal address – winner notified and prizes mailed).

DBA Research Project 2

Visitor Satisfaction Study

Brambuk

Indigenous Cultural Centre

Shameem Ali
University of Ballarat
January 2009

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CHAPTER 1: INTRODUCTION

1.1 History: Brambuk Cultural Centre

The original Brambuk Cultural Centre was constructed in 1990 at a cost of approximately $1 million, funded by the Victorian State Government. It was a culmination of nearly a decade of consultation between a committee of five Aboriginal communities from the western district and various tourism and government agencies. The Aboriginal (Koori) communities that were partners to this project included the Kirrae, the Whurang, the Goolum, the Gunditjmara and the Kerrup-Jmara, located in the South West Victoria and the Wimmera Regions.

The aim of the project was to foster a greater public appreciation of Aboriginal culture and heritage. Brambuk and Parks Victoria have jointly developed plans to create one visitor precinct in Halls Gap, Victoria that combines the former Grampians National Park Visitor Centre and the Brambuk Living Aboriginal Cultural Centre. Previously these were managed independently. The combined precinct aims to provide visitors and the community with a range of services including park information, educational programs, and an understanding and appreciation of the natural values and cultural heritage of the Grampians/Gariwerd region.

Gariwerd Enterprises which manages the Centre is a not-for-profit organisation made up from five Aboriginal communities from the Wimmera and Western district. Staff from the communities has provided a range of cultural experiences and services from the iconic Brambuk building. Over the last five years Parks Victoria and Brambuk worked towards the establishment of a partnership operation that would integrate many of the services provided on the site.

The original building is a two storey timber construction which included display area, workshop, a dreaming theatre and a shop. The Tourist Visitors Centre was nearby and housed the National Parks Information Service. The 2006 upgrade to the facilities involved the construction of a separate building located about fifty metres in front of the

original Centre. The new buildings house the Information Centre, display areas, the Shop and the Café.

1.2   Purpose of Report

This study was commissioned by the Sustainable Tourism Cooperative Research Centre (STCRC) to ascertain the degree and level of satisfaction experienced by the visitors to Brambuk , the National Park and Cultural Centre. The purpose of the study was to measure satisfaction level of visitors to the Centre after the construction of new facilities at the site. The new facilities were opened to the public in September 2006. The upgrade to the facilities included a Tourist Information Centre, a shop and a café. Brambuk, which is located in a separate building, was not part of this upgrade, yet forms an integral part of the facilities.

The study aims to provide a framework for continuous improvements so that programs can strive for greater relevance and be effective in meeting the needs and demands of a changing market. The focus of the study is on organisational objectives and the market based evaluation of the degree to which performance and quality standards are being met.

The research objectives were to identify the level of satisfaction experienced by Brambuk visitors and to measure the degree of satisfaction experienced with the services and facilities on offer at the Centre. It is important to make some assessment of visitor satisfaction if managers are to improve services and continue o remain relevant and effective (Fornell 1992). This study attempts to understand the gaps between visitor expectations and experiences and to measure satisfaction levels against operational objectives, programs and activities with a view to developing benchmarks that would signal the need for managerial action on operational objectives. The products and services offered at a destination can be evaluated in terms of their value-adding capacity by understanding and measuring customer satisfaction (Noe & Uysal 1997, Bramwell 1998, Schofield 2000.

1.3   Objectives of Study

The research objectives were to:

- identify the level of satisfaction experienced by Brambuk visitors
- measure the degree of satisfaction experienced with the services on offer
- identify gaps between expectation and experience
- measure visitor satisfaction against operational objectives and
- to develop benchmarks that would signal the need for managerial action on operational objectives.

1.4   Definitions

"Brambuk – the National Park and Cultural Centre" refers to the location which houses the original Brambuk Living Aboriginal Cultural Centre and the National Park Information Centre. In this report "Brambuk" will be used to refer to the original Brambuk Living Aboriginal Cultural Centre. The National Park Information Centre comprises the information service desk for tourists, a café, a shop and some internal and external displays. In this report the tourist information area will be referred to as "Information Services Centre" and the entire precinct will be referred to as the "Centre".

1.5   Organisation of this report

Section 2 will provide a summary of the relevant literature on customer satisfaction and the framework for this study. This will be followed by the explanation of the methodology used in this study. Section 4 contains the detailed analysis and findings and is divided into three distinct parts comprising visitor profile and product and service awareness levels (section 4.1), an analysis of the levels of satisfaction experienced by visitors in the study (section 4.2) and an analysis of the underlying expectation-satisfaction evaluated against organisational performance (section 4.3). Section 5 includes a summary of findings and conclusions.

CHAPTER 2: THEORETICAL FRAMEWORK AND DECISION MODELS

This section of the report contains a brief review of the literature on indigenous and cultural tourism to provide a context for this research. This is followed by a review of the various theories and models of customer satisfaction arising out of related disciplines of marketing and tourism. Such a review provides guidance for both the conduct of the data gathering phases of the research as well as providing a theoretical framework for the analysis of the data. The purpose of this section is to identify decision models that can link the findings of the research to the organisational mission and goals, with a view to change implementation. Furthermore, this section is designed to provide the theoretical grounding for the development of decision tools that can be used to operationalise the research outcomes and guide management decisions within a tourism setting.

2.1 Indigenous Culture and Tourism

Over the last decade or two there has been an increasing level of involvement of indigenous communities in the identification, development and operation of tourism enterprises (Anderson 1991; Altman & Finlayson 1993; Ryan & Huyton 2000; 2002). The involvement of indigenous people and communities in tourism within Australia is relatively new when compared with New Zealand and Canada. For the future growth of visitor demand and in the interest of continual renewal of offerings, visitor satisfaction and expectation studies provide a critical basis for future developments, marketing and targeting of new audiences (McIntosh 2004).

Research into Aboriginal tourism in the Northern Territory (Ryan & Huyton 2000) found that generally there was greater interest in nature rather than culturally based tourism, with Aboriginal cultural products ranking highest for about a third of visitors. Generally, respondents rated Aboriginal tourism products highly. Their study found that the respondents identified the key cultural products (in NT) to be 'authentic Aboriginal

souvenirs, Aboriginal music, dance performances, and rock art'.   The authors also report that with respect to overseas visitors, the tourist from North America and Northern Europe were most interested in Aboriginal tourism rather than those from the fast growing Asian tourist markets. Mohsin and Ryan (1999) and Blamey (1998) confirm the lower interest levels of Asian tourists in Aboriginal culture and heritage. Findings of studies on major motivation for visitors to New Zealand also do not flag Maori culture as being rated highly and classified it as a secondary influence on their decision to visit the country. However, the experiencing of Maori culture was mostly classified as an important and integral part of the total tourism experience (McIntosh 2004).

2.2   Satisfaction theories and models

Consumers develop expectations about a product before purchase, allowing them to compare actual performance with their original expectation. A positive confirmation (satisfaction) occurs when expectations are met or exceeded. If expectations are not confirmed by performance, adequate satisfaction levels may not be realised (Oliver 1980; Chon 1989). One way in which consumers make judgements about a product or service is by a process of benchmarking based on their past experiences. This is known as norm theory, whereby previous experience provides a benchmark for judging current and future experiences or consumptions (LaTour & Pear 1979; Sirgy 1984; Francken & van Raaij 1981). Equity theory is based on the exchange process, where cost is the measure of value expected, where cost incorporates price paid, as well as time and effort devoted (Fisk & Young 1985; Oliver & Swan 1989). This also includes opportunity cost, such that an activity or destination that results in dissatisfaction will incorporate the alternatives that were available as a part of the choice mix.

Tse and Wilton (1988) have put forward the performance model, which tends to give the greatest credence to the actual experience in the determination of satisfaction and discounts the role of prior expectation or previous experience. This may account for the fact that most visitor satisfaction surveys report results skewed towards positives levels of satisfaction. This focuses on the "bundle of benefits" that consumers experience and arise out of the sum of the benefits (pleasure, enjoyment, delight, surprise, etc) derived from the attributes of the product (service) offering. The thesis of the performance

model is that some control rests with the organisation making the offerings. There are instrumental and expressive indicators of satisfaction (Noe 1987), where expressive refers to the psychological or social benefit derived from participating in the activity (fishing, swimming) and instrumental refers to a desired end which may include service features like guides and facilities. These are controllable by management. Noe found that expressive indicators of satisfaction that related to core experiences were more important in explaining overall satisfaction. They truly contribute to satisfaction (Czepiel & Rosenberg 1974). On the other hand, instrumental factors are maintenance factors whose absence or failure to meet expectations would result in dissatisfaction. Instrumental and expressive attributes work in combination to produce overall satisfaction. Their contribution to satisfaction arises from emotional (expressive) and cognitive (instrumental) dimensions (Swan & Combs 1976, Uysal & Noe 2003).

The expressive attributes manifest as emotions and therefore, in a tourism or leisure situation especially, contribute to true satisfaction. The instrumental attributes, on the other hand, are more the vehicle via which a tourism experience is felt and are not cognitively oriented, such that their absence may create dissatisfaction. This has some parallels with Herzberg's motivator and hygiene factor theory where motivators are satisfiers resulting in satisfaction and hygiene factors are dissatisfiers resulting in dissatisfaction (Mullins 2001, Crompton 2003, Jensen 2004). Herzberg's theory can be used to explain the two dimensions of satisfaction. In discussing festivals, Crompton (2003) argues that the physical environment and infrastructure, including variables like parking spaces and the cleanliness of restrooms are potential dissatisfiers and must be distinguished from satisfiers, which are key attractions of the festival. These two dimensions are part of the same continuum and can coexist without consequential impact on service quality creating a zone of tolerance between them. When this zone of tolerance is violated by the overlapping of satisfiers and dissatisfiers, service quality and value perceptions are negatively affected.

2.3   Difficulties with Measuring Visitor Satisfaction

There are some inherent complexities in understanding visitor satisfaction due to the multivariate nature of "satisfaction" (Westbrook 1982), which engender concepts of

"quality and value" and compounded by variables such as motivation, personalities and experiences. Dyer, Aberdeen and Schuler (2002), in reflecting on the state of tourist satisfaction research conclude that the path to an understanding of tourist satisfaction is clearly not straightforward and that there is no consensus on the underlying concepts that may describe satisfaction.

Much of the academic literature on satisfaction comes from the Marketing discipline and stems from the fundamentals of the marketing concept which is based on the satisfaction of consumer needs and wants or desires. Consequently, if consumer expectations are not met it is deemed that that consumer will not be satisfied. The "disconfirmation of expectations" model has a lot of empirical support (Yi 1990; Oliver 1980;1989; Bowen 2001), indicating that somehow "expectations" are central to the understanding of satisfaction levels. Also, the drive to deliver greater value and superior quality requires an understanding of customer expectations (Parasuraman, Berry & Zeithaml, 1988).

Others argue that satisfaction with tourism services cannot be separated from an individual's life experience and life satisfaction (Gilbert & Abdullah, 2002). The various aspects of travel and tourism experiences' including the pre-trip, en route, destination and return trip services, have a direct impact on the overall life satisfaction experienced by individuals (Neil, Sirgy & Uysal 1999). The conceptualising of what constitutes satisfaction and what processes are involved has resulted in a number of researchers developing evaluation standards (Woodruff, Cadotte & Jenkins, 1983; Day 1982; Fisk & Coney 1988). Cadotte, Woodruff and Jenkins (1987) argue that while expectations cannot be ruled out as a possible proxy for a kind of standard, it is by no means the only standard consumers use.

Customer expectations are influenced by the nature of the product, the context and the characteristics of the individual (Oliver 1980). The characteristics and the experiences of the individual seem to play a central role in the expectation formation process. The implicit and explicit service promises gleamed from media and publicity, word-of-mouth and the individual's past experiences are also the key to how expectations are formed (Zeithaml, Berry& Parasuraman 1993).

The level of satisfaction experienced by a visitor is influenced by both the quality as well as the value received. In the service sector the "quality construct" and the "value construct" must be differentiated (Sweeney & Soutar 1995), such that value is not always synonymous with quality (Stewart, Hope & Muhlemann 1998). Consumers make judgements on the service (or the visit) both during and after the service, so that the satisfaction experienced will be determined on the basis of a range of service dimensions. These dimensions could range from technical to functional in nature. When the experience is compared with the expectation, we get perceived service quality (Gronross 1984:39). Visitor satisfaction is affected not only by the perception of quality but also by the perceived value to be derived based on the price (or cost) of the visit. In a competitive marketplace price may be used as a proxy for value, providing the customer or visitor with a benchmark for evaluating value and, therefore, satisfaction.

Much of the literature on expectation relates to tangible goods. Tourism operations are largely service based requiring the visitor to come to the location for service "production and delivery" to commence. At the end of the visit the visitor leaves the site with nothing tangible but "an experience." The experience is the outcome of the individual's interaction with people and "product offerings," that make up the attractions of the specific site, a central place, a performance or an event.

From a practical and managerial point of view, it is perhaps best to concentrate on what role actual performance levels on the part of the service provider can play in ensuring that the greatest possible value is experienced by the consumer or visitor. Spreng, Scott and Olshavsky (1996) in their re-examination of the determinants of consumer satisfaction conclude that given the complexities of the satisfaction process the safest and possibly the best route to enhanced satisfaction may still lie in increased performance.

2.4   Weaknesses of Existing Models

In understanding the satisfaction levels associated with a particular tourist experience it is important to be mindful of a range of factors and issues surrounding the choice of a particular destination at a particular time (Ryan & Cessford 2003; Ryan & Glendon

1998). Zeithaml and Bitner (1996) argue that the concepts surrounding quality perceptions and satisfaction have fundamentally different causes and outcomes and any judgements made about them arise from multiple levels of analysis. The influences on such decisions and the basis on which such decisions are made would influence the expectations as well as the satisfaction experienced with a particular tourist venue.

The Expectation- Satisfaction Models tend to be discrete and as a rule do not account for any external variables, which are beyond the control of the tourist or the service provider (Crompton & MacKay 1989). For example, even with clearly formulated expectations, the satisfaction levels experienced by visitors to an outdoor concert may be greatly influenced by poor weather conditions or by the behaviour of other visitors or by the mere size of the crowd pressure on facilities. In such circumstances, the expectations are unlikely to be exceeded and could not be classed as being met. It could, however, be different, in which case the original expectation is not a good guide to satisfaction.

The Expectation- Satisfaction Models that attempt to explain customer or visitor satisfaction are based on models of consumer behaviour and decision-making process. These relate mostly to tangible goods in a competitive marketplace, where consumers go through various stages from unfulfilled need awareness, information search, evaluation of alternatives, purchase decision to a post purchase evaluation stage. The key underlying assumption of these models is that choices are available.

The very nature of the tourism activity is such that the tourist is motivated to have a good time and would generally have a tendency to downgrade importance of anything that may somehow negatively impinge on the overall holiday experience (Ryan 2003; Ryan & Cessford 2003). Many of these models have not been able to adequately explain and address the issues relating to visitor satisfaction and this has led to the discussion of the issues in relation to "levels of expectation", the "levels of acceptability" and the consumers' "zones of tolerance" (Zeithaml et al. 1993; Parasuraman, et al. 1994). More often than not, the focus of visitor satisfaction studies is on the reporting of satisfaction in aggregate terms using visitor characteristics and the extent to which they are satisfied. From a managerial perspective such data is taken as some form of justification and merit

for the existence of the program or service. It is seldom a useful policy making or program improvement tool.

In the normal consumer products market, the advice often given by experts is that marketers should return superior value if they are to perform better than competition and that the consumers "expectations" should not only be met but exceeded. In such a situation price becomes the proxy for value and the standard which can be used to compare and measure value. In the tourism markets where choices are available and some understanding of price elasticities exist, the willingness to pay and conduct exchange will be based on how the expectations will be met.

In the leisure market "expectation" appear to be less explicit in the decision process and the consumer market buying decision processes have not been able to adequately explain how and why leisure consumption decision are made. Koran and Koran (1986,12) report that a large proportion of museum visitors were there to fill time, to be entertained or to satisfy curiosity. Much of leisure tourism activities are about discovery and involve a large component of total value or satisfaction coming from aspects that are unexpected, new, or unanticipated. Such reaction is referred to as "customer delight" which arises from "unknown environments" as distinct from customer satisfaction, which arises from known circumstances and known variables (Chandler 1989:.30). In leisure tourism markets (and especially cultural and heritage tourism) as distinct from consumer product markets, the focus is much more on the unknown and the unexpected. To some degree, customer satisfaction can be influenced by avoiding problems (performance model), while customer delight or surprise with an experience is a deeper emotional response (Uysal & Noe 2003). Perhaps this is what a number of researchers refer to as "exceeding expectation' (Oliver 1980; Westbrook & Oliver 1991; Hirschman & Holbrook, 1982).

2.5   The skewness of satisfaction in public goods

Visitor satisfaction studies, especially those in the leisure markets, are always skewed towards satisfaction and this is especially so when it is a free product. Noe and Uysal (1997, p. 223) declare that "a positive halo effect" encompasses leisure-time activities

and behaviours. There is a general tendency in leisure and recreational research towards a positive skewness of customer satisfaction ratings (Robinson 1973). William and Patterson (1999) found in their study that respondents tended to rate satisfaction highly, with a very small proportion (<10%) responding with a rating below "mostly satisfies." Normal expectation – satisfaction models, which have much empirical support were developed using data from consumers markets based on an exchange process. With public goods (free) the skewness towards satisfaction is expected to be even greater. Therefore, care is needed in developing measurement tools that are designed to measure satisfaction because the respondent will not have a price that they can use as a proxy for establishing their expectations. This does not take away any control from the service provider, but bestows a greater responsibility on the provider to create value for the visitor through performance, understanding of the visitor's needs and expectations and brand image. The "performance" in this context has a number of components, such products offered, experience given, feelings evoked in the visitor, and various service delivery tasks.

2.6   A "Visitor Value" Management Model

The visit outcomes are the "values" received from the visit or the use of the public good. This is determined by the visitor's expectation of value and quality and the actual experience of the value and the quality. How this can be managed is depicted in Figure 2 below:
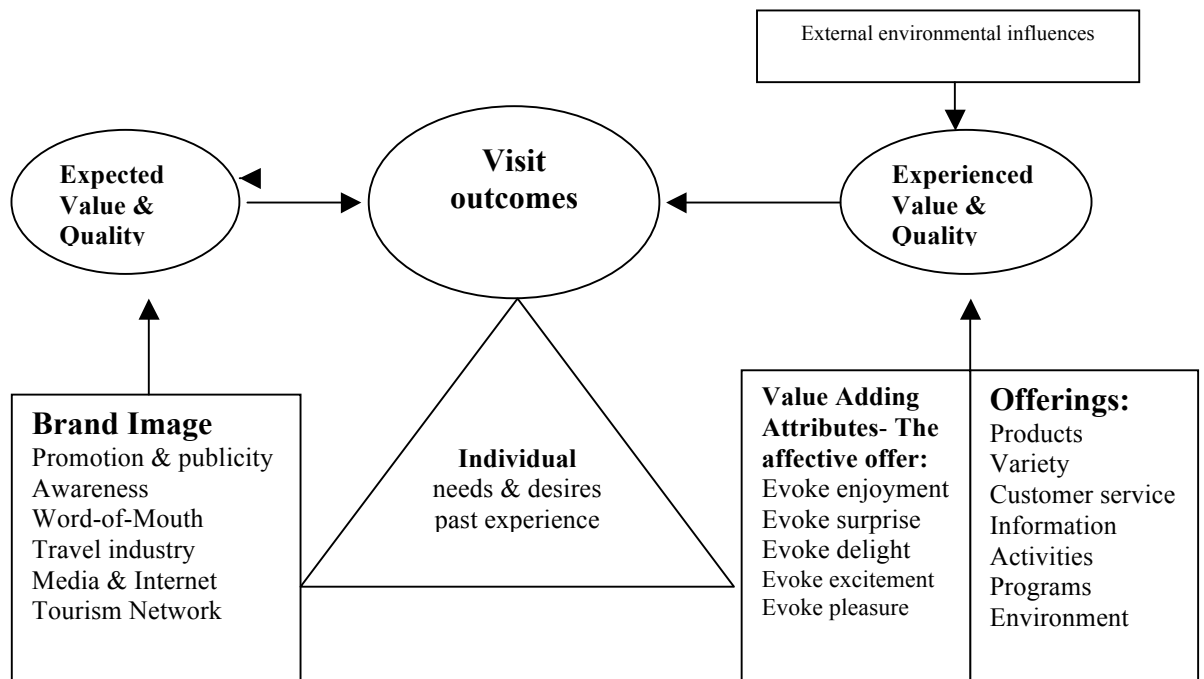
Figure 1: Visitor value management

Expected value:

The visitor's expectation of value to be received through participation would be shaped by the individual's motivations. The formulation of their expectation can be "managed" through the creation of a brand image, through promotion and publicity programs, through word-of-mouth, and other marketing activities. The literature suggests that expectations may not be a good guide to satisfaction in the tourism sector (Crompton & MacKay 1989; Ryan & Cessford 2003). While there are some "uncontrollable" factors impacting on expectations both on the part of the visitor and the service provide, it is important both in the competitive and the public goods sectors that the tourism organisation see the expectation formulation process as being able to be influenced by the activities, policies and programs implemented by the organisation. Basically, this is the marketing and brand image creation role of the service provider. This model suggests that the expectation creation process needs to be managed and be reflected in the goals

of the organisation, especially in the public goods sector and where normal market forces may have limited influence.

Experienced value (Performance):

There are a number of factors that influence the total perceived value. The first group includes the individual personality, lifestyle and motivation, past experiences, as well as their social and cultural background. This is denoted by the triangle in the model. These shape the needs and desires that the individual seeks to fulfil and will have a direct influence on how expectations are formed and their perception of visit outcomes. Management does not have control over any of these elements, but these may influence the nature, design and composition of the offerings.

The value and quality that is experienced by the visitor is defined by the organisational offerings as per its charter. In the case of cultural and heritage tourism the literature supports that service offerings cater for both the instrumental (products, activities and programs)and expressive or emotional dimension, as these work in combination to produce overall satisfaction (Swan & Combs 1976, Uysal & Noe 2003). The cognitive appraisals of the tourism experience results in emotional responses, which are fundamental to the consumption process for any experience to occur (Bosque & Martin 2008). The experience of emotion arises, firstly, from an automatic arousal evoking some fundamental emotions, which are then appraised during or after consumption. Secondly, cognitive interpretation begins when the customer makes an assessment of the significance of the stimulus towards satisfaction or dissatisfaction (Schachter 1964). Therefore, in the design and development of cultural and heritage tourism products both the emotional and the cognitive dimensions must be considered. It is the role of the organisation to enhance visitor experience of value and quality through the management of its core competencies and to create a brand value which reflects the services delivered. In the model, this is represented by the two boxes labelled "Offering" (more cognitive) and "Value Adding Attributes" (more emotional). The visitor experience is created or enhanced by bundle of benefits being offered. External environmental forces may also have an impact on this experience.

2.7 A Market-based Performance Monitoring Model

As has been mentioned before, visitor expectations and visitor experiences need to be managed, not only in the context of the competitive marketplace but also in relation to public goods and services, if they are to remain relevant and if they are to retain their value-adding potential. This was referred to as the "value management system" in the previous section. In order to achieve continuous improvement and to remain relevant in a changing and often demanding marketplace, performance monitoring and the re-evaluation of operational and strategic objectives, is deemed by many management gurus as an integral part of the management process. The changes in the market mood and trends require constant monitoring. Therefore, a performance monitoring model, which includes quality, value and relevance benchmarking is proposed and presented below (Figure 2).

The starting point of any performance evaluation system are the oganisational mission and operational objectives, which guide the various offerings and services; and consumers (visitors) who are the target of the offerings. The performance monitoring model is designed firstly, to measure gaps that may exist between visitor expectations and management perceptions, which may provide indications of program relevance and program effectiveness. Secondly, the monitoring system must provide indications of gaps between service quality standards and service delivery so that performance improvement strategies can be developed. Thirdly, gaps in service delivery and the communication of the brand image need to be identified so that management is in a position to "manage" the expectation formation process and through continuous improvement strategies minimize the discrepancies that may arise between visitor expectations and the visitor experience.
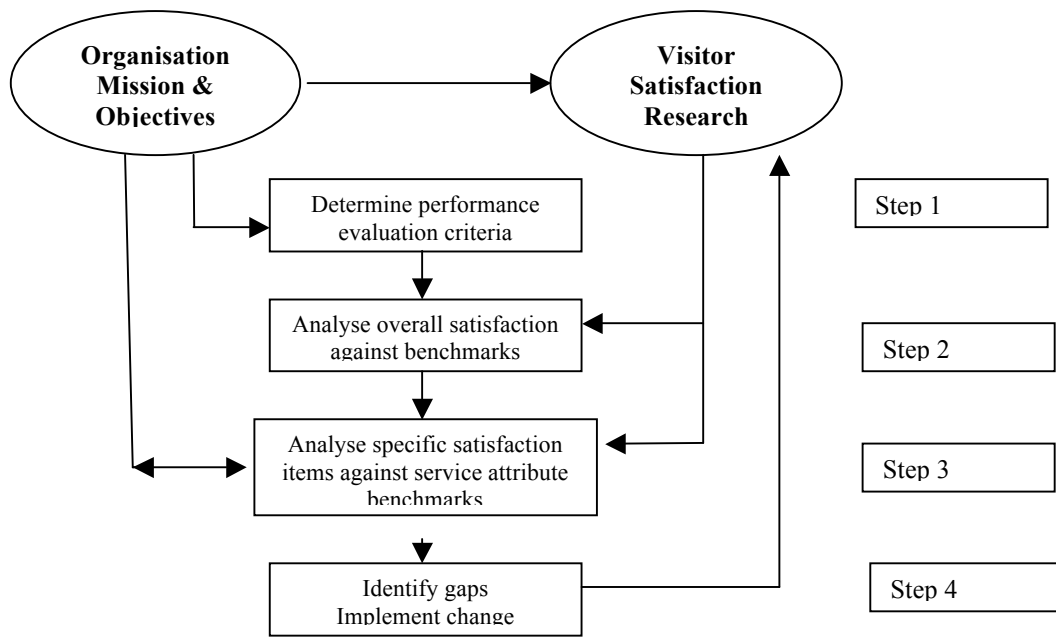
Figure 2: Performance Monitoring Model

The gap identification process demonstrated in Figure 2 will provide some insight into service achievements against operational benchmarks that have been determined by management as the performance evaluation platform and criteria. These criteria would, for instance, take into account the management capacity and resource availability and may be based on cost-benefit analysis. For example, management may need to access the cost of delivering 100% satisfaction compared to 95% satisfaction and deem it to be not financially viable as the cost of the extra 5% satisfaction may be too high. The establishment of such criteria is an important management function and become more operationally meaningful if they can be related closely to organisational mission and objectives. Some objectives may be more important than others and management would deem that their achievement at a higher level of satisfaction compared to other objectives. Satisfaction gaps in aggregated terms seldom give operational signals or directions, and therefore must be benchmarked against operational objectives. The degree of satisfaction experienced by the customer can be evaluated through understanding customer responses to specific service attributes (Mai & Ness 2006).

Finally, service gaps identified must be remedied. Where service weaknesses are identified or fail to meet set benchmarks, change strategies need to be implemented to

improve the service outcomes. These changes will need to be evaluated to assess if outcomes have in fact been improved and can be achieved by smaller specific studies rather than a full scale visitor satisfaction study that covers all objectives.

2.8   The use of benchmarking in tourism

Benchmarking is widely used in a wide range of manufacturing and service industries, especially where some form of accreditation systems have been implemented. In the tourism sector the use of forms of benchmarking are quite prevalent, such as in hotel star ratings and also in the case of food and beverage organisations (Fuchs & Weiermair 2001, Fuchs, Peters & Weiermair 2002, Fuchs & Weiermair 2004). There still remains considerable potential to utilise forms of benchmarking in small and medium sized tourism sectors and even tourist destinations (Kozak & Rimmington 1998:184). The benefit of some form of benchmarking could be the key impetus for service improvements even in small tourism firms, without the existence of some industry-wide benchmarks. In a competitive market the firm that is able to best meet the changing needs of the customer is more likely to survive, return greater profits and gain competitive advantage (Ritchie & Crouch 2000)

At the firm level, benchmarking is about customer responsiveness and the alignment of organisational objectives with the needs of the market. The only reliable source of information about tourism performance is the visitor or consumer and often benchmarks set for performance must to a large extent be dictated by consumers. Customer satisfaction surveys form the main information sources and because benchmarks are numerical measures, there needs to be greater reliance on quantitative information.

The literature does not provide much insight into firm level benchmarking of performance, because it is most often used at industry level and is defined by desired standards or by industry best practice. Benchmarking is generally thought of as being a process of comparing the organisation's performance against that of the best in the industry (Vaziri 1992). At a firm level, and in the absence of any industry standard, performance improvement must still occur and quality still needs to be managed. In this

context, standards must be set by management so that performance can be judged (Camp 1989). The judgement on performance is determined by the extent to which customers are satisfied and by the proportion of customers not fully satisfied.

CHAPTER 3: METHODOLOGY

3.1 Data collection and analysis framework

The framework for performance monitoring was developed in chapter 2, section 2.7.2, and was referred to as the performance monitoring model. In Figure X this model has been expanded to identify the types and sources of data that will be required to enable the performance monitoring and service enhancement programs to be identified and
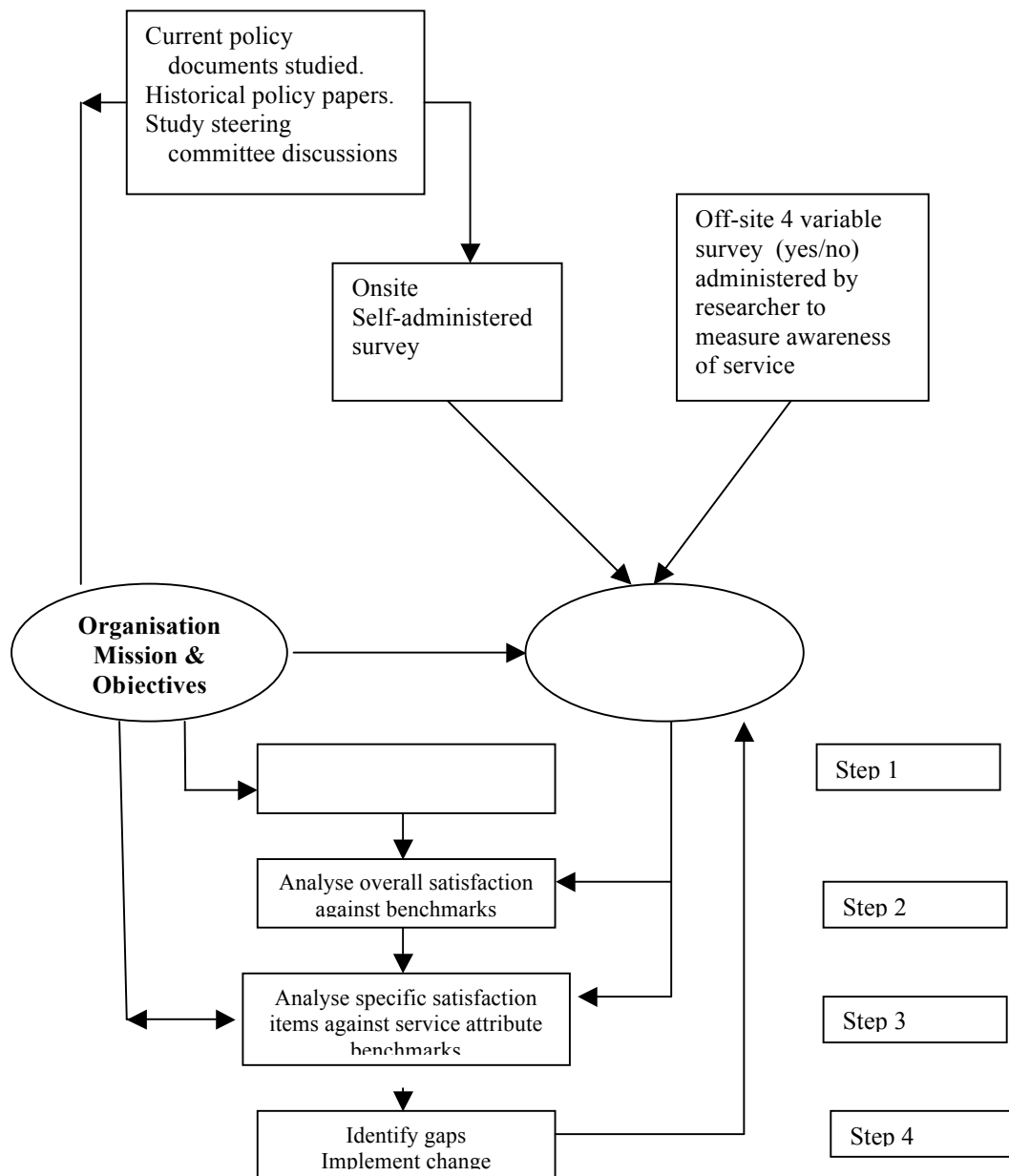

Figure 3: Data collection and analysis framework

implemented. In tourism markets, as for other businesses, satisfaction can be measured using customers as the main source. However, marketing managers are concerned also about potential customers who may not be using the service because of problems of awareness. This cannot be easily derived from self-administered instruments that have size and time constraints on them. Consequently, to test awareness, off-site surveys that address issue of awareness are more efficient.

3.2   Survey instrument design considerations

3.2.1 Research considerations

The norms in society are continuously changing and consequently the ways in which various professions serve society changes. Most people are familiar with ethical considerations in marketing and how these may impact on individuals and consumers. Unethical practices in this area has led to the rise many consumer advocate organisations and legislations to protect consumer rights. Different professions have different codes of conduct, some self regulated and others regulated by legislation. There are legislations like the privacy laws which cross all professions and in some ways define codes of conduct.

In research activity there are a number of stakeholders, such as those that participate in research as subjects. This includes both human and non-human research subjects. Those from whom information is collected or those who are studied by the researcher are participants and rights must be protected. The researcher is also a stakeholder and must abide by rules of ethical conduct. A body funding the research may have a vested interest in a particular finding or the way a research is to presented. This can compromise the ethical standing of the research. The independence of the parties is important in the maintenance of ethical standards of research (Kumar, 1996).

In data collection the wasting of the respondent's time may be deemed to be unethical. Therefore, the research purpose and objectives must be worthy and of some value to society. If the research is going to be of some benefit to society directly or indirectly, it is acceptable to ask questions provided that the respondent's informed consent is provided. Therefore it is important justify the relevance of the research, the reasons for which data is being collected and how they will be used. During the data collection

phase staff were available to explain the reasons for the study and how findings were to be used. Respondents must be in a position to give such informed consent. Sharing information about a respondent with others is unethical (Kumar, 1996). It is important to maintain confidentiality and respondents must be willing and able to provide information.

The researcher has obligations in the research process. One such obligation is the use of an appropriate methodology. This could apply to sample selection (which could be biased), the data collection instrument must be valid, and conclusions should be drawn that are justifiable.

Sometimes organisations may commission a research to justify their decision. Participation in such an exercise will be unethical. In this study two organisations were involved, one with the responsibility for service delivery and operational management and the other with oversight responsibility. The interest of both parties was to understand satisfaction levels and quality improvements for the future.

3.2.2 Survey instrument approval process

There were a number of operational conditions set on the data collection stage and this was discussed at length with the managers of the centre were data was collected. There were limitations placed on the number of variables that could be included in the survey and each item had to be justified to an operational steering committee. The length of the survey was critically monitored and only a minimum number of items were approved for addressing the operational goals of the organisations.

The second stage of the approval process involved the body responsible for overseeing programs and services at the centre (Parks Victoria). The requirements of this agencies included both operational and strategic considerations. The research had to reconcile the needs and demands of both groups often through delicate negotiation. There were operational requirements imposed limiting the survey forms to a single sheet. Service organisations are mindful of the range of ethical considerations discussed in section 3.6.1 and committed to the protection of consumer rights and the implementation of

privacy laws. Such organisations are aware of the need to efficiently get meaningful data, limiting the variables to be investigated to a minimum and specified that completion time should be about ten to fifteen minutes.

3.2.3 Survey item generation

The survey items generation was based on the 'visitor value management model' developed in chapter 2, section 2.7.1, which identified issues relating to visitor expectation formation as well as the programs and services contributing to the visitor experience. The first block contained six items related to visitor profile to determine gender, age, overseas or domestic origin, whether first visit, whether on packaged tour, and if staying away from home overnight.

The second block related to the level of satisfaction experienced. This was measured by ten survey items generated from tourism literature and derived from offerings by the organisation. These were measured using a six-point scale. The third block contained twenty statements and sought the respondent's level of agreement or disagreement, using a five-point scale between agree strongly and disagree strongly. These items related to service perceptions and service performance. In addition to this, visitors were asked to record the time taken by the visit and if this was enough time to satisfactorily complete the visit. Finally, respondents were asked to comment on their experience and raise any issues that may be of value to management for future planning and service experience improvements.

The survey items fell into two categories. The first category sought scaled response on the visitor level of satisfaction. Chapter 2 identified SERVQUAL, which views service quality as the gap between the expectation and the perception of the service experience, as the dominant measure of service quality. It was also noted that this scale did not offer consistent results when in a number of industries and situations (Carman, 1990). Performance-based measures were better able to explain service quality (Churchill and Suprenant, 1982). The two dimensions of service quality were identified by Gronroos (1990) as technical and functional quality. Technical quality is the outcome dimension, what the consumer is left with once the service process is over and is the technical

solution to the problem. For example, in a museum setting, an objective might be to provide visitors with a learning and education experience. This would be part of the 'technical' quality dimension. If visitors were paying for such a service then the value received in exchange for the price could be classified as technical quality.

The items selected for the measurement of functional quality dimension of total satisfaction were adapted from measures used by Spreng and Mackoy, (1996); Sweeney et al, (1999) and Dabholar (2000). In this study, the functional objectives of the organisation being studied were translated as performance evaluation measures of various operational aims. For example, one of the operations aims was to provide a 'high level of cleanliness and hygiene" at the site.

3.2.4 The choice of scales

The Leisure Motivation Scale (LMS) has been used to identify variables that should be measured to determine visitor satisfaction. The LMS identifies four motives that determine satisfaction derived from leisure pursuits. The first involves the intellectual motive involving activities such as learning, exploring, discovering and may involve thoughtfulness and imagination. The second is the social motive, which relate to and involves the need for friendship and interpersonal relations. The third is the competence-mastery motive which relates to the need to "achieve, master, challenge, and compete". The fourth is the stimulus avoidance motive seeking relaxation, calmness, solitude and the breaking away from routine. (Beard & Ragheb, 1983, p. 225) Churchill and Surprenant (1982) argue that the type of product category under consideration would have an effect on how performance expectation influences satisfaction. If actual performance is close to expectation, then the level of satisfaction experienced will be positively influenced by those expectations. However, if actual performance is sufficiently different from pre-purchase expectations, then this expectation will have either no effect or a negative effect on subsequent judgement (Sherif & Hovland 1961). Therefore, visitor satisfaction data collection should be based on at least two dimensions.

In social science research where concepts are complex single, item responses are inadequate for explaining relationships between variables. Therefore, a scale is a

composite measure of a concept, generally requiring the measurement of a number of items to enable proper explanation. For example, SERVQUAL provide a scale for measuring service quality. Generally, in the social sciences, getting insights into concepts requires the measurement of multiple items that may relate to various service attributes. The measurement of multiple items helps reliability and avoids misinterpretation, which can occur with single-item measurements. It is generally the rule that the complex the concept the greater the number of items required to understand it (de Vaus, 1995, p250).

In addition to being valid and reliable, the research instrument should be capable of measuring finer distinctions that need to be revealed in social research measuring shifts in attitudes or degrees of satisfaction. Scales that have equal parts provide a greater scope for more refined measurement. In relation measuring satisfaction, expectation and perception will vary amongst respondents because of personal characteristics, personal factors and situational factors. Interval - scaled responses are more likely to explain the variation in satisfaction caused by these factors.

In the questionnaire design stage careful consideration was given to the choice of scales as well as the choice of the number of categories. One important and overriding consideration was that visitors would complete the voluntary survey at the end of their visit may face time pressures. The number of categories in the scale and the number of items that needed to be addressed had to be carefully balanced with time taken to respond. Therefore, it was considered that 7 – point scales would unnecessarily increase the complicity and discourage thoughtful response. The number of items was limited to the minimum that would be required to address the performance objectives.

The measurement used to address the satisfaction level was a 6 – point forced scale, so that there was no mid-point which could be used to give a neutral or no opinion category. As explained above, this was done more for operational reasons with a view to using the data to develop decision benchmarks. One weakness of this approach is that in cases where the respondent had not formed an opinion about the item they would still be forced to take a position on the item. There is, in such cases, always an option for the

respondent not to respond to the particular item, and would be registered as a "missing value."

The first dimension is to seek information on satisfaction levels reached across a range factors deemed pertinent to the individual with respect to the activity, such as a visit to a museum. As discussed previously, there are instrumental (maintenance factors) and expressive indicators (core experiences or benefits) of satisfaction (Noe 1987; Czepiel & Rosenberg 1974). This can be measured using a numerical scale. In this study the level of satisfaction, across a number factors, was measured using a 6-point scale (with 6 being Very High and 1 being Very Low).

In the literature, any attempts to measure opinions or attitudes typically utilise either a 5-point or a 7-point scale, which provides a mid-point with equal number of options on either side. The purpose of selecting a 6-point scale was the desire to present a continuum so that a benchmarking decision system could be developed. Often in a Likert-type scale mid-points can represent "unsure" and would be mathematically unusable for benchmarking purposes unless the cases in the mid-point were ignored from the analysis. That is not to say that these cases are unusable or meaningless, because they may possess "hidden" or underlying meaning, especially in relation to what respondents may not be saying.

The second dimension is to seek information, opinions and attitudes on "performance", as suggested by the literature discussed in the previous section. In order to collect relevant information on "performance" one needs to understand the nature and characteristics of the industry (if relevant) and more specially, the missions and objectives of the enterprise. This will identify the issues that the research must address if visitor satisfaction is to be meaningfully measured.

Consequently, the visitors were asked to indicate their level of agreement or disagreement to twenty items (statements) using a 5-point Likert scale (5 = Agree Strongly to 1 = Disagree Strongly). These items were selected based on the typical objectives that the organisation was deemed to be pursuing, using the literature and publicly available information.

3.2.5 Survey pilot study

 Prior to the development of the final questionnaire a pilot study was conducted to test the responses, the ease with which the questionnaire was completed and the amount of time that completion required. A total of 18 self administered questionnaires were completed and 5 were based on an interview (researcher asked the question on the form and recorded the response) to evaluate the understanding of the meaning of the questions and their reference.

The completion process for the self-administered surveys was timed and this ranged from 8 minutes to 23 minutes, with an average 15 minutes. The interviews identified a number of issues. Questions requiring a categorical response (yes/no) did not present any problem, nor did the comments section of the survey. Some statements were reworded, and some were combined in order to reduce the response time to approximately10 minutes. Even from the small number of interviews, a number of issues were raised that resulted in some statements being removed and others added. This process was found to be extremely useful in refining and rearranging the survey form and reducing its overall size, without compromising the integrity of the data. The pilot stage also involved a number of informal discussions with visitors about their experiences from the visit.

The final survey form was approved by both the Centre management group and Parks Victoria, after some minor word changes.

3.2.6 Data collection procedure

The data collection focussed on the satisfaction of visitors with organisation performance across ten operational objects that the organisation was deemed to have responsibility to deliver.
The data collection, using the self-administered survey forms was conducted over 17 days, incorporating three weekends. Posters were place around the Centre notifying visitors that a survey was being conducted. A special area was set aside with a capacity to seat 4 people. Post boxes were placed at two locations to deposit the completed forms

and blank forms were readily available at three locations at the Centre. Incentive was provided with the option to go into a draw for a prize of $200 value of goods from the Centre shop.

There were 522 usable forms returned, out of which 230 included comments with ideas and suggestions to improve the Centre. A large number of these comments covered multiple issues. There were 330 comments received in total, relating to the following areas: general positive comments (67); displays, activities and information (95); signage (22); café, shop and amenity (53); staffing and staff interactions (16) and other comments not elsewhere included (27). A complete list of comments is presented in Appendix 2.

A second survey was conducted off site, in the town centre of Halls Gap. This comprised a short interview with 100 randomly selected visitors and local residents were excluded. The purpose of this "off site" survey was to ascertain the level of awareness of the Brambuk and National Parks Information Centre, which is located about 3 kilometres outside the town. This interview survey also asked about previous visit, intention to visit and satisfaction ranking on a scale of 10 (excellent) to 1 (poor). This was considered a critical part of the research to get a picture of the "missed market."

Data was analysed using SPSS Version 15.

CHAPTER 4: ANALYSIS AND FINDINGS

4.1 Visitor profile and awareness levels

4.1.1 Visitor Characteristics

The survey was conducted over Easter and stretching into the school holiday period, which is traditionally the peak tourist season in the region. There were 522 respondents, off which 65% were females and 35% males. This imbalance is likely explained by females being probably more willing to complete the survey questionnaire and / or to express their views rather than attendance at venues. The age distribution of the respondents displayed a good mix of ages with 20% being less than 20 years old; 56.5% being in the 20-49 age group and 23.7% representing the over 50 age group. The survey captured a good representation of the various age cohorts.

Table 1: **Age Distribution by Gender**

Age Groups	Females		Males		Total	
	No.	%	No.	%	No.	%
Less than 20 yrs	63	61.7	39	38.3	102	20.0
20 – 29	62	72.9	23	27.1	85	16.6
30 - 39	62	60.2	41	39.8	103	20.2
40 - 49	72	72.0	28	20.0	100	19.5
50 + years	72	21.8	49	27.2	121	23.7
Total	**331**	**64.8**	**180**	**35.2**	**511**	**100.0**

Most respondents had arrived by car (79.3%)., followed by 6.5% by tour bus and 13.8% arrived by other means, which were mainly cycling and walking. Since most visitors were on holidays in the area, the proximity of their holiday accommodation would have been an important consideration in how one actually went to the Centre. A number of visitors said that they only came across the Centre while they were cycling on the nearby bike paths. Also, the Centre is approximately 3 kilometres from the centre of town, which may account for the high use of car.

Since the survey was conducted during the peak domestic holiday season, we expected most visitors to be domestic. Of the domestic respondents, 64% were from within

Victoria and the remaining 36% were from interstate. However, 16.1% (84) of the total respondents were from overseas.

Table 2:   **Respondents from Overseas**

Country	Number of respondents	%
Germany	15	17.9
Other Europe	24	28.6
UK & Ireland	17	20.2
USA & Canada	13	15.4
Asia	9	10.7
New Zealand	3	3.6
Other	3	3.6
Total	84	100.0

4.1.2   Time Spent at the Centre

A very high proportion of respondents spent one hour or less at the Centre in total (50%), and an additional 31% spent between one and two hours (Table 3). Only 10.1% spent between two and three hours and 8.7% spent more than 4 hours.

There was a statistically significant difference in the time spent between domestic and overseas visitors, $t = 2.683$, $df = 503$, $p = .008$. The time spent at the Centre by overseas visitors tended to be generally shorter, compared with domestic visitors, with 67.5% of the overseas visitors spending one hour or less compared to 47.1% of domestic visitors. It should be noted that some respondents from overseas may have been on packaged tours which generally allow only a fixed amount of time at each location. However, only 37 respondents were part of a packaged tour.

Table 3:   **Total Time Spent at the Centre**

Time	Number	%
One hour or less	255	50.4
Between 1 and 2 hours	157	31.0
Between 2 and 3 hours	51	10.1
Between 3 and 4 hours	22	4.3
More then 4 hours	20	4.2
Total	**507**	**100.0**

The average time spent at the Centre was one hour and forty minutes (with a standard deviation of 1 hour and 15 minutes). The analysis was controlled for time visits to determine if first visits were indeed longer. This was not the case. For first visits, the average time spent was 90 minutes (with sd = 68 minutes, indicating that most people fell into a range between approximately 20 minutes and two hours and 40 minutes. many of these are not technically visitors to the Centre but are there to finalise their park access requirements.

4.1.3   Repeat Visits

Almost 38% of the respondents were repeat visitors and 17% of these visitors had previously visited the Centre in either 2006 or 2007. Overall the probability of a revisit with 5 years is 23%.

4.1.4   Pre-visit Information Sources

The survey questionnaire provided a list of information sources about the Centre and respondents were asked to select any of the items that applied in their case with respect to the visit. Option was provided to include other items not on the list. For this analysis only first time visitors were included (n=325). The Table below presents the items ranked in order of popularity.

Word-of-mouth was by far the most important and the most influential in the decision to visit, with 27.8% of all visitors citing "friends and relatives" as their major source of information. The second ranked on the "influence scale" and second most popular source were the "Roadside Signs", with 24.5% of the visitors identifying this as a source of information and influence on their decision to visit. In addition, 21.4% of the respondents indicated that the "Tourist Information Centre" and 19.1% indicated that "Brochure in Parks and other locations" were important sources of information. The Information Centre is at the same site as Brambuk, therefore, it appears that in some cases the Information Centre was their main reason for coming and that the visit to Brambuk was a consequence of their Information Centre visit. In a few instances

visitors came across the Centre while they were riding or walking along the nearby bike trail.

For Overseas visitors, the most influential sources of information were "Travel Agents" (40%); "Guide Book" (21.5%); "Friends & Relatives" (15.4%) and "Tourist Information Centre" (7.7%). Other sources, including the "Internet" were only marginally utilised.

Table 4:   Comparing domestic and overseas visitor information sources

Sources of Information About the Centre	% of visitors using this source (Domestic + Overseas)	Ranking of the most influencing source	Ranking for Overseas visitors
Friends and Relatives (WOM)	27.8	1	3 (15.4%)
Roadside Signs	24.5	2	
Tourism Information Centre	21.4	4	4 (7.7%)
Brochures in Parks, etc	19.1	6	
Guide Book	17.5	5	2 (21.5%)
Travel Agent	10.0	3	1 (40%)
Internet	8.7	8	
Local Knowledge	4.9	7	
Media	2.9	9	
At Accommodation	1.3	10	
Sighted from bike track	0.6		

4.1.5   Awareness of Brambuk

The proportion of visitors relying on road signs may appear to be high, although it is quite normal for tourists to drive around and stop if something takes their interest. This trend was noticed in the early rounds of the questionnaire survey and prompted a quick survey of randomly selected visitors at the town centre. Visitors were asked if they had heard about Brambuk, the Living Aboriginal Cultural Tourist Centre. A surprisingly high proportion had not heard about the Centre and were very keen to get more information. Consequently, a formal survey of 100 randomly selected visitors was conducted in the township, involving a short interview, ascertaining knowledge of the Centre's existence.

The interview of 100 visitors in the main town centre found that 31% had not heard of Brambuk, the Aboriginal Culture Centre and / or the National Parks Tourist Centre. Only 24% had already visited the Centre at that visit and a further 24% were planning to visit during the current visit. However, a number of those were going to visit as a result of the interview, which had aroused their interest. This includes both domestic and overseas visitors. Only 20% of those interviewed had visited the Centre on a previous visit and many of these were intending to visit again during the current visit.

The overall pre-visit awareness of the Centre (of visitors to Halls Gap) was very poor. Only 56.7% of all visitors had heard of the Centre before their visit to the area. The Table below presents the information on awareness for domestic and overseas visitors.

Table 5:   Pre-Visit Awareness (Halls Gap visitors)

Visitor Source	% Awareness Pre-visit (all visitors)	% Awareness Pre-visit (First Time Visitors)
Domestic	59.2	41.4
Overseas	43.0	43.6
Total	56.7%	41.9%

As there were a large number of repeat visitors (especially domestic), the awareness level is shown for first time visitors also. For people visiting the area for the first time only 41.4% of domestic and 43.6% of overseas visitors were aware of the Centre prior to their visit. This is because tourists normally visit a particular well known tourist destination which may provide a range of tourist attractions. The attractions then need to be marketed to capture the attention of the tourist while at the destination. All indications, from the information from various sources provided above, are that the general level of public awareness is very low for the State's premier indigenous cultural tourist centre. As stated previously, 31% of people interviewed in the township had not heard of the Centre and 58.6% of domestic and 56.4% of overseas visitors to the town had not heard about the Centre prior to arriving at the destination.

4.2   Analysis of the levels of satisfaction

There is a general tendency in leisure and recreational research towards a positive skewness of customer satisfaction ratings (Peterson and Wilson 1992).

4.2.1 Analysis of means

The levels of satisfaction experienced by the visitors were measured using responses to ten items, using a six point scale from "Very High" to "Very Low". As is supported by the literature our expectation was that high levels of satisfaction would be experienced. The items were selected based on the literature and input from the staff at the Centre and are presented in Table 6 below.

Table 6:   Levels of Satisfaction – Mean Scores

Satisfaction Items	Mean Rating*	Standard Deviation
General environment and atmosphere	5.44	.678
The way in which things are presented and displayed	5.32	.785
The ease with which you can get information and advise	5.21	.869
The signage and labelling	5.22	.864
The knowledge and accessibility of staff	5.18	.903
The opening hours	5.17	.866
The layout of the Centre, the displays, shop and café	5.14	.716
The general accessibility of the various parts of the Centre	5.17	.895
The learning and education focus	5.25	.851
What is your overall level of satisfaction with this visit	5.37	.734

* This mean is based on a scale 6 = Very High to 1 = Very Low

There was no significant difference between males and females with respect to the above satisfaction scales. The level of satisfaction (rating) given by domestic and overseas visitors appeared to be different and a further analysis was conducted to determine the extent of the difference and the statistical significance of the difference, if any. This is presented in Table 7 below.

Table 7:   **Comparison of Mean Satisfaction Scores for Domestic and Overseas Visitors**

Satisfaction Items	Mean Rating*		Significant
	Domestic	Overseas	Difference
General environment and atmosphere (**S1**)	5.46	5.29	Yes (p=**.037**)
The way in which things are presented and displayed (**S2**)	5.37	5.05	Yes (p=**.001**)
The ease with which you can get information and advise (**S3**)	5.23	5.13	No
The signage and labelling (**S4)**	5.26	5.05	Yes (p=**.048**)
The knowledge and accessibility of staff (**S5**)	5.18	5.20	No
The opening hours (**S6**)	5.25	4.85	Yes (p=**.001**)
The layout of the Centre, the displays, shop and café (**S7**)	5.44	5.28	No
The general accessibility to the various parts of the Centre (**S8**)	5.23	4.87	Yes (p=**.002**)
The learning and education focus (**S9**)	5.30	5.00	Yes (p=**.010**)
What is your overall level of satisfaction with this visit (**S10**)	5.40	5.14	Yes (p=**.011**)

* This mean is based on a scale 6 = Very High to 1 = Very Low

In general, overseas visitors appeared less satisfied across all except one item when compared with domestic visitors and especially with opening hours and the general accessibility to the various parts of the Centre. This generally lower satisfaction registered by overseas visitors (in comparison to domestic visitors) may be due to higher expectations levels or a result of their experiences. A median score of 5 was registered by overseas respondents in relation to all items (S1 to S10) while domestic respondents registered a median score of 6 for items S1, S2, S7 and S10 and the remainder with a median score of 5. The consistency of the lower comparative scores could, however, be a signal for management to flag this as an issue for further investigation.

4.2.2 The willingness to recommend the Centre:

There seems to be a lot of evidence to support the view that high levels of satisfaction imply positive future behaviour towards the organization supplying the service (Bolton & Drew 1991, Fornell 1992, Taylor 1997). Service quality and tourist satisfaction are

significant determinants of the intention to revisit the destination or to recommend to friends and relatives (Castro et al 2007, Bigne et al 2001). Hui, Wan and Ho (2006) found the likelihood of tourist recommending a destination was positively related to their overall level of satisfaction. Brand image is a more affective and less cognitive based perception. Once a given level of satisfaction is attained it is more the emotional perception of the brand image that drives loyalty and influences customers' intention to recommend to others and to revisit themselves (Faullant, Matzler, and Fuller 2008). Huo and Miller (2007) in their study of a museum found that services rendered by staff plays a major role in enhancing the level of satisfaction and a visitor's willingness to recommend a museum to others.

When respondents were asked if they would be comfortable in recommending the Centre to others, 90.6% responded yes. This measure is often considered in the literature as a powerful indicator confirming satisfaction levels. However, while the negative response was very small (6 cases or 1.2%), there were 41 cases (8.2%) that remained neutral. This could be considered a relatively high number, given that the negatives and the neutrals approach 10% of the total respondents. Furthermore, 59% were strongly positive and 32% positive. Based on the previous analysis of satisfaction level data, one may have expected a greater willingness and readiness on the part of visitors to recommend the Centre.

"The willingness to recommend the Centre" was compared between domestic and overseas visitors and it was found that the mean for domestic visitors was higher at 4.54 and for overseas visitors the mean was 4.19. This difference was statistically significant when between group variations and within group variations were further investigated ($F(1,497) = 15.719$, $p < .0005$). The pattern of agreement or disagreement to this question, presented in the table below indicates that a higher proportion of overseas visitors (15.6%) choose to remain neutral and far fewer of the overseas respondents strongly agreed with this statement (40.2% of overseas visitors compared to 62.4% of the domestic visitors.

Table 8:   The willingness to recommend the Centre: Domestic vs Overseas

I would feel comfortable in recommending this Centre to others	Domestic Visitors (%)	Overseas Visitors (%)	All Visitors
Strongly Agree	62.4	40.2	58.9
Agree	30.1	41.6	31.9
Neither Agree or Disagree	6.6	15.6	8.0
Disagree	0.7	2.06	1.0
Strongly Disagree	0.2	0.0	0.2
Total Percent	100.0	100.0	100.0
Number of cases	n = 422	n = 77	n = 499

When asked if this was the best cultural centre they had visited, 5% of all visitors did not agree and 25% remained neutral. While the results overall are positive, the information presented here does require further contemplation from a policy and program perspective, in relation to any gaps that may exist between expectation and performance and especially for overseas visitors. It may be that for overseas visitors there was a greater expectation with respect to the detail and variety of programs and services offered and that those with overseas travel experience are better placed to make judgements on a comparative basis or are better informed about the range of similar offerings.

4.2.3 Satisfaction Levels within Different Age Groupings

The survey respondents were classified into three age groups, Group 1 being the Under 30 years (comprising 36.8% of cases), Group 2 being the 30-50 years (30.5% of cases) and Group 3 being the Over 50 years (23.7% of cases), to test if there were any differences in mean satisfaction scores.

A one-way between-group analysis of variance was conducted and using Post-hoc comparisons using Tukey HSD test, it was found that there were statistically significant differences between Group 1 (Under 30 years) and Groups 2 and 3 (30 + years), with respect to the four items presented in the Table below. No such difference was found with respect to the other items, which have therefore being excluded from this list.

Table 9:   Under 30 years Satisfaction Ratings

Satisfaction Items	Mean Rating		
	Under 30 Years	30+ Years	Significant Difference
General environment and atmosphere - **S1**	5.25	5.55	*F(2,510) = 12.134 ,p =.000*
The ease with which you can get information and advise - **S3**	5.02	5.36	*F(2,503) = 9.898, p =.000*
The knowledge and accessibility of staff -**S5**	5.02	5.30	*F(2,488) = 5.574, p =.004*
What is your overall level of satisfaction with this visit - **S10**	5.22	5.47	*F(2,505) = 7.642, p =.001*

This table shows that for these items the Under 30 group rates the satisfaction level to be lower than the *30+ age group*. The lower mean score given to Item S10 (overall level of satisfaction) may be explained by the lower score for items S1, S3 and S5 rather than the other items in the original list. This difference may be due to a number of reasons, such as the *Under 30 years* group having higher expectations.

4.2.4 Suggested benchmarking for low satisfaction

One reason for selecting a six point scale to measure the satisfaction levels with various items was to enable a clear half-way point so that this could form an arbitrary benchmark against which operational judgements can be made. There is no precedent in the literature, but without such a benchmark, satisfaction surveys are of limited operational value. If we set the benchmark at the mid-point of the satisfaction scale (6 = Very High to 1 = Very Low), which in this case is 3, (<4), then the focus of our interest would be the proportion of respondents falling at or below this score. The second parameter of the benchmark is to set a tolerance level in terms of the proportion of respondents falling below this level that management is willing to tolerate. This is arbitrarily set at 5% as shown in Table 10. For example, in Table10, "General environment and atmosphere" has a very high mean score of 5.44 (out of 6). Only 1% of respondents gave this item a

score of less than 4 (which is only about 6 individuals out of 522 in the survey). We have set of tolerance level at 5%. Since 1% is below our tolerance level, the satisfaction standards are deemed to have been achieved, and no operational action would be required with respect to this item. If the tolerance level had been exceeded, the item should be marked for closer examination and issues relating to it addressed.

Table 10: Benchmark Tolerance Level of 5%

Satisfaction Items	Mean Rating*	Benchmark for Low Satisfaction **
General environment and atmosphere	5.44	1.0%
The way in which things are presented and displayed	5.32	2.1%
The ease with which you can get information and advise	5.21	3.5%
The signage and labelling	5.22	4.3%
The knowledge and accessibility of staff	5.18	4.3%
The opening hours	5.17	4.4%
The layout of the Centre, the displays, shop and café	5.14	1.2%
The general accessibility of the various parts of the Centre	5.17	4.2%
The learning and education focus	5.25	2.6%
What is your overall level of satisfaction with this visit	5.37	1.6%

* This mean is based on a scale 6 = Very High to 1 = Very Low
** None of these items violate the TL if set at 5%

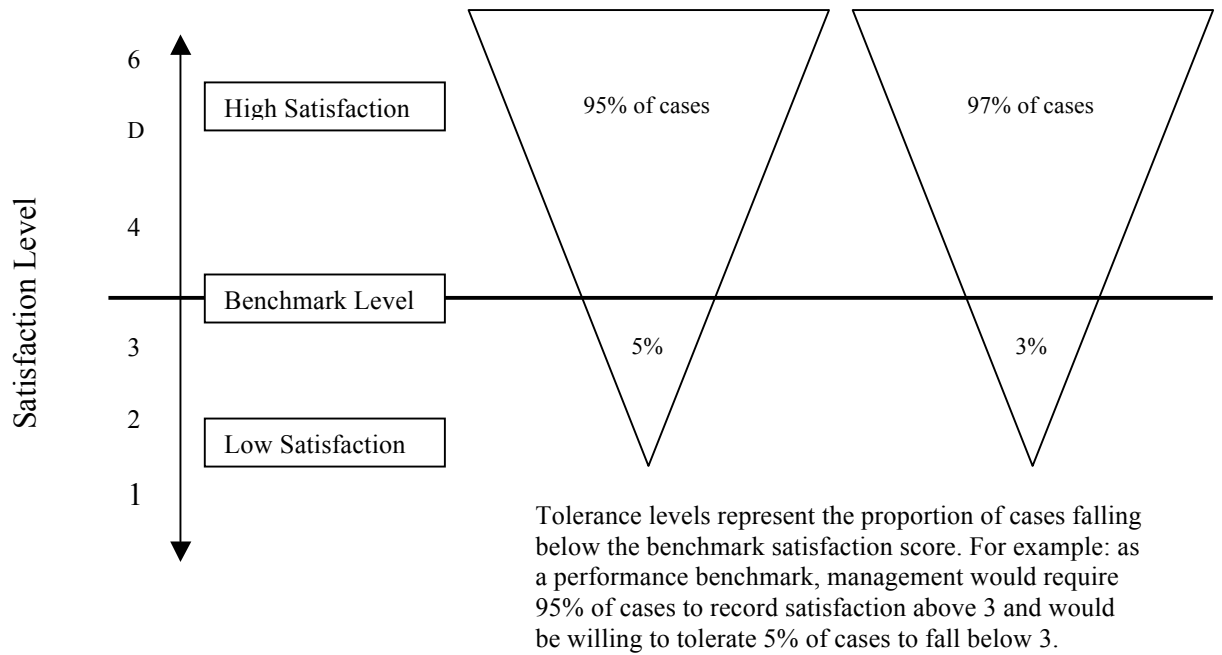The use of the benchmark satisfaction level is demonstrated in Figure 4.

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Figure 4: Setting satisfaction benchmarks

It should be noted that the setting of the appropriate Tolerance Level (TL) is a managerial decision. Since the TL was set at 5%, management should be extremely pleased with the results. As the next section of micro analysis will indicate, the methodology suggested here, while necessary, is not sufficient to determine dissatisfaction levels. If a stricter TL was set, say at 3% (i.e. no more than 3% of people with lower than the half way mark of the measurement scale (6 = Very High through 1= Very Low) the items in Table 11would be identified as being issues of concern for management.

Table 11:   **Items failing Tolerance Level of 3%**

Satisfaction Items	Mean Rating*	Benchmark for Low Satisfaction
The ease with which you can get information and advise	5.21	3.5%
The signage and labelling	5.22	4.3%
The knowledge and accessibility of staff	5.18	4.3%
The opening hours	5.17	4.4%
The general accessibility of the various parts of the Centre	5.17	4.2%

It appears that 3% may be a better Tolerance Level, which means that these areas or issues present a cause for concern for management. The more detailed analysis of a range of issues is undertaken in the next section. That analysis shows that most of the items in this list above may have contributed to degrees of discontent or dissatisfaction among the visitors. The one exception is the item "The opening hours", which here is flagged under our criteria as a matter of concern, but as only limited amount of data was collected on this issue, we are unable to confirm if this was indeed a major issue. However, what we can conclude from the satisfaction scale data on this issue is that 4.4% of respondents scored this as 3 or lower; 16.4% scored this as 4; 36.6% scored this as 5 and 42.6% scored this as 6 (maximum satisfaction). This resulted in a mean score of 5.17 and standard deviation of 0.866. Two comments were made by respondents relating to opening times:

> *Open longer in summer and autumn.*
> *Have the info centre and bathroom open longer.*

4.3 Analysis of underlying expectation-satisfaction against objectives

4.3.1 Introduction

From the literature review it can be concluded that visitor satisfaction levels in leisure activities is generally skewed towards satisfaction and that people are relaxed and perhaps less critical. As the satisfaction scale above demonstrates based on mean scores and their standard deviation, the satisfaction levels of visitors to the Centre were very high. The obvious managerial conclusion from the investigation of averages is that visitors are very satisfied and therefore, plans and programs are deemed to be performing to managerial expectations. A second level of analysis is required to uncover any gaps that may exist between visitor expectations and managerial expectations.

In order to evaluate performance it is important to undertake a measurement of satisfaction generally as well as with specific objective related indicators of "performance". These indicators should be based on the dimensions that may constitute satisfaction. Firstly, we need to assume that there will be a high level of satisfaction and turn our focus on understanding the non-positive end of the scale and create some operational benchmarks. It should be noted that this method may not be appropriate if sample size is small. The section below explains why satisfaction levels (scales), if used as a sole measure, can deliver an incomplete, if not misleading picture.

4.3.2 Understanding dissatisfaction

Generalised satisfaction scales (as the one discussed in the previous section) are not sufficient in themselves to determine how visitors may actually feel about a product, service or issue. In this study, in addition to satisfaction levels, visitors were asked to indicate their level of agreement or disagreement relating to twenty "performance" items. The items were selected based on the literature review of studies relating to cultural centres and museums, among others. Table 12 presents the mean scores and standard deviations for the items. The measurement used a 5 point Likert scale (5 = Strongly Agree to 1 = Strongly Disagree). The data will be subjected to more advanced statistical analysis later in the report, but the purpose of the analysis below is to conduct a micro analysis so that we can understand disagreements rather than agreement or dissatisfaction rather than satisfaction.

The choice of the twenty items was also guided by what management of such a tourism focussed enterprise may be interested in from an operational point of view. In line with the "value management" approach (diagram 1 above) the analysis below is organised around organisational goals and mission. For example, one of the goals is to provide visitors with an understanding of indigenous culture and history. This would be regarded as Brambuk's core competency (Prahalad and Hamel 1990). To address this, respondents were asked to rate their level of agreement or disagreement for two statements: "I gained a better insight into indigenous culture" and " I gained a better understanding of indigenous history."

We need to be mindful of the fact that there were practical restrictions on the size of the questionnaire and the time taken to complete it, which necessitated combining more than one issue in a statement. For example, the second item in the Table below combines the issue of centre maintenance and centre organisation. Table 12 below presents the items that were measured using the 5-point agreement – disagreement scale.

Table 12:   Performance item mean scores and standard deviation.

	Mean Score*	Std. Deviation
Overall, this visit was very enjoyable	4.51	.595
The centre is well maintained and well organised	4.60	.579
The displays and stands were informative	4.51	.640
The staff were knowledgeable and friendly	4.40	.726
I have learnt a lot on this visit	4.09	.870
There should be more educational emphasis in displays	3.28	1.041
I took particular notice of plants along the walkways	3.78	.979
The shop should provide a wider range of indigenous items and crafts for sale	3.32	1.051
I expected a greater variety of displays and information	2.82	1.044
I expected that the visit would take longer	2.82	.986
I would feel comfortable in recommending the Centre to others	4.48	.706
I gained a better insight into indigenous culture	4.23	.818
The service overall was of a high standard	4.34	.703
I had no difficulty with access to various parts of the Centre	4.43	.745
The Centre was easy to find	4.54	.700
This is one of the best Cultural centres I have visited	4.00	.923
I expected to see more than I did at This centre	2.90	1.093
I gained a better understanding of indigenous history	3.95	.851
I was able to get enough printed information to take home	3.62	.966
The displays adequately met my needs	4.07	.799

* (5 = Strongly Agree to 1 = Strongly Disagree)

4.3.3 Establishing benchmarks

Micro analysis requires a benchmark against which visitor responses can be effectively measured to avoid the danger of drawing favourable conclusions from visitor satisfaction surveys and overlooking symptoms or signals of dissatisfaction. Normally the setting of benchmarks is a managerial or policy decision. In the consumer goods and services markets benchmarks may be set for product returns, faulty goods, or the number of complaints. Some service organisations have benchmarks for how long a customer should have to wait to be served.

In leisure markets, where behaviour is skewed towards satisfaction anyway, benchmarks should address how many 'dissatisfied' (or not fully satisfied) customers one is willing to tolerate. For this analysis I shall use an arbitrary benchmark that a negative score of greater than 5% of cases should not be tolerated. Hence, where more than 5 per cent of respondents fall within the negative scores (negative part of the scale) this should signal that some underlying issues and problems may exist. Neutral scores can be a lot more difficult to decipher because they could include "not applicable to me"; "don't care about the issue"; "undecided"; "non committal" or "no opinion". But ignoring the neutral score may not be wise and should be treated on an issue by issue basis.

The following are an analysis of ten objectives, some of which would be common to many tourism products. The analysis relates to the items list in the Table above.

4.3.4 Analysis of satisfaction by objectives

Objective 1: Providing visitors 'enjoyment'

This was measured by the responses to the statement "Overall, this visit was very enjoyable," which recorded a mean score of 4.51 indicating that most people were in strong agreement that enjoyment was experienced. There were no disagreements and only 26 cases (5%) recorded a neutral response. This was the overall best result out of

the twenty statements used in the survey. There are a number of factors that could contribute to 'enjoyment' and visitors would expect a certain level of amenity. If these minimum standards are not met, 'enjoyment can be affected. For example, one comment was that *it's also hard to read all the info if there are lots of people in Brambuk, so maybe modernise the way the info is displayed*. Issues of this type can, therefore, impact on satisfaction and reliance only on quantitative data can miss warnings of this type uncovered by qualitative data gathering.

Objective 2: Providing a Centre that is well maintained and well organised.

This was measured using the statements: "The centre is well maintained and well organised." The mean scores of 4.60 indicate a highly positive response and strong agreement that this is happening. There were only 2 cases (0.4%) giving a negative score and only 15 cases (3%) staying neutral. The combining of two separate issues "well maintained" and "well organised" may have to some extent distorted the responses. For example, five respondents made negative comments about the condition and cleanliness of the toilet facilities. Visitors generally have expectation levels with respect to basic facilities and when these expectations are met does not add to satisfaction. However, when these expectations are not met they can drastically affect the overall level of satisfaction experienced, as demonstrated by the comment: *"The toilet facility could be better, apart from that it was a good experience."*

One respondent commented that Brambuk *"has a very 'library' feel to it, more music playing and a more engaging entrance would be good."* There were some comments relating to maintenance needs of Brambuk and the need for integrating it with the new developments:

> *The old culture centre is being neglected. It seems that there is nothing new since I visited 10 years ago. The National Park Centre is taking all of the focus and resources.*

> *Would be nice to see Brambuk, the original building refurbished and a connection between the two buildings.*

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The centre has a large open space that could be used more adequately. I feel it is too open and lifeless.

Objective 3:   Providing visitors an opportunity to learn

This was measured using the statements**: "**The displays and stands were informative";
The displays adequately met my needs" and "I was able to get enough printed
information to take home". The analysis is presented in the Table below:"I have leanrnt
a lot" – make same order as in table below

Table 13:   **Providing visitors an opportunity to learn**

	Mean Score	No. (%) with Negative Score (DS/D)	No. (%) with Neutral Score	Benchmark Met or Violated (>5% Negative)
The displays and stands were informative	4.51	4 (0.8%)	22 (4.4%)	Met
I was able to get enough printed information to take home	3.62	30 (**10.1**%)	113 (22.8%)	Violated
The displays adequately met my needs	4.07	16 (3.3%)	86 (17.5%)	Met*
I have learnt a lot on this visit	4.09	16 (3.2%)	105 (21.1%)	Met*

* The high neutral scores for these items could be regarded as a matter of concern. If the
benchmark had been set at 3% these performance item standards would have been
violated.

It appears that there is some room for improvement with regard to the provision of
printed information and leaflets, although much of this information may be readily
available on the internet. Perhaps a leaflet directing visitors to various websites from
where information of interest could be downloaded could be provided. A large
proportion of neutral score should be consider carefully as they may represent some
hidden service failure, in which case other sources of information may throw more light
on this matter. There were numerous comments received highlighting the need for more
information, more displays and more interactive activities. A sample is presented below:

More cultural and history leaflets to take away
Basic information on the geology, plants and animals we see on our walks – eg,
cockatoo, kookaburra, snakes, rocks and sandstone.
An info booklet containing information on seasons as in display
More in-depth information for people who already understand main issues. More
picture stories on aboriginal people today
Parks info is not detailed enough for experienced bushwalkers. More info and
displays on past and current indigenous lifestyles
The outdoor leisure map of northern Grampians is very out of date. Needs to be
updated as it is not a cheap map to buy and does not give enough walking track
details.
Was a bit boring, perhaps some more interactive activities and less reading.

Objective 4:   Providing a high standard of customer service

This was measured using the statements**: "**The staff were knowledgeable and friendly"
and "The service, overall, was of a high standard." The analysis is presented in Table 14
below:

Table 14:   **Providing a high standard of customer service**

	Mean Score	No. (%) with Negative Score (DS/D)	No. (%) with Neutral Score	Benchmark Met or Violated (>5% Negative)
The staff were knowledge and friendly	4.40	7 (1.4%)	50 (10.1%)	Met
The service, overall, was of a high standard	4.34	4 (0.8%)	52 (10.4%)	Met

Staff were seen as being very helpful in providing information, but visitors to Brambuk

Centre saw a need for easier access to staff to explain cultural and historical aspects of

the Centre. The comments below highlight this.

Parks Vic should spend more time training staff.
More staff to talk to so things can be explained.
Meeting, talking too, or seeing a performance by indigenous people would be
good.
Staff were very helpful.
More accessibility to staff – to ask questions
More indigenous staff roaming ready to explain things with their stories and
experiences (bit like Australia zoo).
Was very busy Easter weekend, there were queues at the desk and staff were
always engaged. There should be staff guiding groups through the Centre.

Objective 5:   Providing insight into indigenous culture

From the visit we would expect that visitors would gain a better insight into indigenous culture. While this was generally the case, the mean score of 4.23 is relatively high, with a large standard deviation of 0.818, which means that the scores were between 5.00 (strong agreement) and 3.41 (a bit better than neutral). It is important to note that 75 respondents were neutral (15%) and 12 were either in disagreement or strong disagreement (2.4%). Given that this item reflects the main purpose of the Centre, it may be important strategically to address why 17.4% of the respondents did not give a positive score. The answer may lie in the analysis of other service or product offerings, displays, activities, information, customer service and the like. This would also include individual characteristics, backgrounds and experiences, which influence their expectations.

Objective 6:   Providing an understanding of indigenous history

Similarly, with the item "I gained a better understanding of indigenous history" the mean score was 3.95 with a standard deviation of 0.851. There were 21 respondents who either disagreed or strongly disagreed with this item (4.2%) and 113 (22.8%) were neutral. Therefore, one could conclude that 27% were not willing to give a positive score. From the point of view of visitor satisfaction and as explained in the literature section of this report, the visitor responses are generally skewed towards satisfaction. The purpose of studies of this type is to identify underlying discontent and address any hidden issues with respect to satisfaction and expectation.

The results of these two important objectives (objectives 5 and 6) of the Centre are presented in Table 15 below. Although our arbitrary benchmarks are met, the second item is on the border line and the neutral response seems relatively high and may trigger managerial concern and evaluation of programs. There were a large number of comments received about the need for more displays, activities and information, indicating that expectations were relatively high. However, satisfaction levels with the visit were very positive in aggregate terms.

Table 15:   **Indigenous culture and history**

Items	Mean Score	No. (%) with Negative Score (DS/D)	No. (%) with Neutral Score	Benchmark Met or Violated (>5% Negative)
I gained a better insight into indigenous culture	4.23	12 (2.4%)	75 (15%)	Met
I gained a better understanding of indigenous history	3.95	21 (4.2%)	113 (22.8%)	Met*

* Note that if the benchmark had been set at 3%, the second of the items in the above table, "I gained a better understanding of indigenous history would have been violated. This item also has a very high (22.8%) neutral score and in total 27% of visitors did not deem this to have been achieved. On that basis one would class this as a performance item that needs to be addressed.

Objective 7:   Meeting visitor expectations

This was measured using the statements: "I expected a greater variety of displays and information"; "I expected to see more than I did at the centre" and "I expected that the visit would take longer than it did". The analysis is presented in Table 16:

Table 16:   **Expectations**

Items	Mean Score	No. (%) with Negative Score (AS/A)*	No. (%) with Neutral Score	Benchmark Met or Violated (>5% Negative)
I expected a greater variety of displays and information	2.82	111 (**22.5**%)	189 (38.4%)	Violated
I expected to see more than I did at the centre	2.82	92 (**18.7**%)	221 (45%)	Violated
I expected that the visit would take longer than it did	2.90	134 (**25.7**%)	173 (35%)	Violated
There should be **more** educational emphasis in displays	3.28	184 (**37.5**%)	203 (41.4%)	Violated

* Note in this set of statements the negative response is Agree Strongly and Agree

This analysis indicates that although the satisfaction levels were extremely high, in a large proportion of cases, visitor expectations were not met. For example, the earlier analysis of time spent at the Centre indicated that 50% of the visitors spent less than one hour at the Centre. The third item in the table above, "I expected that the visit would take longer than it did", indicates that in the case of 134 (25.7%) of visitors this expectation was not met and a further 173 (35%) were neutral. More than a third of all respondents (37.5%) either agreed or agreed strongly that there should be more educational emphasis in displays. The Table indicates that 22.5% of visitors were expecting a greater variety of displays and information and generally expected to see more at the Centre. Nevertheless, they were almost always satisfied with the visit and the level of enjoyment experienced from the visit was very high, in aggregate terms. An example of a comment reflecting that the Centre exceeded a visitor's expectations is *"I expected much less things then there is. I walked in and I was amazed."*

There were a number of suggestions offered by respondents in relation to displays and information that may explain the gaps between expectations and the actual experience. A sample of typical comments indicate that expectations may have be higher.

> *The centre was great and I would come back again but they might have been able to put more info on indigenous culture.*
> *Just add a little more historical information and photos.*
> *Some info about animals around the cultural centre eg, snakes*
> *Upgrade some photos and display panels*
> *Bigger exhibition for artworks*
> *More displays and hands on activities*
> *Some indigenous music playing. Was a bit boring, perhaps some more interactive activities and less reading*
> *More info and displays on past and current indigenous lifestyles*
> *I was pleasantly surprised with the greatly improved standard since my last visit.*
> *I would like more displays on Koorie life rather then photos.*
> *Very informative, very enjoyable – more stuff in centre?*
> *More detailed, in depth information.*
> *More about aboriginal culture, info, movie, history.*
> *More aboriginal workers, a big screen showing educational films about aboriginal culture.*
> *More info on aboriginal life and culture, eg religion and rituals*

Objective 8:   Increasing the accessibility of the Centre

This was measured using the statements: "I had no difficulty with access to the various parts of the Centre" and "The centre was easy to find." The results are presented in Table17: State results in text

Table 17:   **Increasing the accessibility of the Centre**

	Mean Score	No. (%) with Negative Score (AS/A)*	No. (%) with Neutral Score	Benchmark Met or Violated (>5% Negative)
I had no difficulty with access to the various parts of the Centre	4.43	14 (2.6%)	32 (6.4%)	Met
The centre was easy to find	4.54	7 (1.4%)	32 (6.4%)	Met

It should be noted that because the survey was conducted at the Centre, one would normally expect these responses. There were a large number of comments received relating to poor signage. A sample of typical comments is provided below:

> *Connect the shop and café to the educational centre. Had previously been to the front and did not know about Brambuk.*
> *Improved signs and direction to Brambuk centre from car park as many folk mistake the shop and café as the actual centre.*
> *Better signs for parking and how to enter the Brambuk centre from the shop.*
> *This place should be better advertised.*
> *Signage to centre could be better.*
> *Display video screens outside shop doors were not visible due to the sun.*
> *perhaps a screen over the display to block out sunlight.*
> *Distance sign post from halls gap town.*
> *I did not realise it was two buildings at first. Need more signs.*
> *Needs signs connecting the shop to the centre at the back.*
> *More advertising of this place needs to reach tourists outside this area.*

Objective 9:   Providing good visitor friendly amenities

Integrating facilities ("*I did not realise it was two buildings at first***").**

There were a number of comments about the disconnection between the new information centre and the original Brambuk and this disconnection, combined with poor direction signs, tended to create confusion about what was available at the site. In a few cases, those surveyed in the town said they had visited the Information Centre, yet did not

know that Brambuk was also at that site, despite their very keen desire to visit such a centre. One respondent to the survey at the Centre commented that she had been to the information part of the Centre the previous day and did not know Brambuk was also there.

A number of photographs are included in Appendix III and indicate the degree to which the new and the old buildings appear completely separate. Brambuk is almost invisible from the new section and visitors are unable to appreciate the iconic architectural value of the building. The pictures in the Appendix show the original entrance to Brambuk, which is no longer used, and the visitors enter through what was previously the rear exit. One pertinent comment was *"Brambuk looked closed until I got to the front door."*

A number of visitors commented about the lack of integration between the new section and the Brambuk Centre, which are capsulated by the following:

> *I feel there was no connection between the new building and the Brambuk centre. The feel of the new building needs to carry through to the old one. Needs to be like a journey from start to finish that you wander through. I thought the new building is fantastic.*
>
> *Congratulations with the new building. Would be nice to see Brambuk, the original building refurbished and a connection between the two buildings.*

Plants along walkways

Almost 10% of the visitors did not take much notice of the plants along walkways. Visitors noted that many plants indicated by plaques were missing and that it was difficult to identify the plants and relate them to the signs.

> *You should have more plants near the signs*
> *Garden signs need to be placed with actual plants.*
> *Couldn't find many of the plants along the walkway*

The café

Of those who responded to the survey, 65.1% actually made a purchase at the café, which occupies over 50% of the new floor-space and incorporates an outdoor area. About 10% of the visitors actually browsed in the café but did not buy anything.

Respondents were very positive about the ambience and there were a number of suggestions made that could enhance visitor experience. A number of visitors suggested that there should be some background indigenous music and that the walls could be used to put up displays or posters depicting indigenous culture.

The comments about the café were generally very positive… *"Bush tucker was fantastic; Bush Tucker café is great; Loved the food in the café, being a vegetarian I would like to see more vegetarian bush foods on the menu."*

However, there were some concerns raised about the waiting times, the need for staff to be trained in customer service and inadequate staffing to cater for the Easter crowd. There was a suggestion made that a leaflet about "bush tucker should be available or some information displayed on the walls," and another suggesting that *"the café have placemats with activity items to entertain and educate children."*

The Shop
"Indigenous items for sale in shop, generally are not priced"

The shop was well patronised with almost 90% of respondents visiting the shop and 40.2% of the respondents actually making a purchase. A number of visitors noted that many items were not priced and with staff always busy helping other clients, purchases could not be made or had to be deferred to a later time. Some suggestions for improvements were identified in comments made, such as:

More variety of Aboriginal products to be brought.
Provide info material on CD instead of books only.
More reasonable priced things for kids to purchase.
More variety in shop.

Advertising and Signage

A large number of comments were received about direction signs to the Centre, the lack of advertising boards in town to raise awareness of both the Information Centre and the Indigenous Cultural Centre, and poor signage in general around the Centre.

A survey in the township indicated that 31% did not know about the Brambuk or the Information Centre and a number of overseas visitors believed that the Information Centre was in the town as indicated by the *"i"* information sign on the maps and guidebooks. There was nothing else indicating that a bigger tourist information centre and Indigenous Centre existed. This was also noted by a number of visitors responding to the survey at the Centre as demonstrated by the following comments:

> *More signs in town and caravan parks promoting the centre.*
> *Larger and more prominent signage for tourists.*

Nearly 12% (59) of the respondents to the survey indicated that the signage and the direction signs were unclear or inadequate. From a marketing point of view this is a relatively high number, given that it is one that can easily be remedied. Signage also affects access and this issue was also covered in Objective 8 above.

The signage within the Centre was also a matter of concern for many visitors and this included signs that are too small to see, difficult to read in bright sunlight and sometimes missing. The following comment places the signage problems encountered in an important marketing context: "***the place is a little bit off the road. A little hard to make out what it is. Pleasantly surprised when we ventured in. Suggest more signage on roadside.***"

A sample of typical comment is presented below:

> *Better signs for the loop walk.*
> *Replace missing signs around centre.*
> *Better signs for the toilet from car park.*
> *Signage to the second building – not immediately apparent that the next building is freely accessible.*
> *Some more care needed on displays – not all were well signed and I wasn't sure if what I was looking at was old or new.*

Objective 10:   Setting service evaluation criteria and benchmarks

Visitor or customer satisfaction surveys are an important way to collect data of various aspects of service delivery, service quality as well as service relevance. Benchmarks and Tolerance Levels must be set as explained in this and earlier sections of this report. Management has a wide range of flexibility determining which levels these benchmarks are to be set, but without them the usefulness of visitor satisfaction studies would be greatly diminished. Visitor surveys should serve a dual purpose of identifying what is working (sources of satisfaction) and signs of what may not be working (sources of dissatisfaction) for visitors and customers. One of the objectives of this study was to provide a service evaluation methodology, which here is referred to as "Dissatisfaction Benchmarking" as a tool that management can use to effectively operationalise the findings of any visitor satisfaction research. Based on the forgoing analysis a benchmark of 3% would be the most appropriate, so that where satisfaction levels generally and performance items specifically return greater than 3% as a negative response, quality standards should be deemed to have not been met and managerial action would be required to address the issue.

CHAPTER 5: SUMMARY OF FINDINGS AND CONCLUSIONS

5.1   Time spent at the Center:

A large proportion of respondents spent one hour or less at the Centre in total (50%), and an additional 31% spent between one and two hours. This also formed the median "time spent" category, so that one could conclude that two hours would be the upper bounds of the time spent at the Centre. There was a statistically significant difference in the time spent between domestic and overseas visitors, with 67.5% of the overseas visitors spending one hour or less compared to 47.1% of domestic visitors. This may be due to the fact that international visitors are time conscious and tend to cover a wide range of destinations. The average time spent at the Centre was one hour and forty minutes (with a standard deviation of 1 hour and 15 minutes). The analysis was controlled for time

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visits to determine if first visits were indeed longer. This was not the case. For first visits only the average time spent was 90 minutes. How long visitors spend at a venue may depend of a range of individual factors and circumstances. However, it is important for program managers to consider the time spent by visitors relative to the value that is being delivered. If a large proportion of visitors are spending less than one hour (as was the case here), it maybe an indicator that the venue is failing to adequately engage visitors.

Studies show that in cultural and heritage museums, exhibitions or events satisfaction levels can be enhanced through a greater level of involvement and engagement of visitors (de Rogas & Camarero 2006). This can, to a large extent, be achieved in the design stages of a centre as has been done at Brambuk through information panels, walkways, lighting and audio, which stimulate as well as create interest in the visitor. However, the emotional engagement of the visitor could be enhanced through a greater degree of personalisation through interaction and dialogue with visitors and hence a greater degree of emotional involvement. This could come in the form of cultural interpretations, descriptions and insights that cannot be gleaned from tangible displays. The time spent at the Centre can be an indicator of the Centre's ability to both cognitively and emotionally involve the visitor. A number of visitors commented on the need for interaction with indigenous staff, with comments such as: *"More indigenous staff roaming ready to explain things with their stories and experiences (bit like Australia zoo)."* Emotional involvement can lead to longer visits, with more time spent at the site, the shop and the café.

5.2   Pre-visit awareness and marketing:

The interview of 100 visitors in the main town centre found that 31% had not heard of Brambuk, the Aboriginal Culture Centre and / or the National Parks Tourist Centre. Only 24% had already visited the Centre at that visit and a further 24% were planning to visit at the current visit. However, a number of those were going to visit as a result of the interview, which had aroused their interest. This includes both domestic and overseas visitors. Only 20 % of those interviewed had visited the Centre at a previous visit and many of these were intending to visit again during the current visit.

The overall visitor awareness of the Centre (pre-visit) was poor. For people visiting the area for the first time only 41.4% of domestic and 43.6% of overseas visitors were aware of the Centre prior to their visit. This is because tourists normally visit a particular well known tourist destination which may provide a range of tourist attractions. The attractions then need to be marketed to capture the attention of the tourist while at the destination. All indications are that the general level of public awareness is relatively low for the State's premier indigenous cultural tourist centre. As stated previously, 31% of people interviewed in the township had not heard of the Centre (this is once they were already at the destination) and 58.6% of domestic and 56.4% of overseas visitors to the Centre had not heard about the Centre prior to arriving at the destination.

5.3   Pre-visit information sources:

Word-of-mouth was by far the most important and the most influential in the decision to visit, with 27.8% of all visitors citing "friends and relatives" as their major source of information. The second ranked on the "influence scale" and second most popular source were the "Roadside Signs", with 24.5% of the visitors identifying this as a source of information and influence on their decision to visit. For Overseas visitors, the most influential sources of information were "Travel Agents" (40%); "Guide Book" (21.5%); "Friends & Relatives" (15.4%) and "Tourist Information Centre" (7.7%). Other sources, including the "Internet" were only marginally utilised.

5.4   General satisfactions levels:

The overall levels of satisfaction experienced by visitors was very high, as is generally expected in leisure markets and especially in relation to public goods or free services. Some areas of concern for visitors were the ease with which visitors could get information and advice; the signage and labelling; the knowledge and accessibility of staff; and the opening hours.

5.5   Visitor expectations:

One of the objectives of any market oriented organisation is to meet customer expectations. Using the benchmarks (which were not strict) set in this analysis, it was found that visitor experiences fall short of expectations.

This analysis indicated that although the satisfaction levels were extremely high, in a large proportion of cases, visitor expectations were not met. For example, the earlier analysis of time spent at the Centre indicated that 50% of the visitors spent less than one hour at the Centre. In response to the statement, "I expected that the visit would take longer than it did", 134 (25.7%) visitors indicated that their expectation was not met and a further 173 (35%) were neutral. More than a third of all respondents (37.5%) either agreed or agreed strongly that there should be more educational emphasis in displays. Nearly a quarter (22.5%) of visitors were expecting a greater variety of displays and information and generally expected to see more at the Centre. Nevertheless, they were almost always satisfied with the visit and the level of enjoyment experienced from the visit was very high, in aggregate terms. An example of a comment reflecting that the Centre exceeded a visitor's expectations is *"I expected much less things then there is. I walked in and I was amazed."*

There were a number of suggestions offered by respondents in relation to displays and information that may explain the gaps between expectations and the actual experience. These comments are discussed in the body of the report and a full list is included in Appendix 11.

5.6   Visitor responses on Core Competencies:

Brambuk's core competencies are the provision of insights into indigenous culture and the provision of an understanding of indigenous history for the visiting public. From the visit one would expect that visitors would gain a better insight into indigenous culture. This was generally the case, as indicated by the mean score of 4.23 (5 maximum), with a large standard deviation of 0.818. It is important to note that 75 respondents were neutral (15%) and 12 were either in disagreement or strong disagreement (2.4%). Given that this item reflects the main purpose of the Centre, it may be important strategically to address why 17.4% of the respondents did not give a positive score. The answer may lie in the analysis of other service or product offerings, displays, activities, information, customer service and the like. This would also include individual characteristics, backgrounds and experiences, which influence their expectations.

_____

Similarly, with the item "I gained a better understanding of indigenous history" the mean score was 3.95 with a standard deviation of 0.851. There were 21 respondents who either disagreed or strong disagreed with this item (4.2%) and 113 (22.8%) were neutral. Therefore, one could conclude that 27% were not willing to give a positive score. From the point of view of visitor satisfaction and as explained in the literature section of this report, the visitor responses are generally skewed towards satisfaction. The purpose of studies of this type is to identify underlying discontent and address any hidden issues with respect to satisfaction and expectation.

Although our arbitrary benchmarks are met, the high neutral response should trigger managerial concern and evaluation of programs and offerings. There were a large number of comments received about the need for more displays, activities and information, indicating that expectations were relatively high creating a wider expectation-satisfaction gap. However, satisfaction levels with the visit were very positive in aggregate terms. How the programs, activities and displays address the key functional objectives and core competencies should be subjected to regular reviews and modernisation so that they remain effective in meeting changing visitor needs and expectations.

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APPENDICES

APPENDIX A: QUESTIONNAIRE

Brambuk: The National Park and Cultural Centre: Visitor Survey 2008

(The information provided here will be used for planning and research purposes only and treated as confidential.)

1. Is this your first visit to the Brambuk Cultural Centre?
    Yes   No   →   In which year was the previous visit _____

2. Are you part of a packaged tour   Yes   No

3. Are you an overseas visitor   No   → What is your postcode _____
    Yes   → Which country are you from _____

4. Are you: Male or   Female.

5. Age Group: Less than 15 years   15-19   20- 29   30-39   40-49   50-59   60+

6. How did you hear about or find out about the Cultural Centre? Tick all in the list that apply:

r Agents	ia (TV, Radio, etc)	e specify others below:
rnet	oring Guide Books	
chures in Parks	ds & Relatives	
dside Signs	l Knowledge	
le Books	ist Information Centre	

    Which would you say was most influential in your decision to come? _____

7. In order to continually improve the Centre and the Services, could you please indicate your level of satisfaction with the facilities:

l of satisfaction with items below – Please circle the number that you think best applies to the items below>	High					Low
al environment and atmosphere	6	5	4	3	2	1
ray things are presented and displayed	6	5	4	3	2	1
ase with which you could get more information & advice	6	5	4	3	2	1
gnage and labelling	6	5	4	3	2	1
nowledge & accessibility of staff	6	5	4	3	2	1
pening hours	6	5	4	3	2	1
ayout of the Centre, displays, shop & cafe	6	5	4	3	2	1
ultimedia presentations	6	5	4	3	2	1
arning and educational focus	6	5	4	3	2	1
is your overall satisfaction level with this visit?	6	5	4	3	2	1

8. Did you visit the following sections of the Centre:
    The Shop: Yes   No
    The café: Yes   No
    Garden (plants in walkways)   Yes   No
    The Brambuk Display Centre   Yes   No

9. How long was your overall visit to the Centre _____(hours & minutes)

10. How did you arrive at the Centre   By car   By tour bus   Other
Please continue over the page: ☺

11. Could you please indicate your level of agreement or disagreement for the following statements:

	Tick the most appropriate column that represents your rating of the following statements:	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1	Overall, this visit was very enjoyable	5	4	3	2	1
2	The Centre is well maintained and well organised	5	4	3	2	1
3	The displays and stands were informative	5	4	3	2	1
4	The staff were knowledgeable and friendly	5	4	3	2	1
5	I have learnt a lot on this visit	5	4	3	2	1
6	There should be more educational emphasis in displays	5	4	3	2	1
7	I took particular notice of plants along walkways	5	4	3	2	1
8	The shop should provide a wider range of indigenous items and crafts for sale	5	4	3	2	1
9	I expected a greater variety of displays & information	5	4	3	2	1
10	I expected that the visit would take longer than it did	5	4	3	2	1
11	I would feel comfortable in recommending this Centre to others	5	4	3	2	1
12	I gained a better insight into indigenous culture	5	4	3	2	1
13	The service overall was of a high standard	5	4	3	2	1
14	I had no difficulty with access to the various parts of the Centre	5	4	3	2	1
15	The Centre was easy to find	5	4	3	2	1
16	This is one of the best Cultural Centres I have visited	5	4	3	2	1
17	I expected to see more than I did at this Centre	5	4	3	2	1
18	I gained a better understanding of indigenous history	5	4	3	2	1
19	I was able to get enough printed information to take home	5	4	3	2	1
20	The displays adequately met my needs	5	4	3	2	1

	Please Tick Yes or No for the statements below	YES	NO
21	Did you purchase items from the shop		
22	Did you purchase items from the cafe		
23	Did you have any difficulty finding a car park		
24	The signage and direction signs were clear and adequate		
25	I had heard of the Centre before my visit to this area		

12. Could you please provide us with some of your ideas to improve this Cultural Centre: (Any Comments):

_____
_____
_____
_____
_____
_____

Thank you for your help in contributing to the future improvements of the services provided by the Brambuk Cultural Centre. For a draw in the prize you should complete details below: (this will be confidential and not used for any other purpose).

Name:_____Email:_____
Address*:_____
_____Phone Contact:_____
*(Full postal address – winner notified and goods mailed).

APPENDIX 2: PHOTOGRAPHS

Picture 1: Entrance to the new Tourist Information Centre, incorporating café and shop.
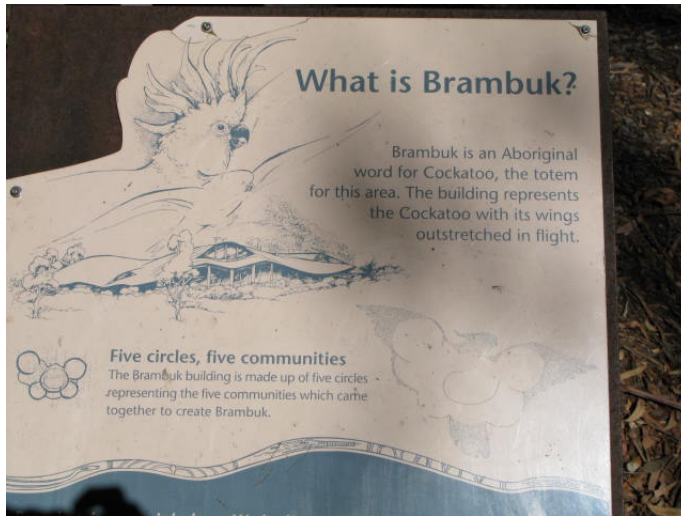This picture have been sourced from the Brambuk website

Picture 2: Brambuk – well hidden from view
Visitors are following tract to the Centre. This is the view of the building that visitors get.

Picture 3: This is the original (front) entrance to Brambuk, now not in use.

This is a close up picture. Visitors do not get this prespective.

Picture 4: What is Brambuk?

Picture 5: Main visitor information counter: note limited service area.

Picture 6: Entrance to the Shop

Picture 7: New Information displays.

Picture 8: Entrance to Cafe

Picture 9: Outdoor displays

Picture 10: Rear view of new buildings and outdoor café seating

Picture 11: View of Brambuk – The Centre is well hidden from view.

Picture 12: The current entrance to Brambuk

Picture 13: Pathway to Brambuk.
Plaques describing indigenous plants that have since died and have not been replaced.

DBA Research Project 3

Werribee Mansion Visitor Satisfaction Study

June 2010

Shameem Ali

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PART 1

Introduction and Overview

1.1 Study goals

The purpose of this project is to facilitate the development of a marketing strategy plan for Werribee Park that can be implemented during 2010. In order to develop a plan that is conducive to effective and cost sensitive implementation, a number of research objectives are proposed. The research objectives are grounded in the recognition that any marketing strategy plan should be informed about all three segments of the tourism market: those who have visited, those who are aware yet choose not to visit and those who are unaware of the destination. This scope of this study is limited study to investigating the satisfaction experienced by visitors and their likes and dislikes about the venue.

To this end, the research objectives of this study are:

- To evaluate the prevailing "awareness and depth of knowledge" of Werribee Park and the Mansion in the context of the tourist precinct.
- To provide insights into the satisfaction levels and experiences of visitors to Werribee Park and the Mansion.

1.2 Research Strategy and Methodology

The methodology included quantitative and qualitative analysis. The key study themes were visitor satisfaction, visitor experiences and community awareness.

Visitor Satisfaction:

Visitor Satisfaction was measured using an on-site survey and data was collected using a Visitor Survey questionnaire, which is attached in Appendix 3. The questionnaire included questions relating to:

Attractions visited during the visit

Expectations and satisfaction achieved

Time spent

Information sources used

Use of services and facilities

Visitor groupings

Likelihood of revisiting and recommending

Visitor profiles and comments

The survey consisted mostly of questions requiring a yes/no answer and some questions, using Likert scale statements, measuring satisfaction and attitude toward Werribee Park features. In addition, visitors were given the opportunity to suggest improvement that could be made. Data collection, using self-completion survey forms, took place on the grounds of Werribee Park from February to April 2010. This is considered the peak visitation time for Werribee Park. Data collectors were on-site and a poster was placed at the entrance to encourage participation. A box was placed at the exit to deposit the completed forms. A useable sample of 436 visitors was obtained.

1.3   Visitor Trends

During 2003 and 2004 peak visitor numbers of just over 61,000 was achieved and had been declining since that time to be about 47,000 in 2009. This is shown in Figure 1.1.
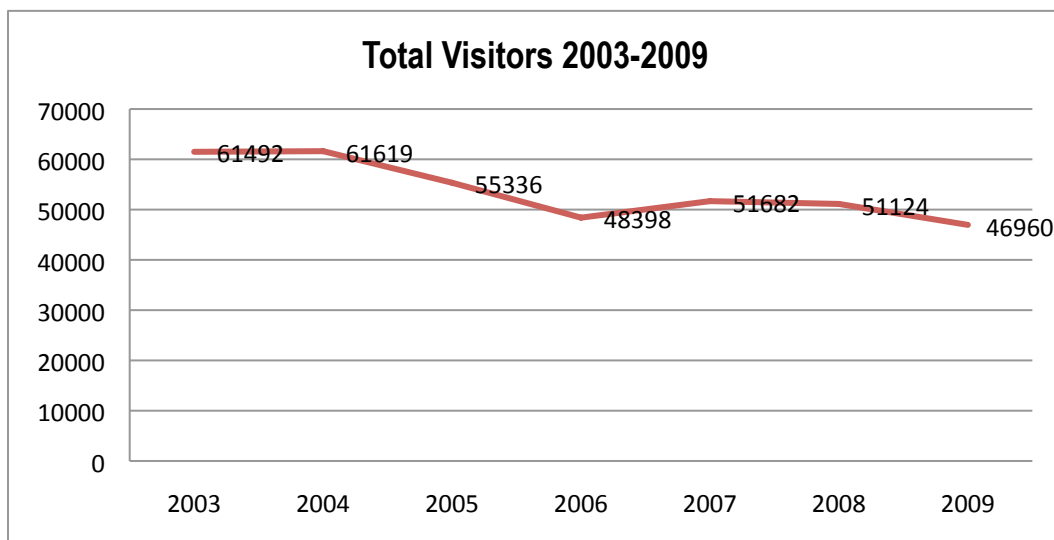

Figure 1.1: Number of Visitors to Werribee Park Mansion

(Source: Werribee Park Visitor Monitor)

An examination of visitation by months highlights the peak periods. Visitation is high in January during the summer holiday period but drops substantially in February, as presented in Figure 1.2, perhaps coinciding with the return to work or school. Visitation

rises during March and April, possibly due to the last days of nice weather and the Easter holiday period. Visitation is low during the winter months and rises steadily as the weather warms up. Seasonal changes appear to be a key factor in visits. Products and services should be developed that can be enjoyed by visitors during the cooler months to encourage full utilisation of the facilities.
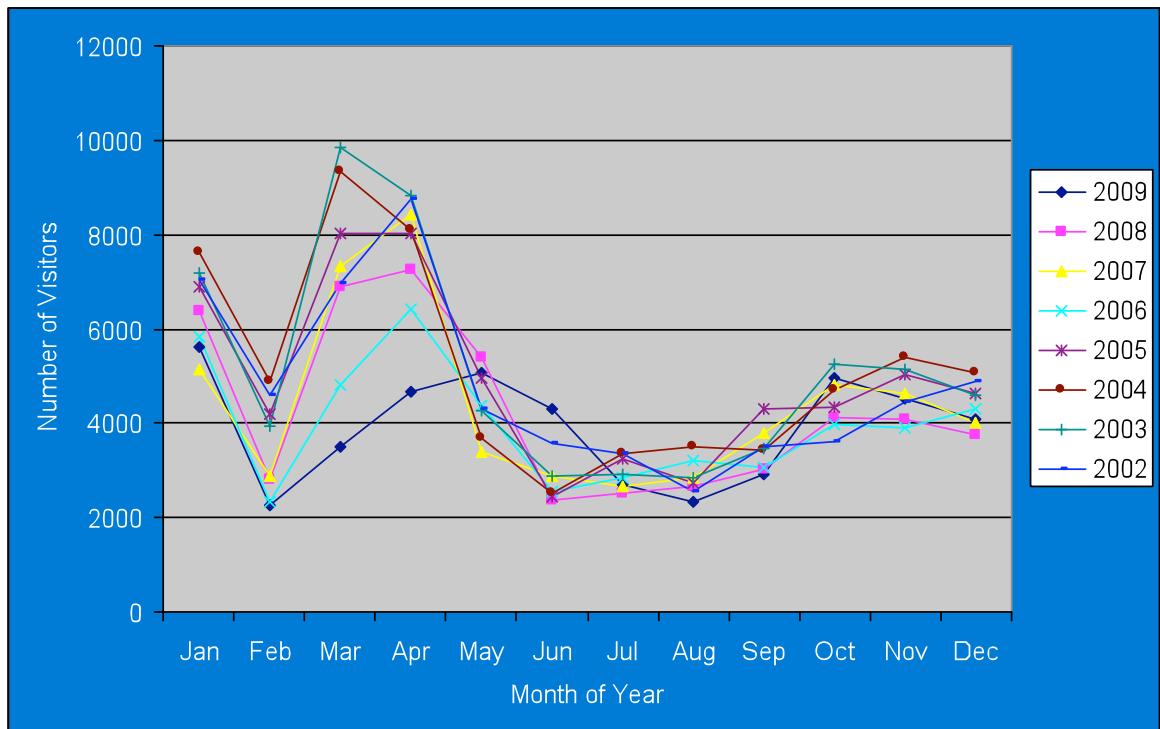

Figure 1.2: Number of Visitors to Werribee Park by Month

Entry to the property will became free on July 1st, in line with all Parks Victoria properties. This initiative is to encourage families to outdoor leisure pursuits, especially in open area parks and gardens. It remains unclear at this stage as to how visitations to the Mansion, as distinct from the parkland, will be managed with respect to free and open visitation. The core historical and tourism value of the Mansion arises from restoration and maintenance of this important part of Melbourne's heritage. It is important to strike a balance between the need to properly maintain these sites of significance, and any policies relating to free access.

Below we take a closer look at the **Victorian** visitor numbers

Table 1.1: Trends in Annual Victorian Visitors

	2005	2006	2007	2008	2009
Metro East	6674	7755	6797	7235	5336
Metro West	9695	10302	10547	13163	9531
Metro North	3038	3280	3707	3922	2511
Metro South	3824	3443	3801	3866	2861
Metro Central	12105	9443	7685	7146	3518
Total Metro	35336	34223	32537	35332	23757
Country Victoria	6129	6591	6796	5871	5360
Total Victorian	41465	40814	39333	41203	29117

During 2009, 82% of Victorian visitors were from metropolitan Melbourne and the remaining 18% were from country Victoria. While a third the Victorian visitors in 2009 were from the west of Melbourne, the general trend is of declining numbers across all regions of Melbourne between the 2008 and 2009 period. Country visitors declined only marginally compared to other regions during this period.
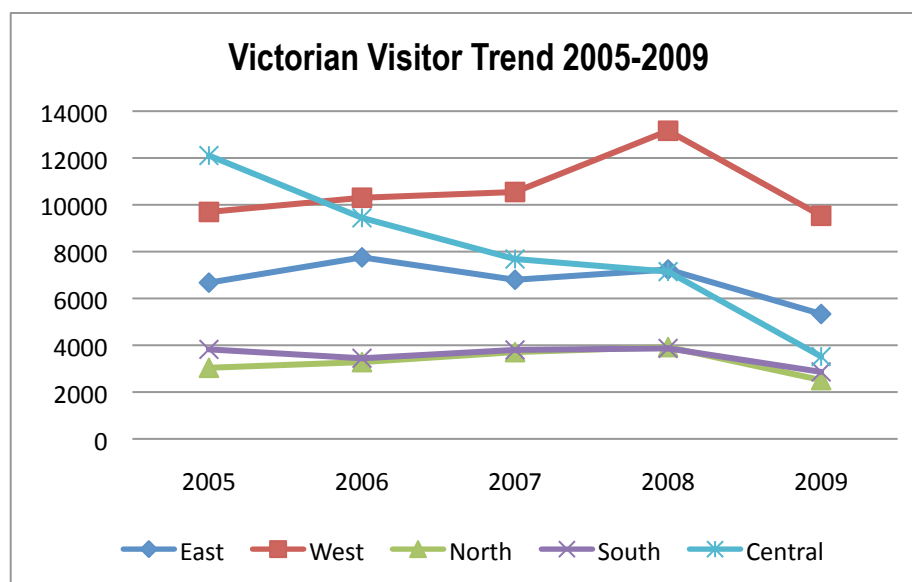

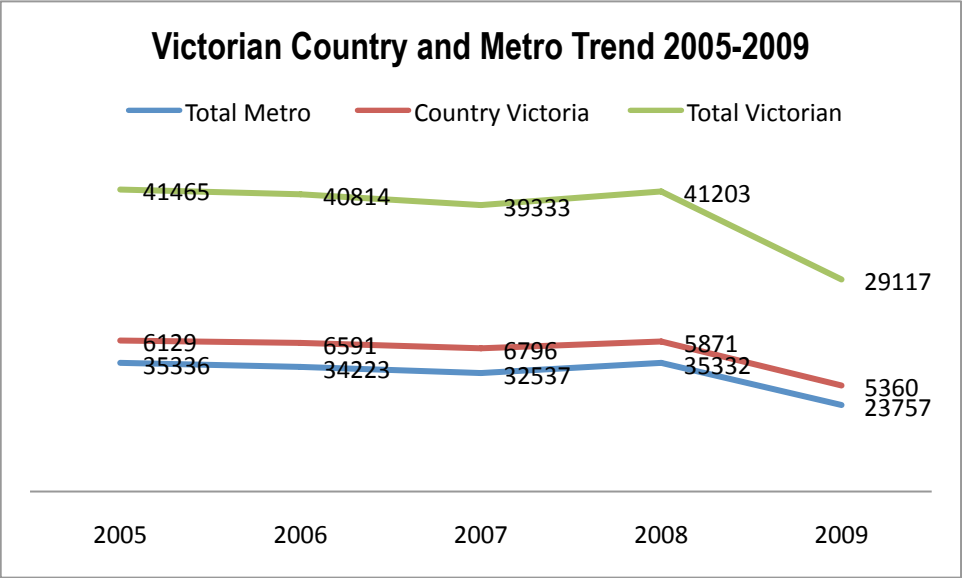Figure 1.3 Victorian Metropolitan Visitor Trends

Figure 1.4 Victorian Metropolitan and Country Visitor Trends
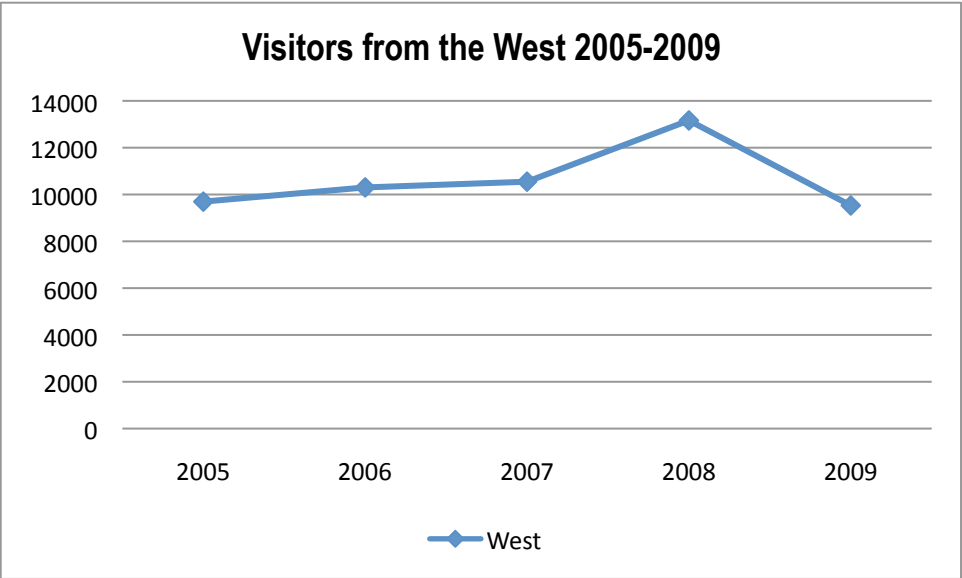

Figure 1.5 Visitors from Metropolitan West

The proportion of overseas visitors has been declining since 2006, falling from 2581 in that year to 723 by 2009.
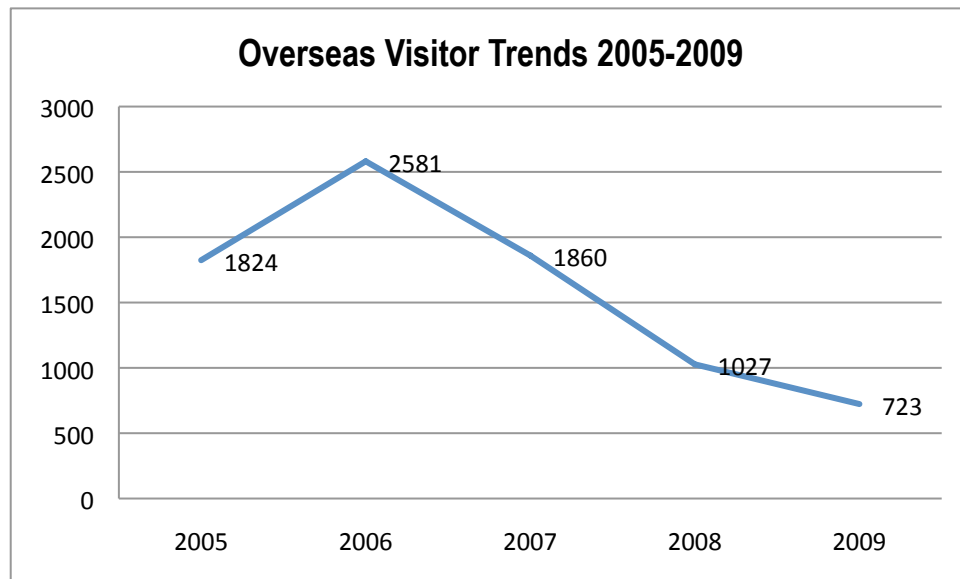
Figure 1.6 Overseas Visitor Trends

Visitor Numbers January – June 2010

Where did the Metropolitan Melbourne visitors come from?

Table 1.2 Metropolitan visitor origins - 2010

Origin	Jan	Feb	Mar	Apr	May	Jun	Total	% Total
EAST	814	285	254	626	301	145	2425	19%
WEST	1674	615	747	1377	964	432	5809	45%
NORTH	394	119	364	231	158	106	1372	11%
SOUTH	376	238	135	275	176	91	1291	10%
CENTRAL	384	328	413	368	234	293	2020	15%
Metro								
Total	3642	1585	1913	2877	1833	1067	12917	100%

The general trend is for peak visitation during the holiday periods between January and Easter holidays. Table 1.2 presents the number of visitors from the various parts of Melbourne in the period January to June 2010. The west and central Melbourne accounted for 60% of visitors and may indicate that distance is an important consideration when visiting such attractions. The fact that the west accounted for 45% of

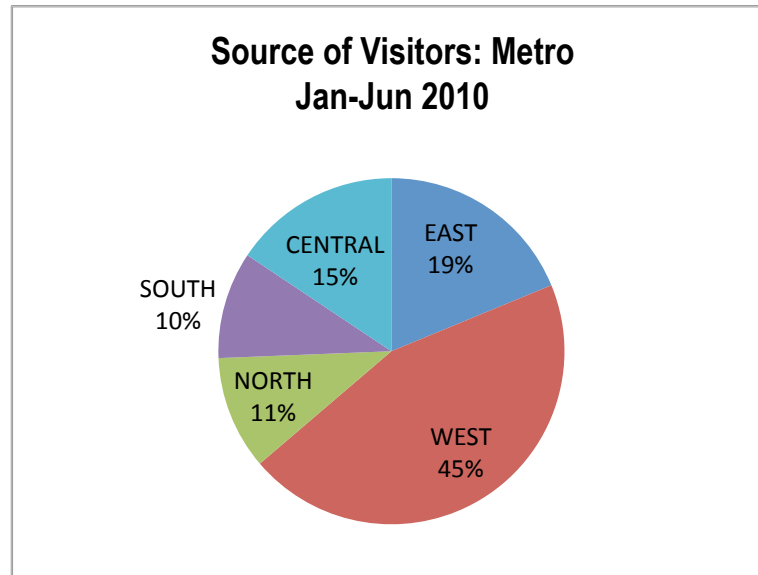visitors during this period may be because Werribee Park is "local" to the people from the west of Melbourne.

Figure 1.7: Origin of Metropolitan Visitors - 2010

1.4   Tourism Trends

Reports commissioned by Parks Victoria over the last few years indicate that there is strong support in the community for the preservation of heritage buildings for future generations. The majority of Victorians also support an entrance fee for significant sites such as the Mansion and strongly support the notion that adequate resources should be allocated for heritage sites. Over the last decade or so there appears to be a clear shift towards re-linking with our past, exemplified by the way in which the young have embraced the reconnecting with the ANZAC traditions, with most people seeking for the sense of history and heritage.

Historical or heritage buildings, sites or monuments had the highest rate of attendance by international cultural and heritage visitors (61%), followed by Museums or art galleries (57%).

- Visiting museums or art galleries was the most popular cultural activity for domestic overnight visitors, with 44% attending, compared to 35% of domestic day visitors (Australian Bureau of Statistics 2009).

- Visits to historical/heritage buildings, sites or monuments attracted 30% of overnight visitors and 24% of day visitors.
- Other popular venues included Zoological parks and aquariums (an attendance rate of 36%), Local, state and national libraries (34%) and Botanic gardens (34%).
- Between 1998-99 and 2003-04, total household expenditure on culture increased from $26.74 to $36.40 per week (ABS, 2009).

In the period between 2008 and 2009, the tourism industry in Australia, like many other industries, had been affected by the global financial crisis. The tourism and entertainment industries are substantially influenced by a downturn in economic conditions. This downturn may have contributed to the lower Werribee Park visitation and somewhat flattened the peaks that normally occur during the main holiday periods (see Figures 1.1 and 1.8). However, there has been a persistent downward trend over a number of years that cannot be explained in economic terms and may be associated with a range of factors such as competitive pressures from other accessible destinations and the growing prosperity created by high rates of economic growth.

With 'Baby Bombers' representing the largest age group of Australians (ABS, 2010), this can be a viewed as an opportunity for Werribee Park as they comprise a significant proposition of the "Passive Users" segment identified in the following section.

1.5   Findings from Previous Studies

1.5.1   Awareness

Parks Victoria has commissioned visitor and market research studies that related to Werribee Park, despite the fact that Werribee Park is unlike many of the parks under the control of Parks Victoria. One that is directly relevant to Werribee Park is the 2002 study by Millward Brown titled "Werribee Park & Marine and Coastal Parks 2002 – Final Report". The key findings of this study are summarised below:

- 86% of Victorian residents were aware of Werribee Park.
- Awareness was the highest amongst western suburbs residents, females and people aged 50 years and over.

- 92% of those 50 years and over were aware of Werribee Park and 62% of these visited.

- 80% of singles were aware of Werribee Park and 51% of these visited.

- 69% of those in the 16 to 24 age group were aware of Werribee Park and 42% visited.

- 55% of those aware had visited Werribee Park.

- Those who were 50 years and over were more likely to have visited.

In relation to awareness of attractions at Werribee Park, the Millward Brown (2002) study found that:

- The awareness of Victoria's Open Range Zoo was 89%

- Werribee Mansion 80%

- Historic Gardens 62% and

- Werribee Park Picnic Area 56%.

1.5.2   Park Visitor Segments

Parks Victoria identified park visitor segments based on 34 major parks in metropolitan Melbourne and around Victoria including well know parks such as Albert Park, Jells Parks and national parks such as Mornington Peninsula, Wilsons Promontory and Grampians. The following segments were identified (Zanon, 2005, Roy Morgan, 2010):

1.   **Urban Socials**, which comprise 26% of all visitors and are Melburnians on a day trip from home visiting an urban park. They account for about 55% of visitors to urban and metropolitan parks, but make up only 25% of visitors to urban fringe parks. Urban Socials tend to expect quality facilities and amenities but want value for money. They tend to be price sensitive.

   - Their level of satisfaction is influenced mainly by the quality of recreation facilities.
   - They visit in groups, with family, friends or children
   - Reason for visit: social event, meal, picnic

2.   **Nature Admirers**, also comprise 26% of all visitors, but make up only about 10% of visitors to urban and metropolitan parks. Their main preferences are Country Victoria Parks (where they make up 42% of visitors) and Protected Area Parks, National Parks and State Parks (where they make up about 38% of

visitors). The fact that they comprise 28% of the market for Urban Fringe Parks places them as a significant market for Werribee Park. They enjoy scenery, plants and animals. This group tends to be more price sensitive with practical needs.

- Their level of satisfaction is unlikely to be influenced by services and amenities
- Reason for visit: sightseeing and touring

3. **Trail Users** comprise 14% of all Parks Victoria visitors. They tend to be socially aware and environmentally conscious. They come in smaller groups of 1 or 2 people, but are likely to come often

- Their level of satisfaction is unlikely to be influenced by services and amenities
- Reason for visit: use trails for walking or cycling

4. **Passive and Other Users** comprise 9% of all parks Visitors. They enjoy the more peaceful aspects of the venue and are motivated by relaxing, slow pace and stress free environments. They closely associate leisure with relaxation and unwinding in a natural setting, involving low energy. They tend to be more conservative in the middle-age to older group. While practical when it comes to need satisfaction, they tend not to be price sensitive.

- Their level of satisfaction is influenced by services and amenities that enhance relaxation
- Reason for visit: combining sightseeing with relaxing

5. **Activity Centrics** comprise 9% of all Parks Victoria visitors and are mainly young singles specifically seeking water base and other physical activity. They are not a target market for Werribee Park.

- Their satisfaction is most influenced by Park accessibility, condition of tracks, car parking and signage.
- Reason for visit: physical activity

6. **Access Made Easy** segment accounts for 8% of all Parks Victoria visitors and tend to be older and mature singles. They make up about 9% of Urban Fringe Park visitors and about 6% of Metropolitan Park visitors. Their expectation is that park facilities should be easily accessible to them. They are likely to be older than middle aged.

- Their satisfaction level is influenced by accessibility to services. They tend to have high expectations that services and amenities will meet their needs.
- Reason for visit: Sightseeing and socialising

7. **Country Vacationers** comprise 8% of all Parks visitors and tend to travel further and stay longer, mainly in National Parks. However, when visiting they tend to undertake sightseeing and other holiday activities. They tend to visit less often but travel further and like to spend a weekend away.

- Their satisfaction is influenced by the availability and accessibility to recreation facilities
- Reason for visit: holidaying and sightseeing.

1.5.3   Perceptions of Heritage

The "Community Perceptions of Heritage Management" Study (Market Solutions 2009) found that the key reasons for visiting heritage places were to "experience the natural environment, old buildings or architecture", and to gain a greater understanding of history from experiencing authentic places (96%). This defines well why people would visit Werribee Park. More specifically, in visiting heritage places people are "looking to learn" about history (57%), gaining a sense of history, heritage and culture (33%), education or understanding of the past (29%) and entertainment (16%). This study also found that:

- The criteria for determining satisfaction with historical places were the overall condition and cleanliness of facilities (28%) and the historical accuracy (23%)
- 36% of the people actually looked for specific information about the heritage destination prior to visiting, with the internet making up the major source.
- The heritage sites most commonly visited were Werribee Park/Mansion (13% of respondents visited) and Botanical Gardens in Melbourne (10%).
- There was almost unanimous support for the need to preserve Victoria's heritage for future generations (99%).
- A majority of respondents (76%) agreed that popular places should have an entrance fee so that funds could be used for the upkeep of les popular sites.
- Respondents indicated that heritage sites should be promoted and that detailed information regarding the sites should be made available.

- The major impediments to visiting were: expense (27%), distance to travel (18%) and lack of time (17%).

PART 2

Visitor Profile and Visitor Satisfaction

2.1   Visitor Profile

2.1.1   Sample Profile

There were 436 usable survey forms collected, 66% of which were completed by females
and 34% by male visitors. The sample achieved a good distribution of visitors from the
various age groups, comprising 19% under the age of 30, 25.5% between 30 and 39,
20.6% between 40 and 49, 18.8% between 50 and 59 and 15.8% over 60 years of age.
The age of visitors is predominantly over the age of 30.
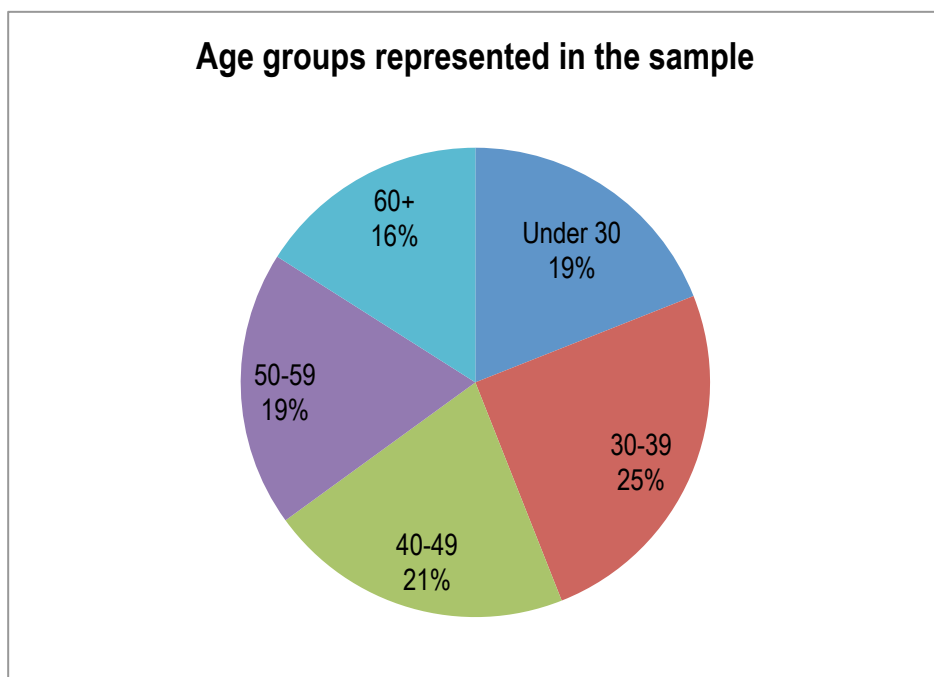
Figure 2.1: Age of Visitors

The sample contained a fairly even split between first time visitors (52%) and repeat
visitors (48%). As repeat visitation is seen within the sector as critical, the more or less
even distribution within the survey between these two groups will enable the analysis
process to uncover any distinctions that may exist between these groups. The majority of
repeat visitors were last at the Park less than a year ago (36%), these consisted of 75%
who were from the Melbourne's West.

When was the previous visit?

- More than 20 years ago 13%
- 11 to 20 years ago 13%
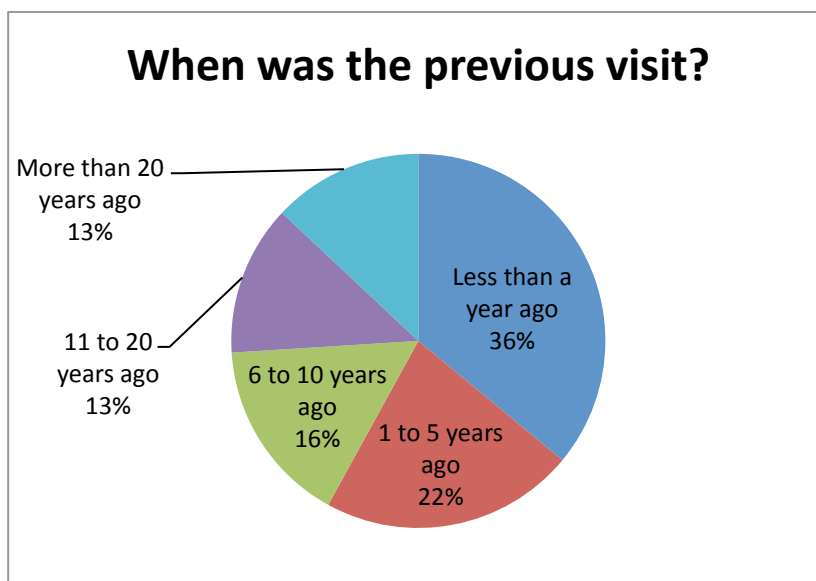- 6 to 10 years ago 16%
- 1 to 5 years ago 22%
- Less than a year ago 36%

Figure 2.2: Previous Visit

2.1.2 Where Did the Visitors Come From?

As expected, the majority of visitors were from Australia (91%), but there were a significant number from overseas (9%). The countries most represented by the overseas visitors were (n= 38): United Kingdom (26%), USA (11%), Canada (5%), New Zealand, (5%), Mexico (5%), Taiwan (5%), Malaysia (5%). The majority of visitors were from Victoria (89%), followed by Queensland (4%), New South Wales (4%), Western Australia (2%), South Australia (1%) and Tasmania (1%).

Local visitors

A significant proportion of the Victorian visitors came from Werribee (15%) and the surrounding areas of Hoppers Crossing and Tarneit (8%). This indicates that the local catchment is of significance and may be accounted for by the rapid urban sprawl surrounding the precinct, which has made these attractions more accessible. As development continues in the surrounding areas it may deliver a ready market opportunity. These figures indicate that almost of quarter of the visiting population is from suburbs adjacent to the Werribee Park/Werribee Mansion precinct. This is an encouraging sign and is a clear indication that localised publicity may deliver handsome

returns. A quote from a young local visitor who was showing her friend from Mexico around is indicative of this potential:

"I have lived here for nearly six years and didn't realise that this was in my back yard."

Victorian Visitors

There was an overrepresentation of visitors who originated from the western suburbs of Melbourne. Figure 2.3 shows the proportion of the Victorian visitors coming from the various regions comprised residents of the Western suburbs (43%), Victorian country and outer suburbs (17%), South Eastern suburbs (16%), Eastern suburbs (11%), Northern suburbs (10%), Mornington peninsula (2%) and Central Melbourne (1%). This tends to indicate that some marketing effort may be required to entice residents from the eastern suburbs, for whom there is a wider range of destination options available.
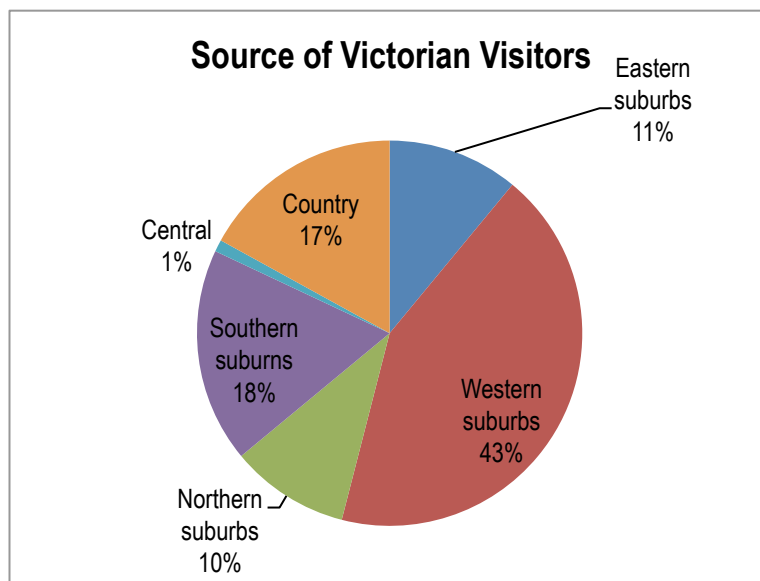

Figure 2.3: Geographic Location of Victorian Visitors

Victorian Country Visitors (Country Vacationer Segment)
- 85% of country visitors came specifically to visit the Mansion
- High users of 'Park notes' with 73% accessing these during their visit
- 53% were first time visitors
- 93% of all country visitors went to the Mansion
- They visited 4 or 5 attractions during their visit

- 20% of country visitors also went to the Shadowfax winery
- 15% were guests at the Mansion Hotel

Victorian Country Visitors

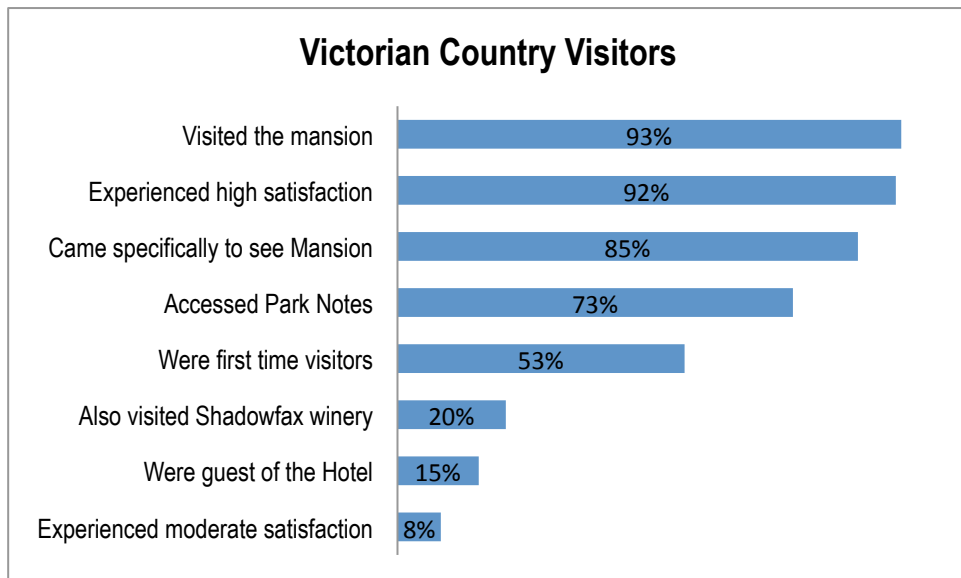|	
Visited the mansion	93%
Experienced high satisfaction	92%
Came specifically to see Mansion	85%
Accessed Park Notes	73%
Were first time visitors	53%
Also visited Shadowfax winery	20%
Were guest of the Hotel	15%
Experienced moderate satisfaction	8%

Figure 2.4: Country Visitors – Attractions Visited

A high level of overall satisfaction was experienced by 92% of the country visitors and the remaining were moderately satisfied. Most comments highlighted the very positive experiences of visitors, but in tourism studies this is generally the norm. Therefore, any negative views or connotations need to be examined carefully, as they may indicate need for improvement. For example comments such as:

> *"Attitude of the young women serving in the café needs improvement, as all other staff were lovely",*

may signal the need for staff training, especially as this is reflected in a few instances.

Overseas Visitors:

Overseas visitors represented 9% of all visitors. The countries most represented by the overseas visitors were (n= 38): United Kingdom (26%), USA (11%), Canada (5%), New Zealand, (5%), Mexico (5%), Taiwan (5%), Malaysia (5%).

- Many of them became aware of the offerings from friends and acquaintances (57%) and relatives (14%). This may be an indication "visiting friends and relatives" could comprise a potentially important segment.
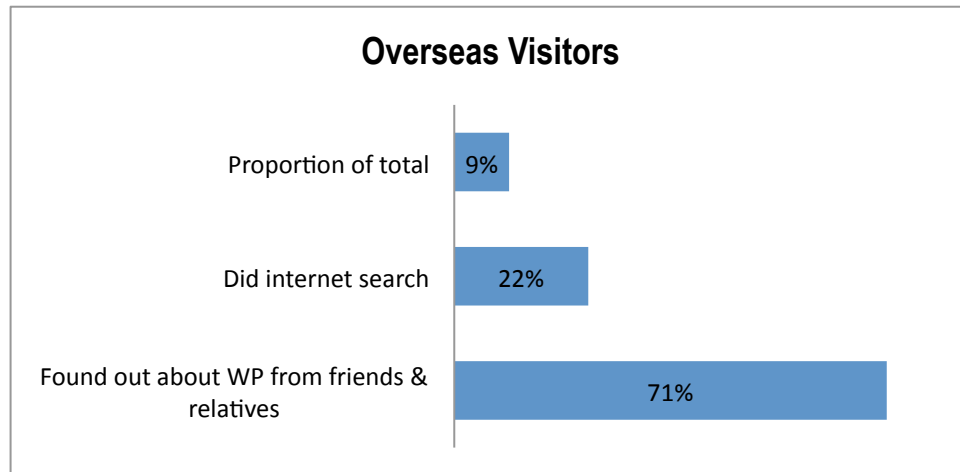- Internet search was high amongst this group at 22%.

Figure 2.5: How overseas Visitors found out about Werribee Park?

Most overseas visitors were impressed with the "beauty" of the place, the "amount of things to see" and found the visit relaxing and enjoyable. Some areas for improvements are reflected in the following comments:

> *"The gardens are absolutely beautiful. The café and the gift shop are a tad cramped. Mid-range lunch menu".*
> *"Guided tours would be nice".*
> *"Greater number of sculptures and more garden maintenance required on sculpture walk."*

2.1.3   Composition of Visitor Groups

The visitors to Werribee Park generally align with "Passive Users" and "Urban Socials" segments as identified by Parks Victoria.

- 74% comprised groups of one or more adults and no children
- 26% had children in the group
- 19% has one or two children
- 7% had three or more children
- Where the visiting party consisted of two adults, 82% did not have any children with them.

2.1.4 Principle Reason for the Visit

Respondents were asked to identify if their visit to Werribee Park was specifically for the purpose of visiting the Mansion. Werribee Park offers a range of attractions, such as the Zoo, which is relatively well known and may be the key attractor of tourists to the precinct.

- 66% of the visitors indicated that the Mansion was the prime purpose for their visit. In about a third of the cases the Mansion was not the main reason for coming, respondents were asked to state the reasons for coming to the area, and the most commonly occurring of these were:
  - Park, gardens and or rose gardens (32)
  - Hotel (17)
  - Picnic (12)
  - Safari Zoo (12)
  - Sculpture (3)

(Note: numbers in brackets indicate raw numbers, not percentages)

These give some indication of what attracts visitors to this precinct, other than the Mansion. Other reasons mentioned were: winery, horse event, photography, mothers' group and restaurant. A few of the respondents were merely passing by.

Fifteen percent of visitors considered other attractions or activities as the day's outing options considered include: zoo (19%), beach (9%), shopping (6%), various parks including Ripponlea and Hanging rock (11%), winery (3%), library (3%), Mornington peninsula, watching movies at home, and aquarium.

2.1.5 Length of Stay: Expected and Actual

Although the length of stay at a particular destination is dependent of a range of circumstances such as personal situation and weather, it is also an indicator of the capacity of the destination to engage a visitor. Some visitors could complete their visit of the Mansion, for example, in 30 minutes while others may spend several hours. This would depend on the interest of the visitor but from the tourism provider's point of view it is important to deliver value that will engage the visitor for a maximum period of time. This also has pricing implications.

- The average time spent at Werribee Park was 3.15 hours (n=370). This excludes hotel guests and visitors who did not answer this question.

- Visitors expected, on average, to spend approximately 2.11 hours at Werribee Park (n=419). When guest from the Hotel are included in the sample the average time is 3.2 hours (n=436).

- On average, visitors spent 30 minutes more than they expected. Breaking down the time into categories 37.6% spent up to two hours and a further 30.5% spent between two and three hours at the precinct. The comparison between what time visitors expected to spend and what time they actually spent at the destination is shown in Figure 2.6.
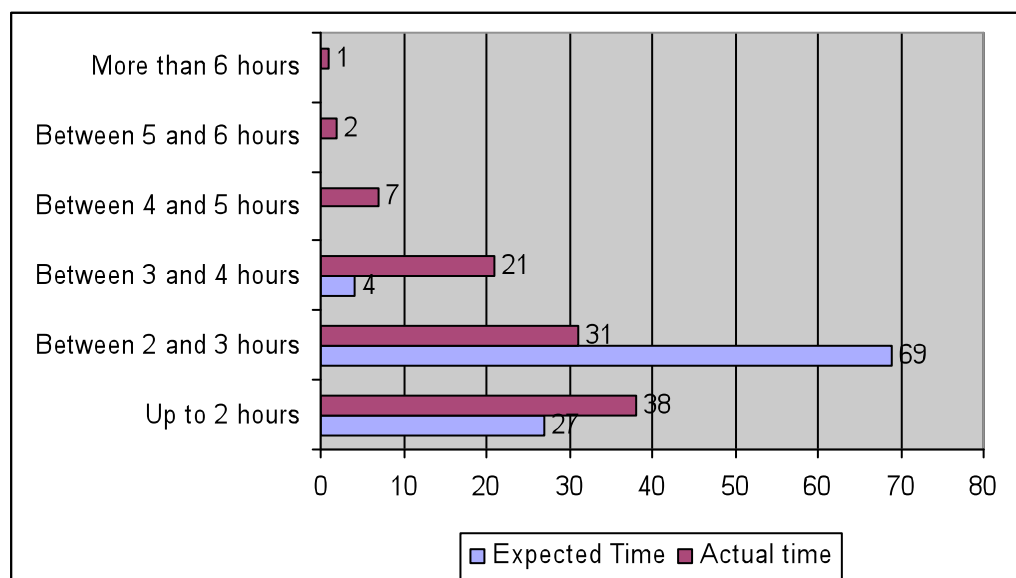
Figure 2.6: Expected and Actual Time Spent at Werribee Park

There is a significant difference between the time visitors expected to spend and the time actually spent. For example, 75% of those who expected to spend up to two hours actually did spend that time. However, the remaining 25% actually spent more time, some spending three times more than they expected. From those that expected to spend between 2 and 3 hours, 25% spent less and 38% spent more time. From those that expected to spend between 3 and 4 hours, there were 67% that spent more time.

This mismatch is significant and has implications for the future marketing programs, as it appears that as a general rule people are spending more time there then that initially expected to spend. While this is a positive sign about what the destination has to offer, it

is clearly also a sign that there is a failure to explain the range of tourism products and services that are available at this destination. Visitors do not appear to be aware of exactly what is on offer, which can lead to issues of visit planning. These issues will be discussed further elsewhere in this report, in the sections dealing with awareness, as well as in the section that follows.

2.1.6   Number of attractions visited

- The mansion, the rose garden, the sculpture walk and the laundry are by far the most popular attractions as they are the main targets for visitors.
- Visits to the Tower are lower in number and is related to the extra charge involve and the restrictive tour times.
- The number of attractions visited is time dependent as is the time spent at each destination and it appears that the optimum may be between 3 and 4 attractions.
- The study shows that 30% visited only one or two attractions, 38% visited three or four, 22% visited five or six and 10% visited seven or more attractions during the one visit.
- 73% expect that they will visit again in the next five years.

2.1.7   Facilities Used

- 65% collected 'Park notes'
- 57% made purchases from the cafe
- 17% made gift shop purchases
- 10% participated in audio tour
- 9% participated in personally guided tours

The audio tour which involves carrying a mobile listening devise, similar to a large mobile telephone can be hired at an additional cost of $4 per unit. The tower tour involves a guide and provides access to "restricted areas" and also covers part of the Mansion. This can be purchased at an additional cost of $4 per person. "Park Notes" which are A4 printed notes about various attractions were accessed by 65% of visitors and are available free of charge. The access rate for the 'paying' options were relatively low given that the "story" and the history of the Mansion and for that matter the Werribee Park estate is central to the experience that is being "sold". It may be that visitors do not deem it as essential or are cost sensitive and believe that they are unlikely

to get value from them. Whatever the reason, the service provided must determine how important these components are to the total service and how they will enhance the visitor experience.

2.2   The Visitors from the West

The visitor satisfaction survey conducted at Werribee Park found that a significant numbers of visitors were from the western suburbs of metropolitan Melbourne. This was an unexpected finding as previous anecdotal evidence indicated that most of the visitors were from other regions of Melbourne. This view was supported by the notion that people tend not to frequent destinations that is of close proximity. In a sample of 436 visitors, 43% of the Victorian and 23% of all visitors were from the western part of Melbourne, and formed by far the largest cohort as shown in Figure 2.3. This section will examine this cohort of visitors and where appropriate make comparisons with those from other parts of the metropolitan area.

Almost 62% identified the Mansion as the main reason for visiting Werribee Park. Where the Mansion was not the main attractor to the precinct, the visitors gave the following alternative reasons (the instances are shown in brackets represent raw numbers):

- Rose garden / garden / park (15)
- Picnic (4)
- Hotel and related services (3)
- Zoo (2)
- Photography (2)
- Restaurant (2)
- Sculpture (1)
- Other (2) – mums group, wedding planning

There were 39 cases were the Mansion was not the main reason, and 31 alternative reasons were provided as listed above.

- 82% of those visitors from the West had visited Werribee Park previously.

- 18% of those from the West were first time visitors
- 15% had already visited earlier this year and an additional 46% had been here between 2007 and 2009.

All except one of the visitors from the west stated that they would visit again within the next five years. While 64% of the visitors from the west made purchases from the café, only 17% made any purchase from the gift shop. However, 55% collected the "park notes" during their tour and 9% were guests at the Mansion Hotel. The most popular attractions, based on the proportions of people visiting, were as follows:

The Mansion	83%
The Rose Garden	68%
The Sculpture Walk	52%
The Laundry	45%
The Farm	39%
The River	37%
The Tower	16% (additional cost involved)

"Tower access too restrictive – times / tours and $4 charge excessive"
"Shouldn't have to pay extra for anything else e.g. tower tour".

For a number of these visitors the total visit was under 2 hours (40%) and for nearly half of the visitors the visit was between two and four hours, while in 11% of cases it was more than 4 hours. The median number of attractions visited per visit is 3 attractions.

In the case of those from the Western suburbs, knowledge and awareness of the offerings came mainly from local knowledge (55%), previous visits (45%), friends and acquaintances (25%) and relatives (19%).

2.3   Information Sources for Werribee Park (all visitors)

Figure 2.7 shows the information sources used by visitors. In the case of all visitor segments, the main sources of information for Werribee Park are:

- local knowledge (32%),
- friends & acquaintances (31%),
- previous visit (30%) and
- relatives (15%).
- the Internet (15%) was also a popular way to seek information about Werribee Park.
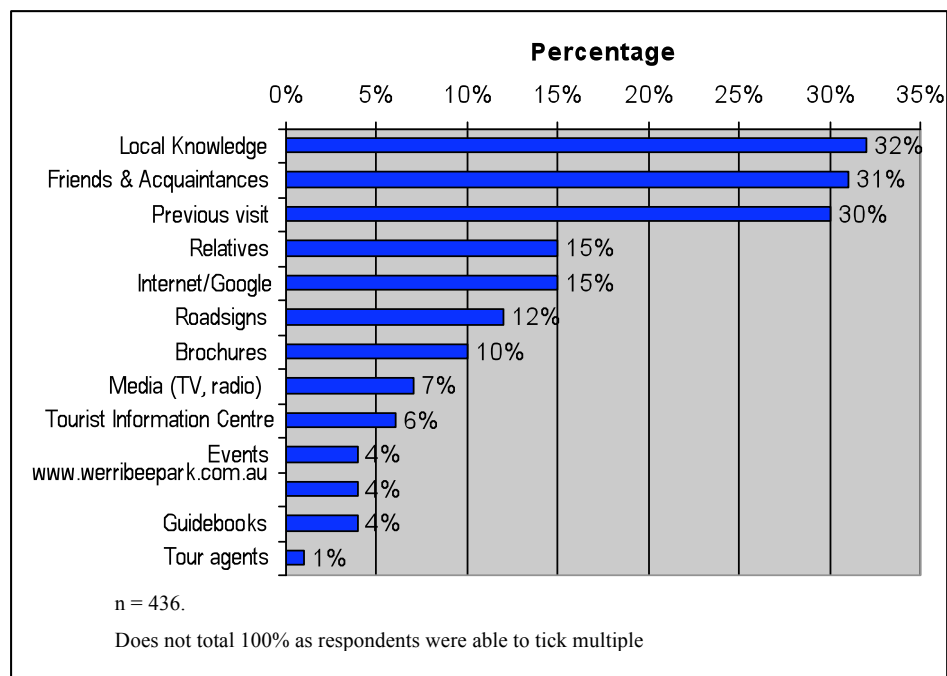
Figure 2.7: Sources of Information

As is the case with many experience-based products and services in leisure markets, word-of-mouth is critical for moving individuals along the awareness path towards interest generation and involvement. There is generally a reliance on more than one source of information and it may be assumed that the depth of knowledge and awareness increases as exposure sources and frequency increases. Sources such as friends and acquaintances and general local knowledge may be classified as first order sources and the internet would be classified as a second order source, in that search on the internet only comes after some "interest" has been created.

One of the challenges faced by marketing agencies is how to use the internet as a 'first order' source of information and to determine if this is appropriate. In some segments, such as the young, there is scope for designing an integrated internet based strategy that has the capacity to move internet based activity into a first order source of information for tourism destinations.

In summary, it is not surprising that *"local knowledge* and *previous visits"* as a source of information, is used by those who have been to the destination previously and are from the Melbourne's West. Not only can they create volume but they can also act as advocates for the organisation through positive word of mouth and referrals. Hearing about Werribee Park through *friends and acquaintances* was an important source to first time visitors and those under 40. While the perception is that younger age groups are more inclined to use the internet for sources of information, it must be noted that to use the internet first you must have some idea of what you are searching for. This group may be more attracted to the park rather than the Mansion; hence future promotion of the area should aim to describe all activities available. "*Information centres, the Internet and other media"* are commonly used by first time visitors. The media was also used by those from Melbourne's East and South East. *Events* are more commonly a source of information for couples and repeat visitors. Strategies to increase awareness of Werribee Park for vital market segments were raised in Part 1.

2.4   Attractions Visited

The majority of visitors specifically came to the Werribee Park precinct to see The Mansion (66%). Ninety two percent of the respondents visited the Mansion. While this percentage is high, it should be noted that the survey was conducted on the grounds of Werribee Park Mansion. During their visit, most visitors walked through the:

- Rose Garden (63%),
- Sculpture Walk (48%),
- Laundry (49%),
- Farm (34%) and
- River Area (32%).

Profiles of visitors to the other attractions are provided in Figure 3.8. Only 14% of visitors visited the Tower. This is because of the additional cost involved, which deters

visitors from selecting this option either because they are unable to evaluate its value to the total experience or believe that the cost would not justified by the expected value.

The results show that there were 8% of visitors on the grounds of Werribee Park who did not visit the Mansion. This is most likely to be because they have visited this on previous occasions.
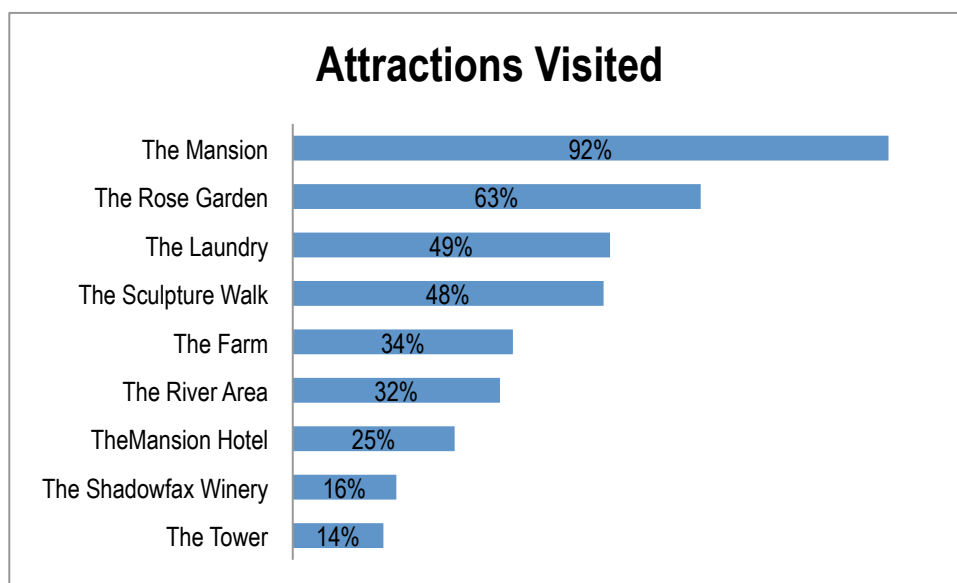
Attractions Visited

Attraction	Percentage
The Mansion	92%
The Rose Garden	63%
The Laundry	49%
The Sculpture Walk	48%
The Farm	34%
The River Area	32%
TheMansion Hotel	25%
The Shadowfax Winery	16%
The Tower	14%

Figure 2.8: What Attraction were Visited

2.5   Visitor Satisfaction

The visitors' overall satisfaction levels with their visit to Werribee Park were high, with an average rating of 5.4 (out of 6). The "general environment and atmosphere" (mean score of 5.6), along with "the variety of things to see" (mean score of 5.3) was viewed positively by visitors. While still performing well, "signage" (mean score of 5.1) and "information and advice" (mean score of 4.9) was rated lower, with greater variability in responses. This indicates that these areas may need some attention. Comments from visitors also raised signage as an issue in some instances:

> *"A few more 'you are here' maps would be good – haven't seen one yet".*
> *Better signage out at the gateway, eg carpark – which way to the mansion, rose garden and hotel".*

Table 2.1: Satisfaction with Facilities

	Mean	Standard Deviation
General environment and atmosphere	5.6	0.7
The variety of things to see	5.3	0.9
The clarity of signage and labelling that made finding things easier	5.1	1.0
The ease with which you could get information and advice	4.9	1.0

Scale: 1 = Very low satisfaction to 6 = very high satisfaction

Visitors overall satisfaction was high (92%). There were no significant differences in overall satisfaction for the various subgroups of visitors (e.g., age, number of children, gender, region, first visitors). As shown in Figure 2.5, while 92% of visitors were highly satisfied, only 52% rated satisfaction on the scale as 6/6, and 40% rated this as 5/6. There were some visitors who were not fully satisfied with all aspects of their visit and this may be for a range of reasons and some of these may be related to the items in Table 2.1, such as visitors expecting more information and advice, better signage or more variety. Of course, the failure to get information and advice may be related to the visitors not taking the audio or personal tour options, and consequently felt that they would have liked to find out more. This indicates that there is a price-value divergence, which results in the need to lower the financial cost of the visit and this is done by not selecting these optional extras.

The average score of 4.9 out of a maximum six indicates for the item "the ease with which you can get information and advice" may indicate that visitors associate "education and learning" as an important and perhaps an integral aspect of visits to heritage destinations. Some examples of comments pertaining to better information were:

> *"Improvements to brochures at entry, maps very poor (showed inaccurate layout). Rooms should be more clearly labelled. More information about furniture and settings."*
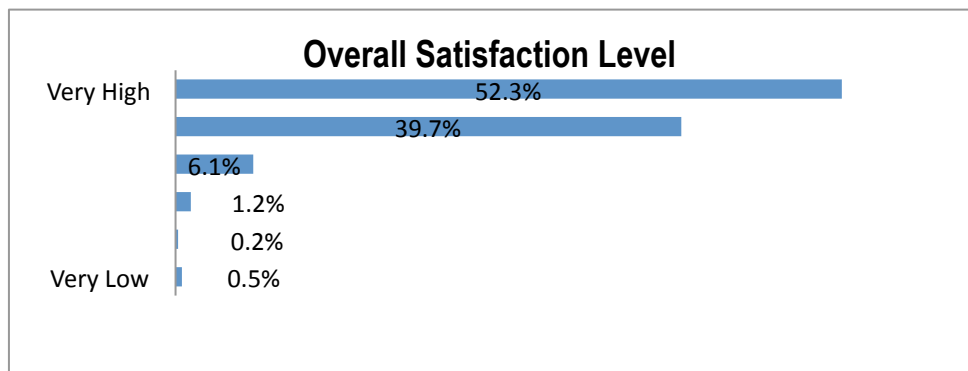
Figure 2.9: Overall Satisfaction of Werribee Park

Visitors had very high satisfaction levels with the general environment and atmosphere of Werribee Park (93%).
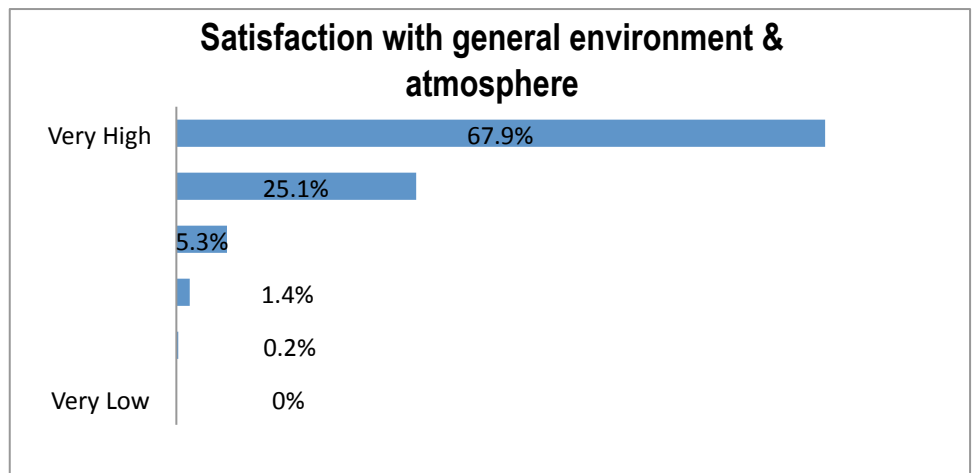

Figure 2.10: Satisfaction Levels of the Environment and Atmosphere at Werribee Park

Half the visitors had very high satisfaction levels with "the variety of things to see" at Werribee Park (51%).
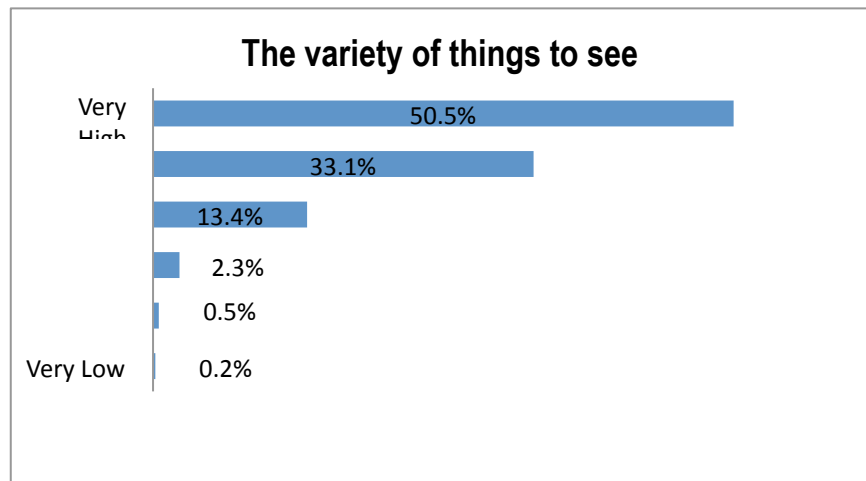
Figure 2.11: Satisfaction with the Variety of Things to See at Werribee Park

Visitor satisfaction levels for ease of information and advice was lower compared with the other aspects of Werribee Park. Sixty nine percent rate this aspect as generally high. There were significant differences between the age of respondents and the ease with which you could get information ($\chi 2 = 11.2$, df 5, p=0.048). Visitors over the age of 40 indicated very high satisfaction with the environment (60%) and 34% had indicated high satisfaction. The responses from those under 40 were more evenly spread.
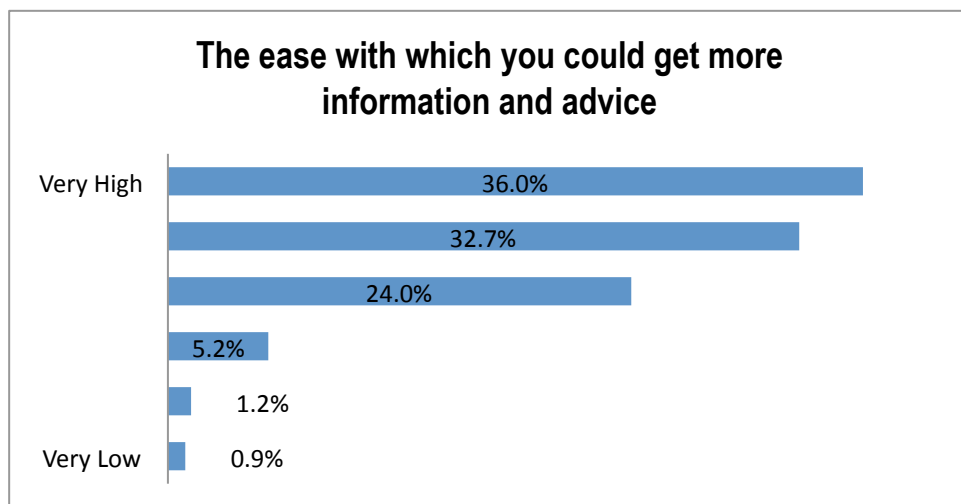
Figure 2.12: Satisfaction with Ease of Information and Advice at Werribee Park

The clarity of signage and labelling that made finding thing easier was rated high by most visitors (75%), though not as high as other aspects. This is an area that could be improved. There were no significant differences in response to this statement across the

different subgroups examined (e.g., age, number of children, gender, region, first visitors).

The clarity of signage and labelling that made finding things easier

|	
Very High	40.3%
	34.2%
	18.5%
	5.6%
	0.9%
Very Low	0.5%
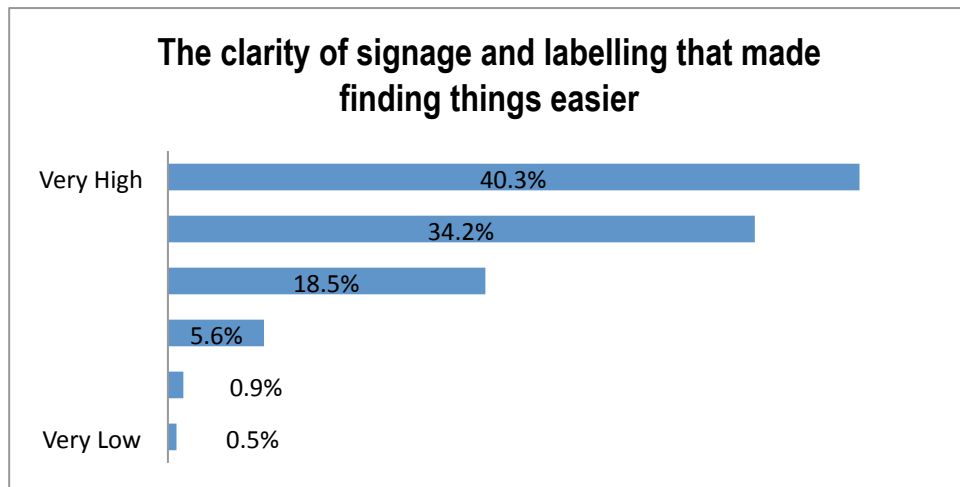
Figure 2.13: Satisfaction with Signage at Werribee Park

Comparative high satisfaction achieved by items

Overall satisfaction with the visit	92
The clarity of signage and labelling	74
The ease with which you could get more information and advice	69
The variety of things to see	84
General environment and atmosphere	93
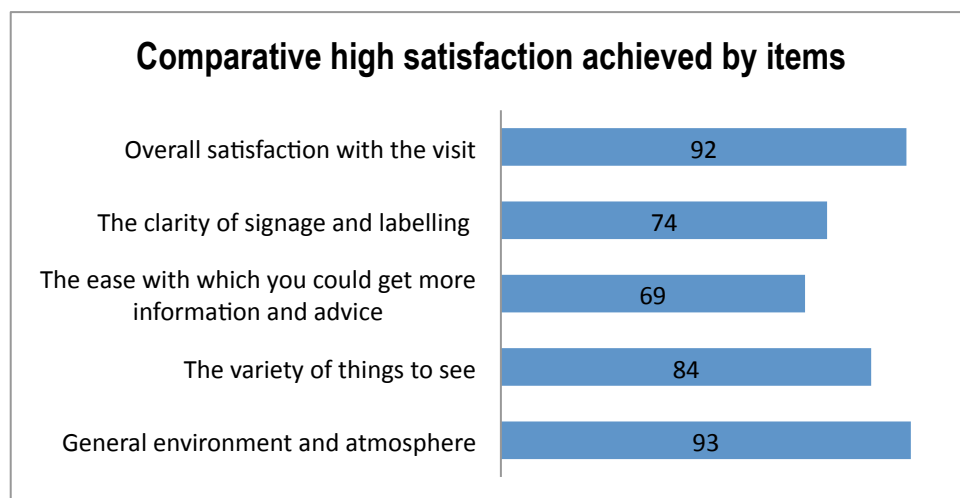
Figure 2.14: Comparative Satisfaction

The overall visit satisfaction and the satisfaction towards the general environment and atmosphere of Werribee Park were rated as 92% and 93% respectively. However, some visitors may have expected a greater variety of things to see, while more than a quarter of the visitors felt that improvements could be made to signage and information services.

2.6   Attitude towards Werribee Park

Attitude towards Werribee Park focused on expectations, awareness and promotion, visitor experience, value for money and likelihood of recommending behaviour. It was measured using a series of statement with visitors indicating whether they agreed or disagreed with the statement, which are shown in Figure 2.15 and discussed under various headings below.

Figure 2.15: Personal outcomes - attitudes

2.6.1 Expectations

- Visitors do not appear to come to Werribee Park with clear expectations about what they will see (54% agree).

- Not surprisingly, visitors from Melbourne's West came with clear expectations about what they would see (76%), as did repeat visitors (72%). This indicates the need for a marketing effort that raises the awareness levels about the specific products and services available.
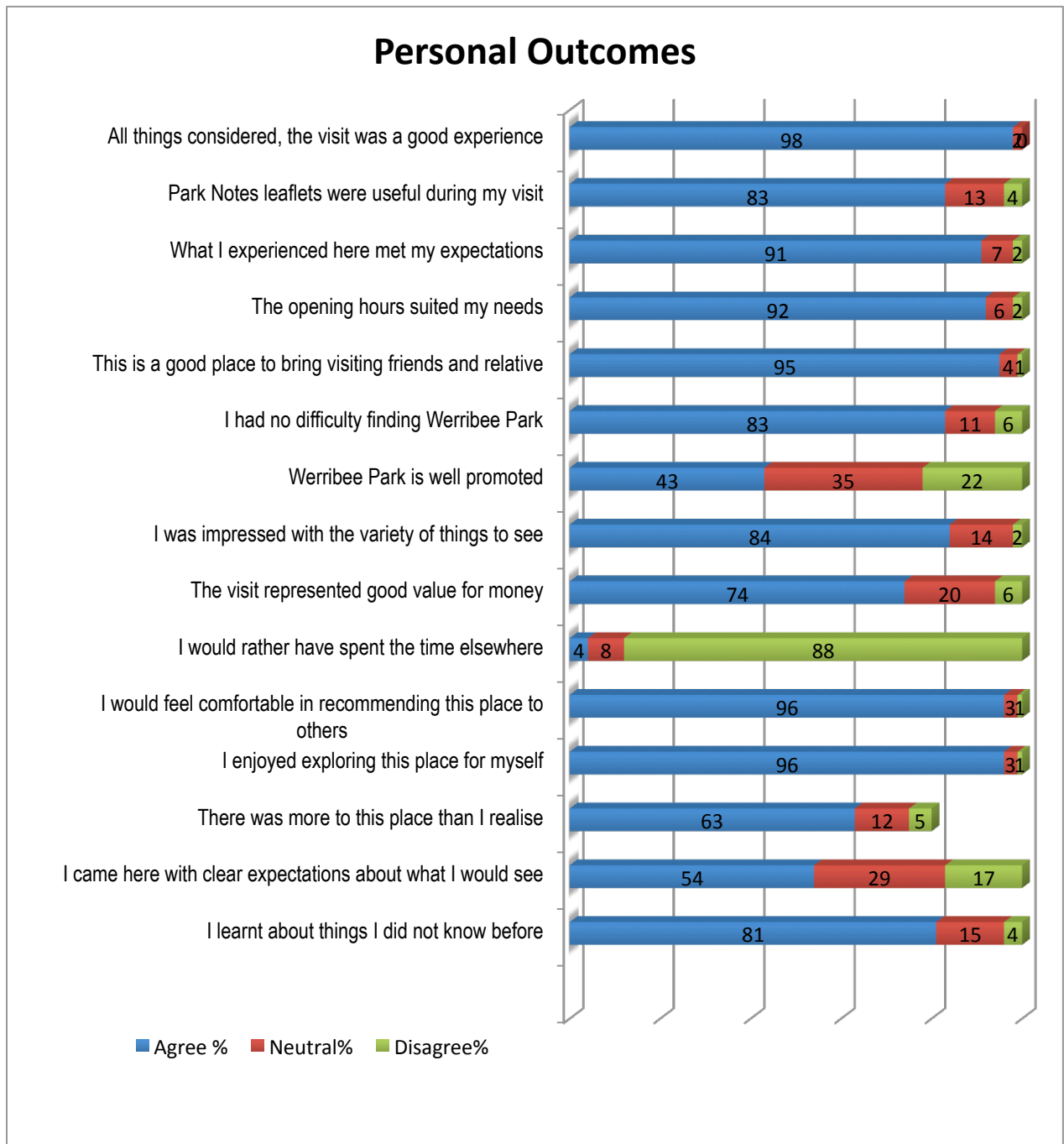
- Only 43% of visitors agree that "Werribee Park is well promoted" is an indication that what people find here well surpasses their expectation and a number of people come without a clear understanding of what is available. Consequently, the statement "There was more to this place than I realised" had 63% agreement.

2.6.2 Awareness / Promotion

- Visitors generally had little difficulty finding Werribee Park (83% agree).

- Not surprisingly, first time visitors had more difficulty finding the place (8%) compared to repeat visitors (4%).

- The park notes were well received (83% agree) and were preferred by visitors over the age of 40, with 88% generally agreeing with the statement compared with 76% of those under 40.

- Visitors without children also preferred the notes (84%) as did visitors with three to four children with them (88%).

- The notes were also found useful by 89% of first time visitors.

- Werribee Park is well promoted was not perceived highly (43% agreement).This view was consistent amongst all visitors. There were no subgroup differences.

2.6.3 Visitor Experience

The educational benefits (*I learned about things I did not know before*) derived from the visit is generally viewed positively (81% agreement).

- Age has an impact on visitor perceptions of a learning experience with 87% of those over the age of 40 indicating "I learned about things I didn't know" compared to 73% of those under 40.

- Eighty four percent of those who visited Werribee Park without any children with them generally agreed that they "learned about things they didn't know".

- First time visitors generally agreed that they learnt something new, with 87% of them agreeing with the statement. There was no gender or regional differences.

The experience at Werribee Park appears to meet the expectations of visitors (91% agreement). This could be because they do not have well formulated expectations prior to the visit.

- Visitors over the age of 40 (92%) agree that their expectations are met compared with those under 40 (89%).

Werribee Park performed reasonably well in delighting visitors. Visitors responded positively to the statement "There was more to this place than I realized" (63% agreement).

- Those over 40 years of age were marginally more likely to agree with this view (86%) compared to those under 40 years of age (79%).
- Also, a large proportion of first time visitors (90%) expressed their delight in the attractions of Werribee Park.

Many visitors "enjoyed exploring this place for myself" resulting in a 96% agreement with this statement.

- There is a relationship between age and this sense of personal exploring. Those over 40 years of age tended to agree more with this statement (99%) compared with the younger age group (94%). No other sub group differences were found.

Many visitors disagreed with the statement that 'they would prefer to spend time elsewhere" (88.1% agreement).

- Those over the age of 40 were more inclined to disagree with the statement (91%) compared with 84% of those under 40. A higher proportion of those under 40 agreed with the statement. No other subgroup differences exist.

Visitors were generally impressed with the variety of things to see (84% agreement), however, the agreement was lower in relation to other attitudes towards Werribee Park.

- Age had an impact on the attitude that there were a variety of things to see. Visitors over 40 years of age generally agreed more with this statement (88%) compared with 80% of those under 40.

The opening hours suited visitors (92% agreement). There were no significant subgroup differences.

Overall, the visitors considered their experience at Werribee Park as good (98% agreement). The experience was generally more favoured by those over the age of 40. In fact, 70% of those over the age of 40 strongly agreed with this statement.

2.6.4   Value

There was general agreement that Werribee Park offered value for money (74% agreement).

- Only a small number of visitors were, however, willing to pay extra for the tower tour and the audio wand. Some visitors believed that additional costs were not justifiable.
- Visitors over the age of 40 were more likely to agree with this statement (82%) compared with the younger age group (64%), perhaps because this later group may be encumbered by children. With the additional cost of the options being based on individuals and no group discounts applying, affordability becomes an issue for families. However, no significant differences were found between the number of children in the party and value for money.

There were 38% of visitors who were aware of the cost prior to their visit and only 13% were deterred by the cost in deciding to visit Werribee Park.

2.6.5   Recommending Behaviour

Visitors are likely to recommend Werribee Park to others (96% agreement), despite the fact that they may not be entirely happy with all aspects of the visit. There were no significant differences between difference groups of people.

There was strong support that Werribee Park is a "good place to bring friends and relatives" (95% agreement). There were gender differences with more females strongly agreeing with this statement (67%).

2.7   Revisit Expectations

Repeat visitation provides surrogate evidence that visitors are satisfied with the destination or attraction. There was high support (73%) that the visitors are likely to visit Werribee Park in the next 5 years.

Table 2.2: Likely to Visit in the Next 5 Years

Future Visit	Frequency	Percentage
Yes	318	73.1
No	28	6.4
Unsure	89	20.5
Total	**435**	**100**

The reasons given for not revisiting were not due to an unsatisfying experience. Only 4% of those who indicated they would not return expressed that the experience was not good. Other reasons given for not returning are due to visitors not likely to return to Victoria. This is summarised by comments such as:

"Probably won't be back to visit this area."
"Going back overseas."

Other comments made by visitors who are unlikely to return suggest that some believe that there is no need to return. The visitors may perceive that the Mansion is unlikely to change. To ensure that visitors return, products and services need to be constantly changing and visitors need to feel that the organisation is attempting to engage with them. Comments made by visitors reflect that there isn't anything drawing them back to Werribee Park or the Mansion.

"Had a good look today."
"Once is enough."

PART 3

Summary of Findings and Strategies for the Future

This section of the report includes a summary of the key findings followed by the strategic and planning implications that arise from the summary and the details included in this report. The findings are listed under appropriate headings, which should guide the strategy formulation process.

3.1   Summary of Findings

Overall satisfaction:

- Visitors' overall satisfaction was high (92%). There were no significant differences in overall satisfaction for the various subgroups of visitors (e.g., age, number of children, gender, region, first visitors). There were some visitors who were not fully satisfied with all aspects of their visit and this may be for a range of reasons such as visitors expecting more information and advice, better signage or more variety.

- The overall satisfaction rating for Werribee Park was high, with an average rating of 5.4 (out of 6). The "general environment and atmosphere" (mean score of 5.6), along with "the variety of things to see" (mean score of 5.3) was viewed positively by visitors. While still performing well, "signage" (mean score of 5.1) and "information and advice" (mean score of 4.9) was rated lower, with greater variability in responses.

- Visitors over the age of 40 indicated very high satisfaction with the environment (61%) while those under the age of 40 did not display the same degree of satisfaction with the atmosphere and environment. Visitors who rated their satisfaction with the environment as very high were predominantly females (71%). First time visitors tended to rate the environment as average.

Engaging visitors:

- Those that were part of a personally guided tour, which was mainly associated with the Tower Tour, and incurred an additional cost of $4 tended to be more satisfied and reported a better experience than those that did not participate. Those that took the self-guided audio tours, involving the audio wand reported a more positive experience than those that did not get either the wand or the tour of the tower.

- Visitors that were able to participate in some way such as wearing of the period costumes tended to report a better experience. Visitors who were able to identify various photo opportunities tended to report a more positive experience. Most that had some interaction and communication with staff at the Mansion reported favourable experiences.

- Insights from experiences highlight that visitors are looking for "engaging experiences". It may be possible, given the age of the participants, that these sorts of experiences are desired by younger visitors. Otherwise, experiences were mostly described as "tranquil, serene and peaceful" and most of the visitors enjoyed "the freedom to explore without any pressure". However, the negative side to this is that in a vast and sprawling estate there could be a number of sights or attractions that could be missed. Some visitors reported being tentative at first and unsure about how to proceed with the tour, indicating a need for a structured tour option.

Major attractions:

- In Sixty-six percent of cases the visitors indicated that the Mansion was the prime purpose for their visit to Werribee Park indicating that it remains the major attractor of visitors. Some of the other attractions which were identified as the main reason for coming to Werribee Park were the parks and gardens, the hotel, the Zoo and picnics.

- Ninety two percent of the respondents visited the Mansion. During their visit, most visitors walked through the Rose Garden (63%), Sculpture Walk (48%), Laundry (49%), Farm (34%) and River Area (32%).

- Only 14% of visitors visited the Tower. Visits to the Tower are lower in number and is related to the extra charge involve and the restrictive tour times.

- The number of attractions visited is time dependent as is the time spent at each destination and it appears that the optimum may be between 3 and 4 attractions per visit. The study shows that 30% visited only one or two, 38% visited three or four, 22% visited five or six and 10% visited seven or more during the one visit.

Tour times:
- The average time spent at Werribee Park was 3.15 hours (excluding the hotel guests). Visitors expected, on average, to spend approximately 2.11 hours. Breaking down the time into categories: 37.6% spent up to two hours and a further 30.5% spending between two and three hours at the precinct.
- There is a significant difference between the time visitors expected to spend and the time actually spent. For example, 75% of those who expected to spend up to two hours actually did spend that time. However, the remaining 25% actually spent more time, some spending three times more than they expected. From those that expected to spend between 2 and 3 hours, 25% spent less and 38% spent more time. From those that expected to spend between 3 and 4 hours, there were 67% that spent more time.

Expectations:
- Visitors do not appear to come to Werribee Park with clear expectations about what they will see. Visitors from Melbourne's West came with clear expectations about what they would see (76%), as did repeat visitors (72%).
- The notion that "Werribee Park is well promoted" did not rate highly and is a clear indication that what people find here well surpasses their expectation and a number of people come without a clear understanding of what is available. Consequently, the statement "There was more to this place than I realised" was rated at as high. Most visitors considered Werribee Mansion as not being well promoted.
- Visitors were generally not able to form clear expectations about what will happen when they reach the destination, and how much time will be required at the various attractions. Visitors that had formed impressions of what the visit will entail often underestimated the time required.

Information sources:

- In the case of all visitor segments, the main sources of information for Werribee Park are local knowledge (32%), friends & acquaintances (31%), previous visit (30%) and relatives (15%). The Internet (15%) was also a popular way to seek information about Werribee Park.

- Hearing about Werribee Park through *friends and acquaintances* was an important source to first time visitors and those under 40. While the perception is that younger age groups are more inclined to use the Internet for sources of information, it must be noted that to use the Internet first you must have some idea of what you are searching for. *"Information centres, the Internet and other media"* are commonly used by first time visitors. The media was also used by those from Melbourne's East and South East. *Events* are more commonly a source of information for couples and repeat visitors.

- The internet access and linkages were found to be confusing in a number of instances as expressed by this comment: "I was a bit confused because so many sites are talking about the same thing". A number of verbal and written suggestions were made about how the website could be improved.

- Friends and relatives are an important source of information about Werribee Park, with 46% identifying this as a source. This indicates the power of word-of-mouth in interest generation. Together with the finding that 95% of respondents agree that "this is a good place to bring friends and relatives" indicates that the "visiting friends and relatives (VFR) is an important segment. This is especially so for people in the West, as Werribee Park is their "local" heritage site.

Visit frequency:

- The majority of repeat visitors were last at the Park less than a year ago (36%), these consisted of 75% who were from the Melbourne's West.

- Twenty-six percent were revisiting after more than 10 years.

- Awareness studies indicate that 65.5% had visited Werribee Park on more than one occasion, and 34.5% had visited only once. 58.3% had visited the State Rose Garden on their last visit but may have visited this on a previous visit.

- In a sample of 436 visitors, 43% of the Victorian and 23% of all visitors were from the western part of Melbourne. In the case of 82% of those visitors from the West they had visited Werribee Park previously. Furthermore, 15% has already

visited earlier this year and an additional 46% had been here between 2007 and 2009.

Value:

- Only a small number of visitors were willing to pay extra for the tower tour and the audio wand. Some visitors believed that additional costs were not justifiable. With the additional cost of the options being based on individuals and no group discounts applying, affordability becomes and issues for families. There were 38% of visitors who were aware of the costs prior to their visit and only 13% were deterred by the cost in deciding to visit Werribee Mansion.
- The Park notes were preferred by visitors over the age of 40, with 88% generally agreeing that the notes added value to the visit, compared with 76% of those under 40. The notes were also found useful by 89% of first time visitors.

Support for heritage:

- There is considerable support for preserving heritage sites for its educational and historical value, however, people who had previously visited the Mansion supported this notion more strongly.
- Expenditure on the preservation of history is widely supported.

Visitor groups:

- A significant number of the Victorian visitors lived in Werribee (15%) and the surrounding areas of Hoppers Crossing and Tarneit (8%).
- A high number of the country visitors also went to the Shadowfax winery during their visit (20%), and 15% were guests of the Mansion Hotel. Country visitors were also high users of the "park notes" with 73% accessing these notes during their visit.
- Overseas visitors represented 9% of all visitors. Many of them became aware of the offerings from friends and acquaintances (57%) and relatives (14%). Internet search was high amongst this group at 22%.

3.2   Conclusions and Strategies for the Future

3.2.1   Strategies for Raising Awareness

On a broad scale, awareness raising in relation to a specific tourist destination such as the Werribee Mansion has to be tackled on a number of different levels. These levels include the organisation, the precinct, the community, the local and regional tourism bodies, the State and the nation. There are numerous interconnections and networks that have to be identified and exploited as a part of the awareness raising process.

One significant advantage that the Mansion possesses is that it is relatively well know, especially amongst the older population and especially amongst those in the West. For many in the West, Werribee Park is the premier tourist destination and it is somewhere that is regularly visited and guests taken to. There appears to be some degree of "local ownership" that should be harnessed because people of the West are in some ways the major stakeholders of Werribee Park. This is particularly important in that this region is one of the fastest growing in terms of new household formation and land development, providing an expanding market for localised tourist destinations. This makes local awareness raising a key function not only for the Mansion but other precinct destinations.

Two important market segments are "local" to this destination and can be identified as:
- new households and
- visiting friends and relatives (VFR).

Who Should Be Targeted

General awareness comes from a range of promotional activities, but these only go so far in "bringing the people through the door", which is the ultimate goal of all enterprises. Almost everyone seems to have "heard" of Werribee Park yet many have not yet visited, as is discussed later in this report. The reality is that we want more people to come, and we want them to come more often. The "build it and they will come" concept works for a while and soon turns to a trickle and targeting and repositioning needs to be utilised to maintain interest.

Werribee Park has a number of tourism products and targeting becomes difficult if we see this as a package of offerings. When attempts are made to sell the package of offerings we are often unable to identify large and specific markets. Therefore, from a targeting point of view we must "un-package" the bundle and identify what products and services will most suit what markets.

In simplified, yet realistic terms, what we have on this site is an historical house, a park-like garden and the State Rose Garden, amongst numerous other attractions. The core tourism product with respect to the Mansion, for example, has a number of aspects such as:

- Education about life a century ago
- Lifestyles of the wealthy
- Architecture and construction
- Evolution of land use and development

While for many all these are of interest but different aspects could well be marketed to different markets. For example, in the slow visitation periods the school excursion market of history and art classes could provide a constant stream of numbers. There is scope to engage historical and architecture clubs and societies, not only to hold events but also to secure involvement as volunteer guides. Previous Parks Victoria studies have found that the Mansion is perceived as an historical and educational site (Market Solutions, 2009).

Consequently, it is critical to engage the historical and educational communities in their many forms. If the community infrastructure does not exist, for example there may be no history or architecture clubs, then these could be facilitated as a deliberate relationship building strategy designed to reconnect the Mansion with the community. In meeting educational needs, the schools are an obvious community to reconnect with, starting with perhaps those in the West of Melbourne. The various surveys undertaken during this study, showed that "school excursion" was often stated as the reason for their visit.

Similar principles can apply to other products on offer, such as the heritage garden and the rose garden. The advantage of unravelling the package on offer exposes targeting potential and synergies between the different products and enriches the tourism

experience by re-engineering the products specifically for its different stakeholders, communities and markets.

Direct Marketing and Network Marketing

This moves us to an important question, which is how do we do the targeting in a cost effective manner. The most effective method is to make someone responsible for the "advocacy" role linking the products with the various target markets and target communities. In our view, locally based public sector tourism enterprises have been somewhat derailed by the "target market concept" and must re-engage with target communities and foster local ownership. The word "community" here is not being used in a local sense. For example, I may not consider myself as local to Werribee or to the West, but I may be a member of the Friends of Werribee Mansion, therefore I am a member of the "target community".

Unfortunately target communities do not always evolve spontaneously and naturally, they sometimes need to be facilitated. It requires commitment, a plan and a medium to long-term strategy. The way in which this can be achieved is through market facilitation, direct marketing and network building.

The advocacy role for Werribee Park would be a direct marketing role that involves the various existing and new communities, such as primary and secondary schools to capture that market, for example. Direct marketing involves the whole gambit of marketing activities such as public relations, personal selling and coordination of all the activities required to "deliver" the tourism products and services to the target communities.

What must be realised is that the needs of the different target communities will vary and may be different for the same community at different times. This brings about a shift in the way that tourism products are perceived, both by the provider and the customer. For example the product experience that a history class receives will be entirely different from product experience received by participants of the architecture conference at the Mansion Hotel.

The shift here is from the "one product many markets" concept to "many products many markets".

Integration and Coordination

Werribee Park offers a range of attractions that are discussed in this report and represents a precinct that is known right across Melbourne, as the various studies indicate. Attempts are being made at the local and regional levels to lift the profile of this tourism area and make it into a well recognised destination. There is a diversity of attractions within this precinct, with the Open Range Zoo and the Mansion being the best recognised. The studies show that while being located adjacent to one another, these are two unique destinations. In 63% of cases, the Mansion was the principle reason for visiting Werribee Park, and in 19% of cases, the Zoo was identified as the main reason for coming to the precinct, indicating that the Mansion is a major attractor of visitors.

There is a danger that a wrong perception may be created in marketing the precinct rather than individual attractions, all of which are managed and operated separately. There is some synergy in coordinating the marketing of the precinct, but it should be recognised that the unique selling proposition will always become difficult to identify, purely because of the diversity of offerings. The tourism precinct is always merely a collection of tourism products and services within an identifiable area. We can harness the benefits from working collaboratively in the marketing effort, develop infrastructure that positively supports individual entities and develop new products and services that are complementary and not directly competitive. This will bring about uniformity in strategic direction and deliver synergies in capturing new markets and linking with new communities and stakeholders.

3.2.2 Branding Strategies

An important strategic issue is what should be branded, the precinct or the individual entities within the precinct. The Open Range Zoo is already a well recognised brand but there still remains some confusion about Werribee Park and Werribee Mansion. In addition there is the Mansion Hotel and Parks Victoria, which introduces another layer of confusion.

There appears to be an inherent weakness in viewing the diverse range of offerings available at Werribee Park as a precinct. It should be noted that "precinct" is a planning terminology, in that it is used to define an area. It is not a marketing strategy.

Confused Brand Perspectives

There are historical reasons for the way in which these have developed. It is important, however, to attempt to unravel this by creating unique identities, especially for those products and services being managed by Parks Victoria. In relation to the Mansion, which is the focus of this study, it is important to create a unique and separate identify so that it continues as the key reason for visits to the destination and not as a piggyback for other attractions, such as the rose garden, the hotel or the zoo. This is not to say that the different entities should not work cooperatively and seek synergies in the ways new markets and customers should be sourced and to work together to advance the awareness and experience of visitors.

The first step required is to remedy the confusion surrounding the identity of Werribee Park. The word "park" has a number of connotations and may be sending mixed messages to the marketplace in relation to exactly what is at this location. In the context of Werribee Park there are no definable boundaries. For instance, a horse lover would associate Werribee Park with the Equestrian Centre, and a rose enthusiast may associate it with the Rose Garden. Werribee Park has many communities and each entity within the park has their own stakeholders. The strength of Werribee Park as a brand will only come through the success of the individual entities within it, such as the Mansion, the Zoo, the Hotel, the Shadowfax, etc.

To some extent the tendency has been to lift the profile and awareness of Werribee Park and this has been achieved in that most people know of its existence, but this has but readily translated into increased demands. Demand focussed efforts must ultimately rest with the individual entities and the success of each operation will eventually have spin-offs for other businesses. One way to achieve this is to create strong brands that relate to the diversity of tourism experiences the precinct has to offer, such as the Zoo and the Mansion, which are the best recognised of all the attractions in this precinct. Unique identities are important for clarifying what the offerings are and what markets and niches

exist for the different enterprises at this precinct. The marketing of a precinct with a diverse range of activities that are owned and delivered by a number of operators, can make it difficult to deliver clear and consistent messages about the precinct.

Each entity will have its own brand touch-points, with each contributing to how the Werribee Park brand will be perceived. Therefore, a coordinated approach to product and service development and delivery is more likely to result in the unification of themes and marketing messages. This is already occurring to a large extent. However, each must identify, develop and reconnect with its communities and stakeholders.

Web Presence

The Mansion is perceived as a heritage destination and as such the main reason for visiting heritage sites is linked with its educational, cultural and historical value. Web presence is important not only from a tourism perspective but also from an educational and historical perspective, especially if these communities are to be specifically targeted. The studies also show that visitors were unable to form clear expectations about what was available at this site and many actually spent longer than they initially expected to. Furthermore, in some cases information needs were not adequately met.

Currently, the Parks Victoria site is the main source of web information for the Mansion but there is a confusing array of sites that relate to it in some way. Various pages appear to be linked in a circular manner and information in any depth can only be found via links to "Park Notes" pages. A clearer web presence will require a web strategy that connects with stakeholders and communities and must be a stand-alone site for the Mansion, providing a 'virtual' tour, with photo galleries, videos and feedback.

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APPENDIX 1:

Survey Instruments:

Werribee Park Visitor Survey 2010 – Questionnaire

1.   **Did you come to The Werribee Park Precinct today specifically to visit the Mansion?**
    ☐ **Yes** ☐ **No** (If 'no' what was the main reason for coming to this area:_____)

2.   **Which of the following did you visit? Please tick all that apply.**
    ☐ The Mansion (house)   ☐ Sofitel Hotel
    ☐ The Tower   ☐ The Sculpture Walk
    ☐ The Farm   ☐ The Rose Garden
    ☐ The Laundry   ☐ The Shadowfax Winery
    ☐ The River Area

3.   **In order to continually improve the services of Werribee Park, could you please indicate your level of satisfaction with the range of facilities listed below.**

-SATISFACTION

	Please circle the number that you think best applies to each of the statements below.	Very High 6	5	4	3	2	Very Low 1
1	General environment and atmosphere	6	5	4	3	2	1
2	The variety of things to see	6	5	4	3	2	1
3	The ease with which you could get more information & advice	6	5	4	3	2	1
4	The clarity of signage and labelling that made finding things easier	6	5	4	3	2	1
5	What is your overall satisfaction level with this visit?	6	5	4	3	2	1

4.   **Prior to this visit, how long did you expect to spend at Werribee Park?**
    _____ hours _____ minutes

    How long was your visit to Werribee Park?
    _____ hours _____ minutes

5. **Please indicate your level of agreement or disagreement for the following statements.**

	Circle the most appropriate number that represents your agreement with the following statements.	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1	I learned about things I did not know before	5	4	3	2	1
2	I came here with clear expectations about what I would see	5	4	3	2	1
3	There was more to this place than I realised	5	4	3	2	1
4	I enjoyed exploring this place for myself	5	4	3	2	1
5	I would feel comfortable in recommending this place to others	5	4	3	2	1
6	I would rather have spent the time elsewhere	5	4	3	2	1
7	The visit represented good value for money	5	4	3	2	1
8	I was impressed with the variety of things to see	5	4	3	2	1
9	Werribee Park is well promoted	5	4	3	2	1
10	I had no difficulty finding Werribee Park	5	4	3	2	1
11	This is a good place to bring visiting friends and relatives	5	4	3	2	1
12	The opening hours suited my needs	5	4	3	2	1
13	What I experienced here met my expectations	5	4	3	2	1
14	Park Notes leaflets were useful during my visit	5	4	3	2	1
15	All things considered, the visit was a good experience	5	4	3	2	1

Please turn over ☺

6. **How did you find out about Werribee Park? Tick all in the list that apply.**

Tour Agents	Media (TV, Radio, etc)
www.werribeepark.com.au	Tourist Information Centre
Internet (e.g. google search)	Events
Brochures	Friends & Acquaintances
Roadside Signs	Relatives
Guide Books	Local Knowledge
Previous visit	Other **Please specify** _____

What would you say influenced you the most in your decision to come TODAY?

_____

7. **Please tick YES or NO for each of the following questions.**

Did you take an Audio Tour?	Yes	No
Did you participate in personally Guided Tours?	Yes	No
Did you collect "Park Notes" leaflets during your tour?	Yes	No
Do you hold a Werribee Park Annual Pass?	Yes	No
Were you aware of the costs involved prior to your visit?	Yes	No
Did the cost involved deter you at any stage of your decision to visit?	Yes	No
Did you make any purchases from the Café?	Yes	No
Did you make any purchases from the Giftshop?	Yes	No
Are you part of a packaged tour?	Yes	No
Are you a guest at the Sofitel Mansion Hotel?	Yes	No
Did you consider going elsewhere today instead of coming to Werribee Park? **If 'Yes'** what else did you consider:	Yes	No

8. **How many people are in your visit group?** Adults   Children under 18 years

9. **Is this your first visit to Werribee Park?**
    Yes   No   →   In which year was the previous visit _____

10. **Are you an overseas visitor?** □ **No**   → What is your postcode _____
                              □ **Yes** → Which country are you from _____

11. **Are you likely to visit again in the next 5 years**   □ **Yes**   □ **No**   □ **Not sure**
    If "**No**" please state reasons _____
    _____

12. **Are you:** Male or Female.

13. **Which age group do you belong to?** 18-24   25- 29   30-39   40-49   50-59   60+

14. **Could you please comment on:**
    • What other features or activities would you like to see at Werribee Park?
_____
_____
_____
    • Any other comments you would like to make about your visit:
_____
_____
_____

Thank you for your help in contributing to the future improvements of the services provided by Werribee Park. If you would like to enter the prize draw for the weekend package at Sofitel Mansion Hotel please complete the entry card.