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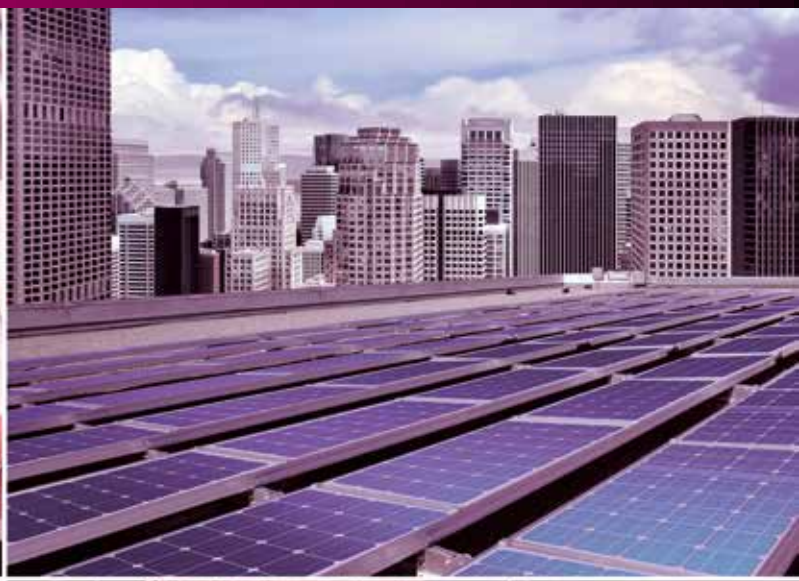

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Aims and Scope

Research in Hospitality Management (*RHM*) is a peer-reviewed journal publishing articles that make an original contribution to the understanding of hospitality and to the theory and practice of international hospitality management.

The journal has three main sections, reflecting the three major foci of its contributions. The first section, 'Hospitality (Management) Studies', includes articles related to the study of and the study for hospitality. The study of hospitality refers to studies about the essence and ethics of hospitality from a social sciences perspective, while the study for hospitality refers to a more disciplinary approach according to the quintessential managerial areas of Finance, Human Resources, Operations, Marketing & Sales, and Technology.

The second section, 'Hospitality Management Education', is devoted to articles about curriculum content and delivery methods for training and educating hospitality managers. Considering the size and scope of the hospitality industry, and the number of staff and students involved, studies on efficient, effective, and innovative ways of developing hospitality competencies are considered indispensable.

The third section, 'Student Research Projects', allows excellent student work to be published. Student work can relate to excellent BA dissertations or MA theses.

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Editorial

This edition of Research in Hospitality Management follows all the themes identified as our editorial approach. Namely, there are papers that are concerned with both the study *of* and the study *for* hospitality businesses, as well as papers concerned with education for hospitality, together with papers based upon undergraduate students' research. It is particularly encouraging to note that several of the contributions are informed by an ethnographic approach. Ethnography is to be encouraged in these circumstances, because the student management project is completed whilst they are undertaking the work placement in the final year of the programme, and the ethnographic research approach allows the researcher to reflect upon personal experiences and feelings. This offers up insights that surveys or other research approaches are rarely able to explore. Unfortunately too few undergraduate students feel confident enough to include their experiences, and how they felt in the work situation, into their dissertation research.

My piece, *Researching snails on holiday: An agenda for caravanning and caravanners*, is not informed by primary research, but suggests that this form of outdoor hospitality needs to be given more attention. The snails metaphor implies that these holidaymakers travel taking a representation of their dwelling with them. The caravan represents that little piece of home, away from home. The research note suggest that we need to know more about this form of vacation and the profiles of caravanners together with a better understanding of campground provision and campground owners.

Hsu's paper, *Brand performance of Chinese domestic vs. international hotels: Perceptions of operators as well as domestic and foreign guests* presents the results of a survey of perceptions of hotel brands in China. Hotel brands represent a significant contribution to reducing anxiety and creating feelings of hospitableness. This has particular significance when travellers are journeying to new and unfamiliar settings. This paper explores the impact of brands for both national and international tourists in China through a survey of hotel operators and their guests.

Looking from a local lens: Inbound tour operators and sustainable tourism in Kenya, by Cavagnaro, Staffieri and Ngesa, compares the rhetoric with the reality of sustainable tourism within the East African country. Findings suggest the inbound tour operators are particularly sensitive to sustainability issues, sometimes even more so than governmental officials. The operators, it is suggested, are often concerned about strong market segments that place high value on sustainability, rather than operating to an ethical agenda driving them towards sustainability.

Christou conducts an ethnographic journey investigating the emotional experiences from visiting various festivals and events. In *An ethnographic study of tourist psychological states: Implications for festivities and events*, he suggests that event and festival organisers need to consider this dimension of the visitor's experiences, as it has the potential to either enhance or retard the visitor's intention to return to the host location. The researcher's ethnographic approach allowed him to report on the experiences and impact such events had upon him.

Riley and Szivas' paper, *Luxury and innovation: Towards an evaluative framework*, argues that luxury is a driver of innovation, which is perhaps something of a grand claim, when others would argue cost minimisation, revenue growth and profit maximisation are the real drivers. They do make an interesting distinction between creativity and innovation. Creativity describes processes through which new ways of doing thing come about. Innovation on the other hand is concerned with the implementation of change.

Hotel quality in the European Capital of Culture: Leeuwarden 2018 by Gehrels and Landen shows that Leeuwarden hotels are ranked at about average in terms of guest comments about the quality of their visit. However, Leeuwarden hotels were in the top three Dutch cities in service provided and this gives a base upon which to build. The selection of Leeuwarden to be the 2018 European Capital of Culture does provide a valuable springboard for the development of future tourism for the city. This paper suggests there is room for improvement, however, if this opportunity is to be realised.

Hegarty's paper, *Culinary and hospitality teaching as a research-based profession*, adds to the journal's education theme. Culinary insights and gastronomy together with the study of hospitality have the potential to provide theoretical underpinnings that the more applied management content of programmes lack. Others have suggested that these programmes need to aim to produce "reflective practitioners", that is, personnel capable of undertaking the tasks associated with the management of hospitality, but also capable of looking critically at existing practice.

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Eringa, Caudron, Rieck, Xie, and Gerhardt's paper, *How relevant are Hofstede's dimensions for inter-cultural studies? A replication of Hofstede's research among current international business students*, explores the original concept of cultural variations by re-employing the instrument with a student sample of over 1 000 respondents. Findings do not uniformly confirm the original observations, but there are some overlaps. The paper suggests that this might be a by-product of sample size, or the unreliability of the instrument. Fundamentally, the notion of one uniform culture within a culture is somewhat questionable, because in any one culture there will be a number of sub-cultures, as well as, perhaps, even counter-cultures.

All at sea: Insights into crew work experiences on a cruise liner by Bolt and Lashley reports on work experiences aboard a cruise liner. In many ways the liner represents for crew a total institution from which there is no escape. Long work hours, and cramped living conditions often shared with fellow crewmembers from diverse, cultural and linguistic background all intensify the sense of isolation and negative experiences of crew life for many hotel services crew.

Pining for home: Studying crew homesickness aboard a cruise liner by Bardelle and Lashley also reports on experiences of work on board a cruise ship. This time the focus is on the feelings of homesickness amongst crewmembers. Homesickness is an emotion that most crew will feel at some stage, though the degree of intensity and the duration of the feeling does vary between crewmembers, and although rarely addressed by management can adversely affect crew performance and service standards provided to guests.

The cheeseboard in Dutch fine dining restaurants, I: Practices and opinions of restaurant professionals by Schulp, Küpers, Nijboer, Rozendal and Westerhuis is the first of three papers exploring the service of cheese in Dutch restaurants with particular insights into the service of wines associated with cheeses ordered. The paper goes on to make recommendations about how restaurants can manage this stage of the meal so as to improve the quality of the customer experience.

Schulp, Gerritsen and de Leeuw's paper *The cheeseboard in Dutch fine dining restaurants, II: Integration of the cheese course into the menu*, recognises that cheese selections made available to guests are not always compatible with dishes served at the earlier stages in the meal. Vegetarian, fish and meat courses require different cheese selections that are in each case more tailored to the main course eaten. There need to be different selections offered depending on the main courses chosen.

The cheeseboard in Dutch fine dining restaurants, III: Using the FSC model in finding good cheese-wine combinations: A pilot study with red bacteria cheeses, by Schulp, Rive and Leeman, adopts an experimental design so as to match the flavours of red wines with appropriate red bacteria cheeses. The cheeses and wines have very similar flavour profiles and this creates the sensation of compatibility.

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RESEARCH NOTE

Researching snails on holiday: An agenda for caravanning and caravanners?

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Vacations spent in caravans account for a significant strand of the UK leisure market. The potential mobility, yet homelike structures, can be said to offer a base of security when staying away. Like snails, caravanners travel taking their domestic space with them, and when the weather is inclement, or fellow campers unattractive, they can withdraw into their home-like shelter. This research note explores some of the current research and publications about caravanning and caravanners. It also critically explores some of the gaps in current knowledge, as well as suggesting a potential agenda of research themes and topics. Specifically, the piece highlights the need for knowledge about those who choose to engage in this form of accommodation, and their motives for doing so. It is suggested that this should initially focus on the UK, but the note goes on to argue that there are interesting insights to be gained from contrasting and comparing international trends and patterns of usage, as well as the varying profile of users. It also suggests a need for more research on campgrounds and their owners.

Keywords: caravanning, caravanners, outdoor hospitality, self-drive tourism

Introduction

Caravanning and caravanners represent a fascinating element of the national and international leisure market. Caravanners typically reside in locations that are outdoors, which symbolises a return to nature, as well as an opportunity for mobility and vacations in a variety of venues (Joppe, 2013). In many ways these experiences are shared with those who use tents and various other temporary dwelling formats. Unlike other campers, however, caravanners combine mobility with accommodation that incorporates many of the tangible comforts of home (Newton, 2008). When caravanners go on holiday, they can be said to be like snails in that they carry their "homes" with them.

The paper explores caravanning, primarily as a leisure activity, involving both short and long stay experiences. Many of the secondary sources are reports aimed principally at the caravan supply and campsite sectors. Most of these studies tend to conflate data about caravanning and caravanners with data about other outdoor hospitality activities under canvas (Mintel, 2013). Whilst there are clearly consumption trends, tendencies and extrinsic impacts in common, there may be some differences in the way holidaymakers in various canvas and caravan formats react to changing consumer tastes, economic circumstances, and weather conditions. This paper proposes the need for more detailed research that explores caravanning in particular. Similarly, there is a need to have a much more informed picture of caravanners. Some of the research discussed later does give interesting insights, but the suggested market segments in these reports are somewhat crudely drawn and tend to lack detailed linkages between accommodation formats with consumer segments, demographic profiles, and occasionality choices.

This research note suggests the need for a research agenda that addresses the study of caravanning and caravanners, as this will provide an insight into "outdoor hospitality" (Brooker & Joppe, 2013), which, for most participants, is a key vacation experience (Sethi, 2000). Initially the study should explore these activities within the British context, but subsequently explore similarities and differences with other societies. The document highlights current research on caravanning as a leisure activity; it then identifies some of the insights into the caravanners themselves, and finally suggests a research agenda designed to address both current gaps in knowledge, and embellish existing insights.

Caravanning and the great outdoors

This research note recognises caravanning as an element of wider recreation experiences that involve hospitality outdoors (Brooker & Joppe, 2013), and/or drive tourism, and/or self-drive tourism (Prideaux & Carsen, 2003). In essence, this encompasses forms of recreation involving at least one overnight stay away from home, typically with some form of transport incorporating accommodation, to an outdoor recreational destination. In Europe one in six of all overnight stays were spent on a campground (Eurostat, 2012). This "outdoors hospitality" appears to be particularly attractive to Europeans, North Americans, Australians and New Zealanders, though there is said be to be growing interest in China (Mao-Ying & Pearce, 2014) and India (Brooker & Joppe, 2013).

Caravanning is chiefly a recreational activity (though not exclusively), based upon driving from a point of origin to a destination in a vehicle with towable accommodation, or recreation vehicle, incorporating facilities supporting domestic living – shower and toilet, cooking and dining space, seats and beds, for example. Whilst there are some units located in semi-permanent settings, mobility is a key feature of the segment, and much of the literature discusses caravanning and camping as one sector. It is therefore often difficult to distinguish observations about camping, involving tents, and caravanning, based upon these portable structures. This note explores some of these overlaps and identifies potential issues that should be explored in more distinctive detail.

Whilst there is international commonality in this leisure experience, there are variations in the terms employed in different national contexts to describe these activities. The Mintel Report – *Camping and Caravanning – UK*, (2013, p. 15) includes observations about a variety of mobile and static caravans, as well as towable caravans, mobile homes and campervans plus camping in tents and "glamping" – combining glamour and camping.

The National Caravan Council is the over-arching industry trade body, involving the caravan supply chain in the UK. Membership includes the manufacturers of tourers, motorhomes and holiday and park homes; retail dealers of tourers and motorhomes; distributors of holiday homes; holiday and residential park operators; suppliers of components, appliances and accessories; and specialist service providers to the industry (NCC, 2014). The Council describes the caravan sector as covering four broad categories; touring caravans (tourers), that is, towed caravans; motor homes or campervans; caravan homes, meaning semi-permanent homes; and park homes which are more permanent structures designed for holiday parks (NCC, 2014). The NCC's 800 members supply over 90% of all the tourers sold in the UK and a significant share of the motor homes and caravan homes supplied. Park homes are an almost exclusively British market (NCC, 2014).

In the USA, "recreational vehicles" is a term used to describe a collection of leisure activities involving vehicles that include some form of accommodation. Brooker and Joppe suggest that, "The majority of RVs are travel trailers and caravans, although motorhomes, van campers, 5th wheel trailers, and tent trailers are also utilised by RVers" (2013, p. 2). Apart, from these variations in term, there are some interesting differences in the way that caravanning, and camping more widely, operates in different national and cultural settings. Although this paper is principally focused in caravanning and the use of mobile homes for recreational purposes, it will also touch on situations where caravanning overlaps with other outdoor leisure settings (Hardy, Hansen, & Gretzel, 2012), but also where caravans are being used as a form of budget accommodation for the homeless and the poor. In the UK, it is estimated that there are 525 000 touring caravans, 114 000 motor homes, 327 000 caravan holiday homes and 112 000 residential-park homes (NCC, 2014).

Economic significance

The caravan industry contributes approximately £6 billion to the UK economy (NCC, 2014), employing in the region of 115 000 people in full and part-time roles, covering both the manufacture of caravans, and the operation of caravan parks. There are two major UK membership organisations. The Caravan Club specifically represents mobile home users and has approximately 375 000 members. The Camping and Caravanning Club is a little larger, with around half a million members, but these embrace a wider array of activities associated with outdoor hospitality (Brooker & Joppe, 2013). Over 1.5 million people in the UK are said to regularly take holidays in caravans and motorhomes (NCC, 2014). Caravanning is therefore, a major strand of UK tourism. Collectively, camping and caravanning accounted for 15.9 million vacations in 2012 according to Mintel (2013). 69.9 million nights away from home were spent on camping and caravanning trips, accounting for 19% of all nights away from home (including business and leisure), in the UK. Camping and caravanning is the fourth largest accommodation venue, after staying with friends and relatives, self-catering and hotels/guest houses, though this position changes when business travel is disaggregated from the hotels/guest houses sector. Thus, when considering nights away for leisure purposes, camping and caravanning would be the third largest accommodation venue.

Most nights away from home in the UK are associated with leisure activities – 55% of all nights away are linked to holiday whilst 93% (65.2 million) of all camping and caravanning nights away are due to vacations; 52% of these camping and caravanning nights are located at seaside venues; 25% are in countryside and village settings; and the remainder in urban locations. The dominant leisure purpose of camping and caravanning in the UK is reinforced by the fact that 94% of all these nights on campgrounds occur between April and October (NCC, 2014). In 2010, nights spent away from home accounted for £19.8 billion of which £2.3 billion was on camping and caravanning, and 94% of this was on leisure activities (NCC, 2014). In the USA there has been some recent growth in the outdoor hospitality market, Brooker and Joppe (2013, p. 1) report that camping grew from 39.9 million nights in 2011 to 42.5 million nights in 2012. Australasians are said to be the most committed campers, with researchers reporting that 86% of Australians and 80% of New Zealanders have visited an outdoor holiday venue at least once in their lifetimes (Brooker & Joppe, 2013).

The demand for caravan-based holidays is driven by an array of push and pull factors that have varied impacts in different cultural settings. The Mintel report (2013), looking specifically at the UK, shows that recent holiday experiences are pushed by budgetary considerations amongst a significant group of consumers. This has increased the number of holidays taken in the UK, and led to fewer holidays being spent overseas. On the other hand, the impact of poor weather has reduced the number of holidays taken outdoors. There is general support for outdoor vacations, although these will be pulled by different sets of values amongst consumers. For some, the outdoors represent a perception of clean air and open spaces, associated with a principled return to the open country-side as a consequence of city dwelling, pollution and confinement (Sijtsma, de Vries, van Hinsberg, & Diedriks, 2012). For others, caravanning and camping denote holidays that are a more affordable option during hard times. Indeed the Mintel (2013) report suggests that outdoor vacations have increased in response to the economic

downturn, growing unemployment, and static wages. In the British context, the essential pull factors of the perceived health and lifestyle benefits of the return to the great outdoors, together with the lower cost value of camping and caravanning are modified by the weather experiences (McCabe, 2009). The trends shown in Table 1 confirm these factors, as recent gains in market have been lost due to poor weather in the summer months of 2012.

The sector experienced steady growth between 2007 and 2011 as the number of trips rose by 6.5% from 15.9 million to 17.00 million in the domestic market responding to recessionary pressures. A significant proportion of the consumers substituted lower cost UK-based, out-door holidays for pre-recessionary international commercial settings. This growth in domestic camping and caravanning was all but wiped out by 2012, as domestic camping and caravanning dropped back to an estimated 15.9 million trips (Mintel, 2013). In 2012, the UK in general experienced its second wettest year, and England specifically suffered the wettest year since formal national records were started in 1910. Mintel's report (2013) suggests that these holidays dropped from a peak of 17.8 million trips in 2009, as the weather conditions deterred a significant number of the less committed camper/caravanners, and there was a higher than usual number of cancellations at these holiday locations. Within the wider market, domestic holidays fell by 1.7%, and camping and caravanning under-performed the market significantly. In this same year, overnight trips rose by 4.5% whilst other forms of service accommodation rose by 1.2%. Mintel reports that the sector has fared less well in each of the past five years, with the exception of 2009 when camping and caravanning increased by 21% compared with a 17% increase in domestic trips, in response to what the report calls, "a flight to value" that benefitted the sector in particular. Finally, the Mintel report highlights some interesting global figures, though the conflation of camping and caravanning does suggest a uniform response to the push and pull factors. This suggests the need for a more informed understanding of the varied responses to both the "flight to value", and the "flight from the weather" between campers and caravanners.

Campgrounds

The outdoor hospitality park sector resembles the wider commercial accommodation sector in that it is dominated by small firms operating a single venue, with a few large firms managing multiple sites. Mintel (2013) quotes figures provided by the trade association. British Holiday & Home Parks Association estimate there are 4 000 holiday parks in Great Britain, providing approximately 530 000 pitches. These would incorporate sites used for a variety of holiday types, that is, for fixed and temporary leases, and for tents and caravans.

The large corporate owners command the static caravan sector, incorporating permanent dwellings in the form of holiday homes and park homes. These sites are predominant in the holiday lettings market as they offer a wide array of facilities and services that provide added income to the static caravan leasing revenue. In addition, many of these parks will offer sites for temporary visitors in camping and caravanning formats. Table 2 lists the major holiday park operators, and it confirms the nature of the park operator supply. The fourteen park operators with more than two sites own 201 of the 4 000 holiday campgrounds.

In terms of revenue and customer numbers Haven Holidays is the largest of the UK holiday park operators, but the Park Resorts portfolio controls more actual sites across Great Britain (Mintel, 2013). Bourne Leisure owns Haven Holidays, and also runs Butlin's Holiday Centres and Warner Leisure Hotels. The third largest holiday park operator, Parkdean Holidays, has regionally focused sites in the south/south-west of England, south Wales and Scotland. Many of the other larger park operators are regionally focused around the south-west of England, south Wales, the Lake District and Scotland (Fidgeon, 1983). This concentration of ownership in a small number of large operators is shown to be more intense when their share of total pitches is considered. The fourteen operators listed in Table 2 control approximately one third of all UK camping and caravanning pitches.

Table 2: Leading UK holiday park operators, March 2013

Operator	Sites
Park Resorts, Ltd	39
Haven Holidays	35
Parkdean Holidays	24
Park Holidays UK, Ltd	23
John Fowler Holiday Parks	14
Darwin Holiday and Leisure Parks	14
South Lakeland Parks, Ltd	9
Haulfryn	7
Forest Holidays	8
Hoburne Holiday Parks	7
Holgates	6
Shorefield Holidays	6
Bunn Leisure	4
Beverley Holidays	3
Total	201

Source: Mintel (2013)

Table 1: Camping and caravanning trips taken domestically and overseas 2007–2012

	GB camping/ caravanning (m)	Index	Overseas camping/ caravanning (m)	Index	All camping/ caravanning (m)	Index
2007	15.9	100	1.2	60	17.1	96
2008	14.7	93	1.6	80	16.3	91
2009	17.8	112	1.9	95	19.7	110
2010	16.3	103	2.0	100	18.3	102
2011	17.0	107	1.9	95	18.9	106
2012(est)	15.9	100	2.0	100	17.9	100

Source: Mintel (2013)

The supply of UK camping and caravanning pitches has remained relatively stable, at around half a million, for some years because of planning restrictions on the development of new sites. As a consequence, much investment by park operators has been in improving facilities and amenities at the holiday parks so as to remain competitive. Initially there appeared to be some cut-backs as a consequence of the credit crunch, but there has been something of a pick-up in recent years. For the larger operators this has been directed at improving competitive advantage through the range of facilities and services on offer to clients. In-door swimming pools, restaurants and bars, children's play areas, etc., have all been added. For smaller operators their development activity has focused on providing more weather resistant stands, improved toilet and shower blocks, and electric hook-up facilities (Mintel, 2013).

Caravanners' profiles and motives

Camping and caravanning represent a major accommodation location in the leisure market in the UK, the third most popular location after "staying with family and friends". The demographic profile tends to cover all age brackets, with perhaps the exception of young adults aged 18-24. The sector tends to be family dominant, as adult couples with children in the family group are the largest segment. Hence the families focus of many outdoor hospitality locations. Couples without children are also a significant group, though their site choices and numbers of sites visited in each trip may be different than for family groups.

Seen from the outside, there may appear to be much uniformity across the typical towed caravan sector. The design has not differed substantially for decades, though the contents have become more elaborate in recent years, and the motorhome has been something of an innovation (Mintel, 2013). The smaller roads in the UK in particular, but across Europe in general have been a limiting factor, but not so constraining in the USA, Australian and New Zealand. That said, the caravanners themselves are quite diverse, with different demographic profiles and with different reasons for travelling, and different travel patterns.

Segmentation issues

The ways of segmenting these groups is also dissimilar. Southerton, Sove, Warde, and Deem (2003) suggest that their interviews with caravanners pinpointed four categories. "*Family fun seekers"* are those who rent static vans, normally at seaside locations. They usually are in family groups, including children, and are looking for a high level of entertainment both on-site and in the surrounding area. They are most likely to be looking for a low cost family holiday in a British location. This group is said to travel abroad for holidays infrequently, and to be more concerned to go to the same, or similar, locations where they are confident about the holiday experience they will receive, and are able to predict how much it will cost. The second group, according to Southerton et al. (2003), are "*activity seeking tourers"* who use caravans as a means of undertaking some other leisure activity. Here the caravan is a means to an end, enabling them to pursue their sporting or special interest leisure activity. The third group they called "*private relaxers*". These might be identified as the closest to our snail metaphor; they holiday in static or touring caravans and do not look for a high degree of entertainment or parks with modern and hotel like facilities. They do not readily look for sociable relations with fellow site guests. They want to keep themselves to themselves and probably avoid campgrounds that are used by families with younger children. The final group they labeled as "*enthusiasts*". These actively engage in a caravanning culture and for them the caravan is an important feature of their leisure time. They are likely to belong to caravan clubs, and attend meetings and rallies with other enthusiasts. The social aspect of engaging with other caravanners is an important part of the perceived benefit of caravanning (Hiemtun & Abelsen, 2012). These are polar opposites to the private relaxers, because the caravan in this back to nature experience is coupled with this communal dynamic.

Southerton et al., (2003) suggest that these market segments are likely to be found on different sites in different geographical locations. They quote several of their interviewees holding very negative views about each other. The family fun seekers and the private relaxers in particular, because of their polarity, see each other with antipathy. The fun seekers regard the private relaxers as "snobs"; and the private relaxers consider the fun seekers to be "louts" and "Butlin's types", as they quote one interviewee observing (Southerton et al., 2003: 3). This segmentation data is limited in this research because it does not provide much insight into the demographic segmentation characteristics of these groups, and suggests the need for research to deepen our understanding of the profiles of each of these clusters.

This segmentation of caravanners also impacts on the sites, facilities and designs noted earlier. Given the restrictions on parking a caravan in all but designated campgrounds, the nature of the sites and the facilities they promote to their clients is a means by which caravanners make selections about where to go. At one extreme, the park is highly organised with many on-site facilities; at the other end of the scale the facilities may be little more than a stand for the caravan, and a water tap. At its most basic, "all that distinguishes a site from the field next door is the label on the gate" (Southerton et al., 2003, p. 4).

Brooker and Joppe (2013) suggest a segmentation model that principally divides caravanners by the amount of time they spend in caravans. Short-term caravanners are most likely to be using the caravan for leisure purposes at weekends or for holidays. They cite research from the United States that clusters these leisure campers into five groups: *average, parents*, *partyers*, *soft rugged,* and *extreme*. The *average* segment gives high priority to the outdoor hospitality experience. The implied "back to nature" is a key strand of the appeal, together with the tradition of the tent, the campfire, and mixing with others in these temporary communities. Caravanners in this group have opted for the comfort of the caravan as opposed to the tent but are still driven by these images. Brooker and Joppe suggest there is a contradiction in that, whilst the appeal appears to be for simplicity, these visitors are also interested in facilities and modern conveniences on campsites. The *parent* group, as the name suggests, are families travelling with children. Here the appeal is the perceived healthy benefits of the outdoors, spending time together as a group, in addition to the lower

cost of outdoor hospitality. They are typically looking for sites with an array of indoors leisure facilities that act as a refuge when the weather is inclement. *Partyers* overlap with Southern et al's (2003) *family fun seekers*, and are engaging in camping or caravanners as a means of undertaking some other leisure activity, attending a musical festival, etc. The *soft rugged* segment is described as, "mature campers who purposely overcome traditional camping irritations by utilising recreational vehicles, caravans and cabins which act as a home away from home". Again, this compares with the segment described in the Southern et al. model as *private relaxers*. Finally, the *extremes* are usually undertaking outdoor leisure pursuit that involves an activity such as climbing. They typically avoid the more developed campsites and are looking to something perceived to be more authentic and closer to nature.

Brooker & Joppe (2013) suggest two other segments in addition to the short-term segment. Caravanners and campers may also be segmented as full-time and long-term. Full-timers are those who live permanently in their caravan, motor home, holiday home, or park home. These can be further differentiated between those who reside on one site and rarely move, and those living in their caravan or motor home but who do move around. In Australia, some 65 000 live permanently on a campsite, due to a cluster of benefits including lower cost, location, or proximity to family and friends (Newton, 2008). In the UK, there is growing evidence that people are being placed in this form of accommodation as lower cost means of housing the homeless, unemployed, and poor (Brooker & Joppe, 2013). In addition, there are those who live permanently in caravans or motor homes, but who travel around in pursuit of freedom and interest of experiencing the environmental variation found in different locations (McKercher, 2001).

Long-term occupants are those who stay on a park for long periods to benefit from particular seasons and to benefit from, or to avoid, certain locations because of weather or other holidaymakers. In Australia and New Zealand these are called *grey nomads* (Holloway, Green, & Holloway, 2011). They are said to travel north in the winter months and will probably stay at several different locations during their travels. In the USA and Western Europe, *winter snowbirds* (Prideaux, Wei, & Rys, 2001) move to one location and stay at the one site once they have reached their desired location. This pattern of seasonal and long–term uses also occurs in the summer months where caravanners may stay on a park because of proximity to a desired location, during the summer months, using it for both longer vacations and for short breaks (Prideaux & McClymont, 2006). The point is that they all use the caravan or motor home as a semi-permanent home which can be moved, but which is located at the same campsite for a long period (Glover & Prideaux, 2009). Brooker and Joppe also suggest that there are additional long-term occupants who are using the caravan, or other dwelling, on the campsite because they are working locally and who are using this accommodation to meet temporary needs due to availability, location, or its lower cost than accommodation in bed and breakfast, guest houses, or hotels.

Table 3 reproduces the Mintel report findings identifying the numbers who had been on an outdoors hospitality vacation in the past three years. Just over four in ten have taken some form of camping or caravanning holiday. The table indicates that a significant number have engaged in more than one of the activities. Hence those who have used a caravan or motorhome in the last three years are reported by 34% of the 2000 respondents. Though the largest number report having stayed in a static caravan or mobile home, a mere 5% say they have engaged in touring with caravan or motorhome in the past three years and this has to be seen as a minority activity according to the Mintel study. Overall, most British participants have experienced camping and caravanning. Seven in ten have experienced outdoor hospitality at some point. Interestingly, of the 30% in the UK who report never having stayed on a camp or caravan site, the vast majority (24%) state they have no interest in doing so. This is interesting when compared with the high degree of involvement reported by Australians and New Zealanders mentioned above.

The demographic profile of campers identified in the Mintel research suggests that over half of their interviewees under 35 years of age have undertaken a camping or caravanning holiday in the past three years. This amounts to just over four in ten of those aged between 35 and 54 years, and to a little over a quarter of those who are 55 plus. However, camping is much more skewed towards the younger age groups and fewer of the older age groups report having stayed under canvas. Just 6% of those over 55 have stayed in a tent in the

Table 3: Camping and caravanning experience over the past three years (January 2013)

Type of experience	%
Any camping or caravanning in the past three years	43
Camped in a tent	23
Stayed in a static caravan/"mobile home"	20
Camped at a music festival	8
Stayed at a friend's/relative's caravan/mobile home	6
Camped somewhere as part of a backpacking trip	6
Stayed in a towed caravan	5
Stayed in a motor home (i.e. motorised recreational vehicle or camper van)	3
Been on a "glamping" holiday (i.e. stayed in a yurt, eco-dome, Romany caravan, wigwam, etc.)	3
Been on another form of type of camping or caravanning holiday	4
I have taken a camping or caravanning holiday but not in the past three years	27
I have never taken a camping or caravanning holiday but would like to	6
I have never taken a camping or caravanning holiday and do not wish to	24

Source: Mintel (2013)

past three years, which implies that the remainder stayed in a caravan or motor home in one form or another.

In general, camping and caravanning appears to be undertaken by a wide range of socioeconomic groups, encompassing ABs, C1s and C2s with a slightly smaller proportion of DEs. The Mintel reports states: "Camping and caravanning is a 'great leveller', an attraction for some and a deterrent for other, more status-conscious, holiday makers" (2013, p. 72). That said, there are some interesting differences in preferences for the various outdoor formats. Whilst ABs, and to a lesser extent C1s, tend to favour camping as a means of getting back to nature, C2s, Ds and Es are more likely to take holidays on campsites which have one other of the static caravan/lodge formats. They are looking for sites with a good array of entertainment facilities and they are more likely to stay on site rather than touring the local environment. These sites resemble traditional holiday camps. When ABs stay in caravans or other static formats, these are likely to be located in sites with forests, or in rural settings.

The Refuseniks

Almost six out of ten interviewees (57%) who had not taken a camping or caravanning holiday in the past three years included three interesting sub-groups. Mintel suggests "*lapsed campers/caravanners*" are 27% of consumers who have previously been on this form of holiday; "*camping and caravanning refuseniks*" are the 24% of consumers of have not been on a camping/caravanning holiday and have no intention of going on one; and "*virgin campers/caravanners*" represent the 6% of consumers who have never been camping/caravanning, but would like to do so.

The Mintel research explores further the reasons for not taking a camping or a caravanning holiday in the past three years. Almost half of these (47%) say that they prefer to stay in hotels. Another substantial group (38%) say that the lack of comfort puts them off, and another 34% say the weather is a deterrent. There is clear competition from the permanent structures in the form of rented apartments, and cottages etc., as this was cited as a preference by a third of respondents in the Mintel study, and just over one fifth (22%) said the lack of space offered by tents and caravans was also off-putting. Being the wrong age was given as the reason for not taking this form of holiday by just over one in five (22%). This rose to 50% of respondents who are 65, or over. Although these are cited as specific reasons for not taking holidays in this way, they tend to overlap around three broad themes. The limited accommodation structures offered by tents and caravans push consumers to holiday in accommodation that will give them more space, facilities and comfort. The second is the pull factor that hotels and guesthouses offer services where domestic duties such as cleaning and cooking are catered for, and family members can spend time away from these domestic tasks. Thirdly, the weather is a factor that can be a permanent deterrent for some, and a flexible deterrent to those who might go on this form of holiday when weather patterns are favourable. Table 4 highlights an interesting comparison of how these groups respond to the questions asking for their reasons for not taking camping/caravanning holidays.

Table 4 shows some similarities and differences between the various sub-groups. Those who have never been on this kind of holiday and have no interest in going register stronger preferences for staying in hotel and guesthouse accommodation. The lack of comfort, the weather, the work involved and the other campers/caravanners all attract more support amongst this group. The other interesting response in Table 4 is those who had not been on this form of holiday but would like to go on one, stating their reason as being because they could not afford to go. Mintel states, "Some 20% of DEs who have not been camping/caravanning in the past three years cite, 'I couldn't afford to go' as a reason. The minority of adults who have never been but would like to

Table 4: Reasons for not taking camping/caravanning holidays, by sub-group, January 2013. Base: 1 150 internet users 16+ who have not been on a camping/caravanning in the past three years

Sample size	All 1,150 %	I have taken a camping or caravanning holiday but not in the past three years (%) *n* = 546	I have never taken a camping or caravanning holiday but would like to (%) *n* = 129	I have never taken a camping or caravanning holiday and do not wish to (%) *n* = 475
I prefer to stay in a hotel/guest house when I am on holiday	44	43	29	50
The lack of comfort puts me off	38	34	25	47
The weather puts me off	34	32	31	37
I prefer to stay in other types of self-catering accommodation (e.g. cottage, flat, chalet) when I am on holiday	33	38	31	29
I'm the wrong age for this sort of holiday	22	25	6	23
The lack of space puts me off	22	20	14	25
There's too much work involved	18	18	10	20
I wouldn't like being with lots of other people on a camp/caravan site	14	11	8	19
I couldn't afford to go	13	16	21	8
The rising cost of petrol has put me off	6	8	5	5
I prefer to stay in hostel accommodation when I'm on holiday	6	4	9	8
None of these	12	11	16	13

Source: Mintel 2013

go are also more likely to cite this reason" (Mintel 2013, p. 82). They go on to say that around one in four British adults did not take a holiday in 2012. Recent economic conditions and government austerity measures have been said to have pushed more people out of the holiday market over the last few years.

Towards a research agenda

Caravanning is a significant element of outdoor hospitality (Brooker & Joppe, 2013), yet the amount of research undertaken with the specific intention of exploring caravanning and caravanners is limited. This research note has sought to discuss a sample of those studies that have been published, as well as highlight potential gaps in knowledge, and suggest themes for future research.

Theme 1
The Mintel (2013) report covers many common overlaps, but is limited by the fact that its key audience is the outdoors hospitality industry and thereby, those who own and operate campsites. Many of the observations conflate tent-based and caravan-based vacations, with little insight into the latent differences between the two. For example, the report highlights the influence of weather on outdoor hospitality but implies that demand for vacations in tents and in caravans are equally impacted by inclement weather. That may well be, but there is limited detailed evidence of the impact of weather factors on the different groups.

Theme 2
Whilst the Mintel report gives many valuable insights, it can also be criticised for its lack of detail about the caravanners and how they use the various caravan formats. The report does hint at behavioural segmentation as it suggests a range of behaviours for which campsites are used, but these are limited in the detailed linkage of demographic segmentation to the formats. Socio-economic, demographic and family life-cycle issues are examples of some of the factors that are touched upon, but with little detailed evidence of the linkage to use patterns.

Theme 3
The National Caravan Council has an industry profile and builds an important picture of the caravan industry, particularly the caravan supply sector, and thereby campsite accommodation variants. It also offers a website that can be accessed by club members to assist with site locations and plan vocational journeys. Whilst recognising the value of this from an industry perspective, it can also be criticised because of the limited insight it provides of the caravanners and the segmentation of usage, demographics and the key importance of values of those who engage in outdoors holidays. The work of Schwartz (2012) might be useful in this latter topic because it would help establish the importance of the "great out-doors" amongst other influences, to different groups of caravanners. Further research is needed into who does what, how, with whom, and why? Southerton, Sove, Warde, and Deem (2003) do suggest another model for understanding the behaviours of caravanners that can be compared with the Mintel model, but it is limited in scope and coverage. It was undertaken in the north west of the UK and needs to be tested against larger geographical national and international settings.

Theme 4
Whilst this piece has provided some insights from international contexts, it has been concerned principally with the identification of research within the UK. Fundamentally, there is a need to disaggregate outdoor hospitality as it applies to vacations under canvas and those involving the various caravan formats. The impact of weather is clearly an issue, but trends with the various caravan types highlighted by the NCC and the segmentation dimensions of the users also need more detailed research. Segmentation characteristics of different caravanner groups has to be an urgent issue, because the limited studies touched on above tend to define segments using somewhat simplistic behavioural segments, with limited insights into how these are reflections of demographic profiles.

Theme 5
Following from this, studies contrasting and comparing caravanning and caravanners across various international contexts need to be undertaken. The earlier discussion does suggest a number of differences in the way caravanning is used and enjoyed in different national settings. For example, many more Australians and New Zealanders have at some time been on campsite holidays than their British counterparts. Also the usage of caravans and campervans does seem to be different in the UK and Europe than in Australasia and the USA. Hence, in the longer term, there should be an international comparative study of caravanning and caravanners.

Theme 6
Finally, campsite suppliers also offer some interesting research opportunities. The data associated with Table 2 indicates that the majority of the UK's 4 000 campsites are individually owned and operated by entrepreneurs with just one site. Yet just fourteen firms control over 200 campgrounds and over 30% of the pitches. There is therefore a high degree of ownership concentration, with a large number of firms being small suppliers operated, in most cases, by owner managers (Andersson, Carlsen, & Getz, 2002). Like the wider hospitality industry (Lashley & Rowson, 2010) many of these are likely to be "lifestyle entrepreneurs", who are not principally driven to maximise economic gain. Although tangential to the proposed issues associated with understanding caravanning and caravanners, a more informed insight into campground ownership also offers an interesting research agenda.

Conclusions

Whilst the snail metaphor may be a little too flippant for some observers, it does hint at some interesting contradictions in caravanning as a leisure activity. Like tent dwellers and other campground holidaymakers, caravanning represents a strong pull to open spaces, and getting back to nature, with the mobility opportunities of holidaying in a variety of locations along with the lower costs of vacations on these sites. Yet caravanners are getting back to rural settings accompanied

by the comforts of home, or at least a representation of the comforts of home.

This paper has suggested that caravanning and caravanners should be disaggregated from research on outdoors hospitality because it encompasses some unique dimensions that are often obscured in some of the major reports conducted by the National Caravan Council and Mintel. These principally industry-focused reports often do not provide enough insights into the market segments and demographic profiles of the caravanners, nor of the campground operators.

The paper has highlighted the need for a series of research studies that initially focus on generating more information about the UK context, but then on moving on to improving understanding of the similarities and differences to be found in different national and cultural contexts. The nature of caravan and motor home formats as well as variations in the occasions in which these are used, and by whom, all offer interesting topics for research contrasting and comparing international contexts.

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Brand performance of Chinese domestic vs. international hotels: Perceptions of operators as well as domestic and foreign guests

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The significant differences in financial performance between internationally branded hotels and domestically branded hotels in China inspired this study. As part of the research, we surveyed hotel operators and guests on their perception of brand performance of the hotel they managed and stayed at, respectively. Results showed that managers of internationally branded hotels were more positive about their brand performance than the guests were, whereas managers of domestically branded hotels had a similar, or sometimes lower, assessment of their brand performance. Surprisingly, from the guests' perspective, domestic hotels received higher ratings on brand choice intention and brand loyalty, while receiving similar ratings on all other brand-related measurements, as compared to international hotels. Significant differences were also found in brand quality, trust in management, and reliability among the sub-samples. Chinese guests rated these components lower for both internationally and domestically branded hotels, while foreign guests showed stronger intentions of choosing the same domestic brand in the future. We discuss the implications for both international and domestic hotel operators.

Keywords: brand performance, brand equity, China hotel, international hotel brand, domestic hotel brand

Introduction

In the twenty-first century, economists expect China and India to be the new emerging economies (Weidenbaum, 2004). Since the beginning of the 1980s, major hotel chains have been shifting their interest from the mature markets of the USA and Western Europe to the rapidly developing countries of Asia, particularly China (Wu, Costa, & Teare, 1998). The improvement in the economic outlook of China has been the most important deciding factor when multinational hotel chains entered this market. The rising social prosperity as a result of the rapid economic growth facilitated the continuing expansion and confidence of multinational hotel chains in China's hotel market. Driven by the country's economic performance, its political stability, and its desire to benefit from an increasingly affluent domestic population as well as from the influx of foreign corporate travellers, hotel investors and operators alike have been competing for a market presence in China. China's entry into the World Trade Organization, Beijing's hosting of the 2008 Olympic Games, Shanghai's hosting of the 2010 World Expo, and Guangzhou's hosting of the East Asian Games in 2010 provided additional impetus for entering into China's hotel market.

Due to its rapid economic growth and tourism development, hotel investors and operators regard China as a fertile land for the hotel industry. Beijing Jianguo Hotel opened in 1982 under a management contract with the Hong Kong Peninsula Group, which marked the debut of international hotels in China. In 1984, Holiday Inns opened its first hotel in China, and major international hotel chains began making their presence felt. Two decades later, about 10% of the world's top 300 corporate chains, as ranked by the *Hotels* magazine in 1999, had entered China (Pine, Qiu Zhang, & Qi, 2000). When Comfort Inn Beijing, a member of the Choice Hotels International, opened in March 2003, all of the top ten hotel brands in the world had their presence in China.

China's hotel industry has a relatively short history. When China announced its economic reform policy (also known as the open-door policy) in 1978, there were only 137 tourist hotels with 15 539 rooms nationwide (China National Tourism Administration, 2003). The shortage of hotels became the major urgent issue concerning the successful development of the international tourism industry. Thus, many indigenous hotel chains were formed on the basis of administrative convenience rather than of market-driven strategic considerations; for example, the telecommunications, utilities, aviation, petroleum, railway, finance, postal service, human resource, and education sectors all operated their own hotels. In spite of the great rate of expansion, all sorts of protectionism, barriers, and government control have bottlenecked the development of the hotel industry. This has become the greatest disadvantage for domestic hotel chains.

Today, all major international hotel chains have entered the Chinese market with ambitious expansion plans; for example, as of July 2014, Marriott International had 74 member hotels in China, the InterContinental Hotels Group had 213, and Accor had 128. According to the China Tourist Hotel Association and Horwath Asia Pacific (2014), China had 444 five-star and 179 four-star hotels in 2013, with 151 477 and 48 330 rooms respectively. This represents a significant increase from 2005, when it had 142 five-star and 193 four-star hotels and 53 027 and 52 099 rooms respectively; the increase is especially large in the five-star category. International hotel companies managed over half (299 or 67.3%) of the five-star

hotels, whereas Chinese hotel companies and independent owners managed the remaining hotels (108 or 24.3%, and 37 or 8.3%, respectively). Thus, it is apparent that international hotel companies have a strong foothold in the Chinese market.

With the rapid growth in both the number of hotels and the number of hotel rooms, the competition became intense. In some Chinese cities, the hotel market is actually quite saturated. In 2013, the average occupancy rate for all five-star hotels was 55.7% and that of four-star hotels was 63.2% (China Tourist Hotel Association and Horwath Asia Pacific, 2014). Regardless of management type, a low occupancy rate prevails; for example, the occupancy rate for internationally managed five-star hotels was 55.7%, for domestic chain managed hotels it was 54.7%, and for independently managed hotels it was 58.4%. However, internationally managed hotels commanded a much higher average daily rate (ADR) at RMB875 (approximately US$143) in 2013; 50% higher than the rate of domestically managed hotels (RMB584 or US$95) and 41% higher than the rate of independently managed hotels (RMB621 or US$101). Internationally managed properties also achieved better performance in terms of income before fixed charges and management fees (IBFCMF), as well as in terms of earnings before interest, tax, depreciation, and amortisation (EBITDA). Table 1 shows the hotel industry's development and performance from 2005 to 2013. Figure 1 illustrates the differences of ADR among three categories of hotels from 2005 to 2013.

One possible reason for the differential performance between domestic and international hotels could be the branding effect of internationally managed properties that carry well-known international hotel brands. Past research has indicated that brand equity is positively related to a hotel company's financial performance (e.g., Kim, Gon Kim, & An, 2003) and that consumers are willing to pay a price premium for brands they view as being high in quality (O'Neill & Mattila, 2006). Brands and branding strategy have played a significant role in the hospitality industry in the past thirty years in the Western world; however, it is a relatively new concept for Chinese domestic hotel companies.

Hotel branding studies

Branding has emerged as a top hotel management priority in the past two or three decades as a result of the increasing realisation that brands are one of the most valuable intangible assets of a firm. As with other assets, hotel operators should carefully and continuously manage their brand to optimise its value (Aaker, 1991). Punj and Hillyer (2004) defined brand equity as the overall value created by a brand. Aaker, who conceptualised brand equity from a managerial and corporate strategy perspective but relied on consumer psychology principles (Keller, 2002), defined brand equity as: "A set of brand assets and liabilities linked to a brand, its name and symbol, that add to or subtract from the value provided by a product or service to a firm and/or to that firm's customers" (Aaker, 1991, p. 15). Keller (2003, p. 42) also offered a similar view on the basic principles of brand equity in that brand equity (1) was the added value resulting in different marketing outcomes, (2) provided a common denominator for interpreting marketing strategies and assessing the value of a brand, and (3) reflected the value of a brand that could be

Exhibit 1: Hotel performance in China by category

	5-star										4-star									
	2005	2006	2007	2008	2009	2010	2011	2012	2013		2005	2006	2007	2008	2009	2010	2011	2012	2013	
Internationally managed or branded hotels																				
No. of hotels	88	97	92	152	186	228	270	263	299		51	46	49	68	68	65	69	75	78	
No. of available rooms/day	32 817	37 028	34 865	59 799	74 321	87 264	98 935	94 258	105 638		16 341	15 517	14 922	20 757	21 367	18 420	20 566	22 993	23 846	
Occupancy rate (%)	69.6	66.9	63.4	52.9	51.5	58.6	58.5	56.3	55.7		73.1	71.4	70.6	57.0	57.7	66.4	65.8	63.9	63.5	
Average daily rate	946	940	1,014	1,063	819	899	905	908	875		539	578	584	623	474	517	523	549	546	
Income before fixed cost and management fees, % total revenue	46.4	45.5	43.5	40.4	33.4	39.9	37.8	34.8	32.7		35.1	36.6	36.0	32.0	25.4	34.6	29.6	31.8	30.9	
Domestically managed or branded hotels																				
No. of hotels	24	45	55	76	61	79	98	78	108		53	66	66	88	64	92	88	65	62	
No. of available rooms/day	10 129	13 835	17 057	24 114	18 320	24 318	31 463	26 029	34 061		14 634	17 512	15 775	26 463	16 228	22 031	21 664	16 634	15 511	
Occupancy rate (%)	69.3	66.9	64.5	54.3	55.5	61.6	62.6	60.0	54.7		68.9	68.6	66.7	61.5	57.2	63.8	63.9	60.4	61.6	
Average daily rate	657	563	618	624	538	552	609	638	584		417	400	448	468	396	423	432	423	454	
Income before fixed cost and management fees, % total revenue	35.2	36.8	37.2	36.1	34.2	32.4	32.7	33.4	27.0		32.8	32.2	31.7	31.4	26.7	26.7	25.2	25.2	26.3	
Owner (or owner's management team) managed																				
No. of hotels	30	30	39	48	71	58	63	39	37		89	93	101	94	103	86	87	68	39	
No. of available rooms/day	10 081	10 793	12 239	16 304	23 533	20 149	19 330	14 015	11 778		21 124	21 415	23 488	21 616	22 783	22 745	19 110	17 797	8 973	
Occupancy rate (%)	62.6	63.6	64.4	54.7	51.0	60.1	61.8	58.5	58.4		67.6	68.7	64.6	62.1	61.2	63.7	67.2	63.2	65.3	
Average daily rate	482	584	582	647	593	627	635	673	621		359	361	374	414	358	404	410	414	434	
Income before fixed cost and management fees, % total revenue	33.2	29.7	33.7	28.1	31.2	30.1	28.6	28.1	23.0		26.1	24.9	28.8	28.5	27.4	28.1	23.2	20.6	23.3	

Source: China Tourist Hotel Association and Horwath Asia Pacific (2006–2014)

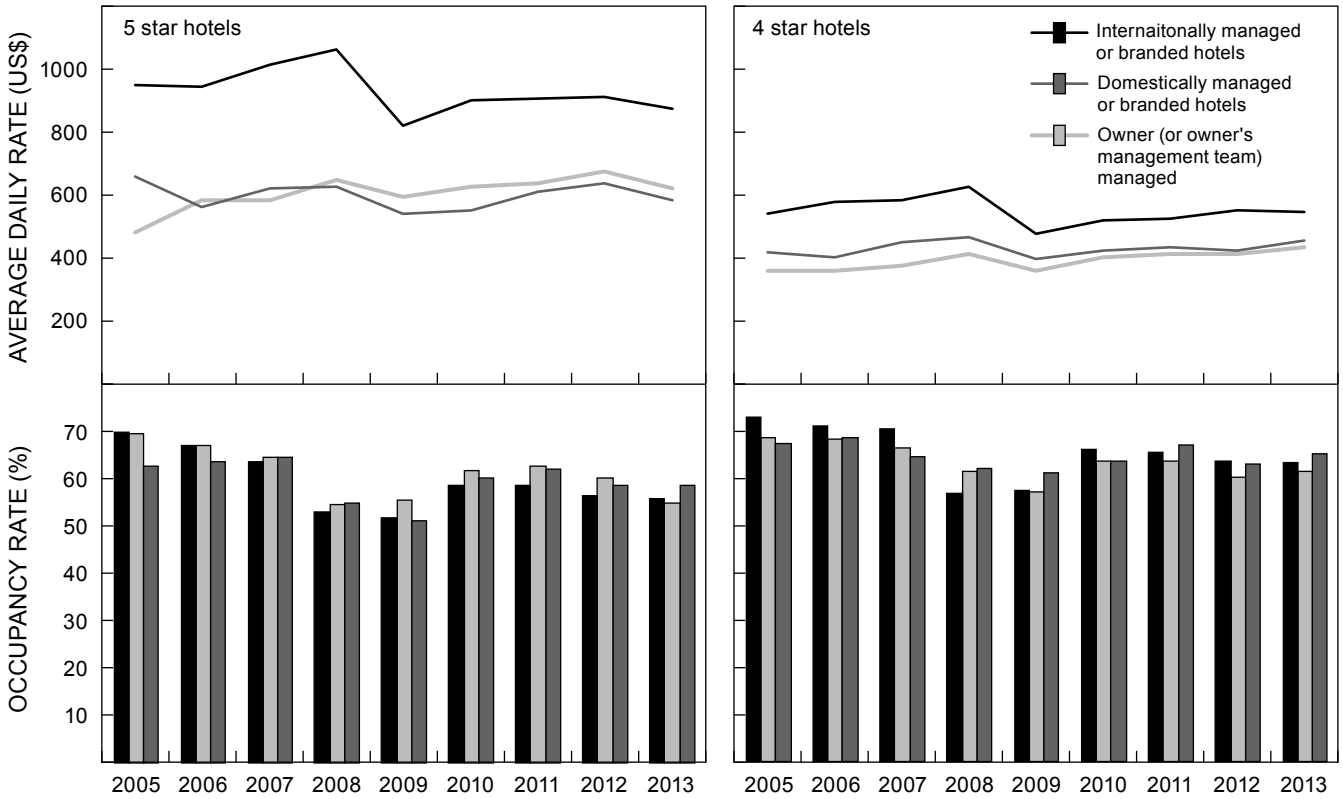

Figure 1: Hotel ADR and occupancy rate by category

created in many different ways. Based on a review of literature and a survey of hotel consultants, Bailey and Ball (2006, p. 34) proposed that: "Hotel brand equity represents the value that consumers and hotel property owners associate with a hotel brand, and the impact of these associations on their behaviour and the subsequent financial performance of the brand."

From the customer's perspective, brands can simplify choice, promise a particular level of service or quality, reduce risk, and engender trust (Keller & Lehmann, 2006). Bailey and Ball (2006) stated that lodging is a brand equity business, primarily due to the intangibility and heterogeneity of services and parity of products. The intangible nature of hospitality service presents challenges for operators to communicate and for guests to evaluate the value of offerings. Strong brands enable guests to better visualise and understand the intangible services (Kayaman & Arasli, 2007, Berry, 2000). The heterogeneity of services makes it difficult for guests to predict the exact service that they will receive and creates, therefore, a higher level of perceived risk. Buying from familiar and trusted brands can effectively reduce perceived risks (Kayaman & Arasli, 2007, O'Neill & Xiao, 2006). Product parity makes branding a particularly important differentiation strategy. In the various service industries, brand equity has been shown to influence consumer preferences (Chang & Liu, 2009), satisfaction (Grace & Cass, 2005, Nam, Ekinci, & Whyatt, 2011), loyalty (Nam, Ekinci, & Whyatt, 2011, Wang, Hsu, Hsu, & Hsieh, 2011), and behavioural intentions (Chang & Liu, 2009, Grace & Cass, 2005).

Aaker (1991) suggested that the nature of brand equity varies from context to context. Thus, hospitality researchers have engaged in brand equity inquiries with hotels as the specific context. O'Neill and Xiao (2006) examined the role of brand affiliation in hotel market value from an owner-investor perspective. Results showed that the effects of branding were most noticeable in midmarket and upscale hotels. Kim and Kim (2005) connected brand equity with the financial performance of hotels. They defined brand equity as a four-dimensional construct, including brand loyalty, brand awareness, perceived quality, and brand image. Their empirical study found that all but brand image were positively related to the selected hotels' revenue per available room (RevPAR).

Because building and managing brand equity is considered as a key determinant of success within the hotel industry, and before we can effectively manage the brand or increase the value of a brand, we have to be able to measure the brand value or brand equity. Prasad and Dev (2000) proposed a framework for assessing hotel brand equity. The aim of the framework was to offer hotel executives a diagnostic tool to help them maximise their brand value. Although no specific rationale was given as to the selection of brand equity measurement elements, Prasad and Dev operationalised the brand equity index to include measurements of customer satisfaction, return intention, price-value relationship, preference, and brand awareness. They demonstrated the calculation of the index with hypothetical findings from a consumer survey using hypothetical brands. This represents one of the earliest attempts to quantify lodging brand equity.

So and King (2010) empirically validated Berry's (2000) service-branding model in a hotel context. They used the "company's presented brand", "external brand communications", and "customer experience with company"

as antecedents of brand awareness and brand meaning to lead to the final outcome variable of brand equity. Hsu, Oh, and Assaf (2012) proposed and empirically tested a customer-based brand equity model for upscale hotels, with new dimensions of brand equity specifically derived from the hotel industry. The model showed brand equity to be composed of six dimensions, with the first five dimensions (perceived quality, brand awareness, brand image, management trust, and brand reliability) as determinants of the final dimension, brand loyalty.

Cross-cultural studies

Reisinger and Turner (2002a, 2002b) opined that consumers' perception, impressions, and interpretations of objects are highly dependent on their cultural background. Schiffman and Kanuk (1994) and Triandis (1982) also argued that most behavioural theories are rooted in psychology, which is heavily bound by cultural values. Therefore, consumers from different cultures are likely to perceive marketing related messages, including brand projections, differently. For example, Yoo and Donthu (2002) found differences between American and Korean samples in their brand equity formation process. Specifically, store image, perceived quality and brand loyalty played different roles between these two cultural groups in their overall brand equity perception. In a hospitality context, Guillet and Tasci (2010) provided evidence, from a study of Disney-McDonald's alliance by surveying Western, Asia-Pacific, and Chinese consumers, that individuals from different countries or cultures may have different brand associations.

Due to the limited number of cross-cultural studies on branding, research in related fields may shed some light on the impact of culture. One such area is service encounters and service failure. Furrer, Liu, and Sudharshan (2000), analysing a sample consisting of Western and Asian nationalities, showed that the importance of SERVQUAL dimensions is correlated with Hofstede's cultural dimensions. Matos, Fernandes, Leis, and Trez's (2011) survey of consumers from Brazil, France, Italy, and the Netherlands showed that the effect of perceived justice on satisfaction with service recovery, and the effect of satisfaction with service recovery on behavioural intention, was moderated by different cultural orientations.

A study of a country park in Hong Kong showed that culture exhibited significant effects on perceived service quality, satisfaction, and behavioural intention (Li, Lai, Chick, Zinn, & Craefe, 2007). Matilla and colleagues conducted a series of studies on the impact of culture on service evaluations. Matilla (1999) demonstrated that Western and Asian luxury hotel users relied on different attributes in evaluating the value of service. Matilla (2000) further suggested that customer evaluations of service encounters may be culture bound. In particular, Asian travellers gave significantly lower ratings to the service provider in both the hotel and fine dining settings. From a later study in the restaurant setting, Mattila and Patterson (2004) reported differential sensitivity of East Asian and American consumers to situational constraints, which influenced their attributions for service failures and moderate their satisfaction with the service recovery process.

Service provider vs. customer perceptions

De Chernatony and colleagues published a series of conceptual papers arguing for the importance of examining both the internal and external stakeholders' views of a brand. de Chernatony and Riley (1998) conducted content analysis of more than 100 research articles and interviews with 20 leading brand consultants and proposed a balanced interpretation of brands drawing on both firms' and consumers' perceptions. De Chernatony and Harris (2000) and de Chernatony (1999) further proposed a model that stresses the importance of congruency between the internal and external stakeholders' views. Nandan (2005) and Burmann, Jost-Benz and Wiley (2009) echoed the necessity to use an integrated approach to examine brand equity, including both internal (i.e., brand identity) and external (i.e., brand image) views.

Albeit the calls for comprehensive research covering both firms' and customers' views on brand equity, empirical studies are limited and practically non-existent in the hospitality field. Davies and Chun (2002) found differences in brand perceptions between employees and customers of two department stores. Yaniv and Farkas (2005) identified relationships between employees' and customers' brand perceptions in a toy and game retail store. In the hospitality context, empirical studies involving both firms' and customers' perspectives are limited to service quality issues. Tsang and Qu (2000) found that managers overestimated the service delivery compared to guests' perceptions of the service quality in the hotel industry in China. Santos (2002) showed that service providers perceived the tangible dimension of service quality to be less important than did consumers in the restaurant sector. Ingram and Daskalakis (1999) found a divergence between the perceptions of service quality of hotel guests and managers, and that the greatest gaps existed in hotels of the highest quality classification.

The literature review above clearly demonstrates two research gaps in branding research. One relates to cross-cultural investigation, the other involves service provider and receiver comparison. The current study contributes to both areas in need of attention.

Purpose of the study

O'Neill and Mattila (2010) conducted a comprehensive review of the hotel branding literature and development in the past 25 years. They concluded that researchers have examined how brands influence top- and bottom-line revenues as well as overall asset value, and that existing research on hotel branding is heavily focused on US brands. They suggested further investigations of the phenomenon in Asia and the examination of branding issues from more cross-cultural perspectives. A comparison of lodging brand equity ratings between Asian and Western guests would make a contribution in answering this call. Although Hsu, Oh, and Assaf (2012) reported the testing of a brand equity model that performed well across cultures, a close examination of the ratings by respondents of varied cultural background was not conducted.

Looking at the figures presented in Exhibit 1, one might raise several propositions; for example, if consumers perceive domestic Chinese hotel (CH) brands as less competent in providing a good lodging experience, they would be less willing to pay a high rate for their stay. On the other hand, if operators

of CH brands are less confident in their ability to manage properties and provide a good lodging experience, they would be hesitant to charge a rate similar to that of internationally managed hotels (IH). Thus, it is important to understand brand perceptions from both operators' and guests' perspectives.

Based on the research gaps identified in the literature, we surveyed both hotel operators and guests to investigate brand performance of Chinese domestic and international hotels based on perceptions of operators as well as domestic and foreign guests. A comparison was made between operators and guests, and between guests of different cultural backgrounds. Specifically, the objectives of the study were to identify (1) hotel operators' perceptions of their own property's brand-related performance, (2) hotel guests' evaluations of brand-related performance of the hotel they stayed at, and (3) differences in hotel operators', domestic guests', and foreign guests' perceptions of the respective hotels they evaluated.

Methodology

Most established IH in China are upscale properties, either formally rated by the China National Tourism Administration as four- or five-star hotels or non-rated by choice but having equivalent qualities of four- or five-star properties. The economy segment of the hotel industry only emerged recently in the Chinese market and so has very few IH brands; thus, the focus of this study was on upscale hotel brands at the four- or five-star level.

We conducted two focus group interviews – one with domestic travellers and one with foreign travellers – as part of the guest questionnaire development process. Based on the results of the focus group interviews, and a review of the branding literature, we developed a questionnaire containing multiple items for each of the following constructs: brand choice intention, brand loyalty, brand quality, brand awareness, brand image, management trust, and brand reliability. We customised the guest questionnaire for each hotel to include its name so that the evaluation was specifically about that property. We developed the questionnaire in English and translated it into simplified Chinese using the translation-back-translation procedure. A previous study tested the reliability and validity of the brand-equity measurement used in the guest survey (Hsu, Oh, & Assaf, 2012) and concluded its validity across gender, country of origin, and past brand experience. The operator questionnaire was shorter and included 18 selected brand performance measurement items used in the guest questionnaire. We asked the operator of each hotel to evaluate their own brand.

A convenience sampling approach was used for the study with some safeguards to alleviate sampling bias installed. Efforts were made to include properties from both well-developed, first-tier coastal cities as well as less developed second- and third-tier inland cities. Corporate and regional offices were asked to nominate up to two properties under each brand to participate in the study so that as many different brands could be represented as possible. We contacted five major CH corporate offices, two regional offices of large IH corporations, ten hotel property-level senior managers, and the International Branded Hotels Shanghai for their support of the project. The effort resulted in the agreement of participation from thirty-two properties. We sent a set of questionnaires (one Chinese and one English operator questionnaires, and thirty English and thirty Chinese guest questionnaires), a survey instruction, a cover letter, and forty-five small gifts to those thirty-two properties. We instructed the operators to complete the operator questionnaire using the language version of their choice, to pre-identify twenty domestic and twenty foreign guests based on check-in records, and to hand the appropriate language version of the questionnaire to those guests the night before their departure. The front office staff distributed the questionnaire in an envelope and we asked the guests to seal the completed questionnaire in the return envelope and to hand it to the front desk. We asked the operators to continue distributing the questionnaires in the same manner until at least twenty domestic and twenty foreign guests had completed the survey. The operators returned the completed guest and operator questionnaires by mail.

Results

Of the thirty-two hotels that agreed to participate, twenty-nine returned completed questionnaires as instructed. The twenty-nine hotels were from twelve major Chinese cities; eleven of them were CH while the other eighteen were IH. The higher number of IH was due to the participation of an international hotel group that provided eight properties under five different brands. This group uses a multi-brand strategy where the different brands have no clear association with each other. All operator questionnaires returned from IH were in English, whereas all except one of the operator questionnaires returned from CH were in Chinese. The chosen language could be an indication of respondents' culture affiliation as many acculturation measurements (e.g., Suinn, Ahuna, & Khoo, 1992, Lerman, Maldonado, & Luna, 2009) include language choices as a main indicator. Thus, results showed a clear phenomenon that IH are mainly managed by non-Chinese and CH are mainly managed by Chinese. This was supported by Sun's (2011) observation that the majority of IH still assign top management positions in Asia to expatriates.

Table 2 shows the customer sample distribution. While the total numbers of domestic (n = 656) and foreign (n = 690) travellers are similar, Chinese hotels collected more questionnaires from Chinese travellers and foreign hotel brands collected more questionnaires from foreign guests. Feedback from operators indicated that the responses reflect the guest composition of their respective hotels. The majority of

Table 2: Study sample

Brand affiliation	Domestic Chinese traveller	Inbound foreign traveller	Total sample
Domestic brands: 11	318	254	572
Foreign brands: 18	338	436	774
Total sample: 29	656	690	1 346

respondents were male (63.4%), between 26 and 45 years old (68.5%), and well educated (42.2% with graduate degrees). Moreover, 72.0% were travelling on business for the current trip. The majority (72.3%) had stayed with the brand before and 56.3% had stayed in this particular property before.

Operators vs. guests

To compare differences between operators and guests, the 18 common items from the two sets of questionnaires were used. Due to the small sample size of the operator survey, a non-parametric, Kruskal-Wallis test was used to identify differences in perceptions among the operators and two groups of hotel guests (i.e., foreign and Chinese guests). For questionnaires filled out by operators of IH and guests who stayed at IH, out of the eighteen items assessing the various brand-related concepts, fourteen showed significant differences among the groups (Table 3) with 7 highly significant ($p < 0.01$). For questionnaires completed by operators of CH and guests who stayed at CH, only two of the eighteen items showed significant differences at the 0.05 level among the groups (Table 4).

For IH, operators rated all brand-related items more positively than foreign and Chinese guests. In other words, the operators were very positive about their guests' satisfaction, hotel choice intention, quality perception, brand awareness, trust in management, and product reliability. Operators also made the highest estimate – 10% higher than foreign guests and 114% higher than domestic guests – in terms of the maximum room rate that guests would be willing to pay the next time for a room at their hotel.

For CH, operators' and guests' perceptions were similar for almost all items. Operators' views were similar to those of the guests in terms of their satisfaction, hotel choice intention, quality perception, brand awareness, trust in management, and product reliability. For items without significant differences, many of the operators' mean ratings were actually slightly lower than those of the guests, showing that CH managers had been quite conservative in estimating their brand performance and guests' perceptions. Both foreign and Chinese guests rated the hotels' quality higher than the operators did. In terms of price, foreign guests staying in CH reported the highest willingness to pay for a room at the hotel. It is interesting that guests were willing to pay more than the operators' estimate of the guests' willingness to pay, with foreign guests willing to pay 42% more and Chinese guests willing to pay 8% more.

Domestic vs. international brands and guests

The model structure developed by Hsu, Oh, and Assaf (2012) was adopted in this study to investigate differences between domestic and international brands and guests. The means and standard deviations of the brand-related constructs (average of the measurements under each construct) for CH and IH are provided in Table 5, along with *t*-test results. The two groups of hotels only showed significant differences in two constructs: brand choice intention and brand loyalty. In both cases, domestic brands received higher ratings by their guests than did international brands. However, considering

Table 3: Assessment of brand performance for internationally branded hotels

Item: Operator survey (Guest survey)	Operator (n = 18)	Foreign guests (n = 436)	Chinese guests (n = 338)	Chi-square
My guests are (I am) satisfied with my (XX) hotel.	6.28	5.84	5.55	22.544***
My guests (I) will recommend my (XX) hotel to others travelling to this city.	6.00	5.87	5.44	26.704***
Even if another hotel offers the same features as mine (XX), travellers (I) would prefer to stay at my (XX) hotel.	5.89	5.25	5.13	6.424*
Travellers always consider my (XX) hotel a superior choice to other rival hotels.	5.89	4.85	4.99	15.052**
My (XX) hotel is travellers' (my) favourite brand of all competing hotel brands.	5.50	4.73	4.85	7.232*
My (XX) hotel offers an excellent guest experience.	6.00	5.71	5.30	8.688*
My (XX) hotel is regarded as a leader in quality.	6.06	5.27	5.21	26.298***
Travellers (I) know what my (XX) hotel looks like.	5.67	5.37	5.28	n.s.
Travellers (I can) easily recognise my (XX) hotel among other competing hotels.	5.78	5.14	5.30	n.s.
Travellers (I) trust my (the XX) hotel's management.	6.39	5.59	5.40	17.035***
My (XX) hotel implements good management practices other hotels can learn.	6.11	5.39	5.21	11.799**
My guests (I) feel safe and secure when staying at my (XX) hotel.	6.72	5.93	5.48	52.855***
Travellers (I) trust my (XX) employees to have high cultural awareness to help all guests feel comfortable.	6.17	6.71	5.38	21.639***
Travellers (I) trust my (XX) hotel's ability to properly serve guests from different cultures.	6.17	5.64	5.39	16.996***
My (XX) hotel is prepared to serve all guests who speak different languages.	5.89	5.44	5.26	7.450*
Staying at my (XX) hotel is expensive.	3.83	4.51	4.38	n.s.
My (This) hotel is economical.	3.89	3.89	4.05	n.s.
What do you think is the **maximum amount** your typical guests (you) would be willing to pay next time for a room at your (this) hotel before they (you) start evaluating alternative hotels? RMB	$1 422	$1 293	$666	8.552*

Note: 7 = Strongly agree, 1 = Strongly disagree; * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$; Chi-square values based on mean ranks of three groups.

the large sample sizes of both groups and the significance level at 0.5, the statistically significant differences may not be practically significant. That is, the performances of domestic and international brands are in reality very similar.

As first-time and repeat brand users often have different perceptions of the operations' performance, *t*-tests were conducted using guest status (i.e., first-time vs. repeat) as the grouping variable and brand equity components and choice intention as the dependent variable. Results showed significant differences for all variables. To further test if the findings hold for both domestic and foreign guests, separate *t*-tests were conducted using the same grouping and dependent variables. Table 6 shows the *t*-test results. Repeat brand users, both domestic and international, rated all brand performance measurements significantly higher than first-time users.

To test perception differences among foreign and domestic travellers who stayed in IH and CH, we carried out a MANOVA. Scheffe's tests were used as the post hoc procedure to further investigate group mean differences. The results showed significant differences among the four groups of respondents in three of the seven constructs. Table 7 presents the statistical results of MANOVA and the follow-up Scheffe's tests. Figure 2 illustrates the differences graphically. The three constructs that showed significant differences are brand loyalty, management trust, and brand reliability. The main difference for brand loyalty is between domestic guests staying in IH and foreign guests staying in CH. Foreign guests showed a stronger intention of choosing the same domestic brand in the future.

With regard to management trust and brand reliability, foreign guests staying in IH had the highest ratings compared

Table 4: Assessment of brand performance for domestically branded hotels

Item (Operator survey / Guest survey)	Operator (n = 11)	Foreign guests (n = 318)	Chinese guests (n = 254)	Chi-square
My guests are (I am) satisfied with my (XX) hotel.	5.45	5.44	5.47	n.s.
My guests (I) will recommend my (XX) hotel to others travelling to this city.	5.27	5.58	5.45	n.s.
Even if another hotel offers the same features as mine (XX), travellers (I) would prefer to stay at my (XX) hotel.	4.55	5.21	5.23	n.s.
Travellers always consider my (XX) hotel a superior choice to other rival hotels.	4.91	5.10	5.06	n.s.
My (XX) hotel is travellers' (my) favourite brand of all competing hotel brands.	4.64	4.97	4.96	n.s.
My (XX) hotel offers an excellent guest experience.	4.64	5.54	5.32	n.s.
My (XX) hotel is regarded as a leader in quality.	4.82	5.25	5.21	7.691*
Travellers (I) know what my (XX) hotel looks like.	5.09	5.02	5.14	n.s.
Travellers (I can) easily recognise my (XX) hotel among other competing hotels.	5.45	4.97	5.21	n.s.
Travellers (I) trust my (the XX) hotel's management.	5.27	5.39	5.32	n.s.
My (XX) hotel implements good management practices other hotels can learn.	5.55	5.29	5.21	n.s.
My guests (I) feel safe and secure when staying at my (XX) hotel.	5.91	5.64	5.50	n.s.
Travellers (I) trust my (XX) employees to have high cultural awareness to help all guests feel comfortable.	5.00	5.52	5.3	n.s.
Travellers (I) trust my (XX) hotel's ability to properly serve guests from different cultures.	5.27	5.41	5.33	n.s.
My (XX) hotel is prepared to serve all guests who speak different languages.	4.73	5.33	5.13	n.s.
Staying at my (XX) hotel is expensive.	3.45	4.40	4.07	n.s.
My (This) hotel is economical.	5.64	4.63	4.68	n.s.
What do you think is the **maximum amount** your typical guests (you) would be willing to pay next time for a room at your (this) hotel before they (you) start evaluating alternative hotels? RMB	$812	$1 156	$875	9.532**

Note: 7 = Strongly agree, 1 = Strongly disagree; * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$; Chi-square values based on mean rank of three groups

Table 5: Relative performance between domestic and international brands

	Domestic brand (n = 572)		International brand (n = 774)		t-value
	Mean	SD	Mean	SD	
Brand choice intention	5.06	1.15	4.89	1.19	–2.56*
Brand loyalty	5.09	1.18	4.92	1.26	–2.51*
Brand quality	5.29	1.02	5.34	1.11	0.86
Brand awareness	5.05	1.24	5.11	1.20	0.64
Brand image	5.08	1.09	5.04	1.09	–0.66
Management trust	5.32	1.07	5.41	1.08	1.59
Brand reliability	5.32	1.04	5.37	1.07	0.85

*$p < 0.05$; Scale: 7 = Strongly agree, 1 = Strongly disagree

to Chinese guests, regardless of where they stayed. Domestic travellers perceived both IH and CH as deserving of similar levels of trust in management, whereas foreign travellers rated IH much higher on this measurement. While foreign travellers also rated IHs' reliability higher than CHs', domestic travellers rated the opposite; that is, they perceived CH as more reliable than IH. A look back at the transcripts from the focus group with foreign travellers revealed participants' comments that it is especially important for them to be able to trust the hotel management to solve problems for them and to receive reliable service in an unfamiliar environment. Because they are more familiar with international brands, they tend to trust IH management's ability and evaluate IH's reliability favourably.

When looking at all ratings, another interesting observation emerged; namely, Chinese respondents consistently rated all items lower than foreign respondents. This could be a result of Chinese culture's modesty and conservative orientation, which caused respondents to shy away from the extremely high or low ratings. As a result, positive evaluation appears to be less positive and negative evaluation appears to be less negative. Matilla (2000) reported a similar phenomenon that Asian travellers gave significantly lower ratings to the service provider in both the hotel and finding settings. One can also argue that Chinese

Table 6: Relative performance between first-time and repeat guests

	Domestic guests (n = 665)					Foreign guests (n = 695)				
	First-time		Repeat		t-value	First-time		Repeat		t-value
	Mean	SD	Mean	SD		Mean	SD	Mean	SD	
Brand choice intention	4.57	1.22	5.14	1.11	5.60***	4.71	1.13	5.10	1.16	4.04***
Brand loyalty	4.65	1.26	5.14	1.18	4.56***	4.82	1.22	5.30	1.16	4.91***
Brand quality	4.97	1.06	5.36	1.01	4.30***	5.19	1.14	5.51	1.02	3.70***
Brand awareness	4.69	1.30	5.42	1.16	6.85***	4.60	1.44	5.38	1.28	6.67***
Brand image	4.74	1.06	5.20	1.02	5.00***	4.74	1.19	5.16	1.06	4.64***
Management trust	4.96	1.07	5.40	1.10	4.46***	5.22	1.01	5.57	1.04	4.01***
Brand reliability	4.75	1.07	5.28	1.09	5.39***	5.08	1.05	5.46	1.07	4.29***

*$p < 0.05$; Scale: 7 = Strongly agree, 1 = Strongly disagree

Table 7: Brand performance perceived by various groups of guests

Brand equity measurement	International brand		Domestic brand		F value	P value
	Foreign guests (n = 436)	Chinese guests (n = 338)	Foreign guests (n = 254)	Chinese guests (n = 318)		
Brand choice intention	4.87	4.92	5.10	5.02	2.563	0.053
Brand loyalty	4.98	4.85[a]	5.18[a]	5.02	3.637	0.012
Brand quality	5.41	5.25	5.33	5.25	1.859	0.135
Brand awareness	5.12	5.11	5.00	5.10	0.543	0.653
Brand image	5.00	5.08	5.09	5.07	0.483	0.694
Management trust	5.52[a,b]	5.26[a]	5.37	5.27[b]	4.888	0.002
Brand reliability	5.52[a,b]	5.19[a]	5.39	5.27[b]	7.338	0.000

Note: Means in the same row followed by the same subscript are significantly different at the $p < 0.05$ level
Scale: 7 = Strongly agree, 1 = Strongly disagree; Wilks' lambda = 0.986, F = 2.775, p = 0.000

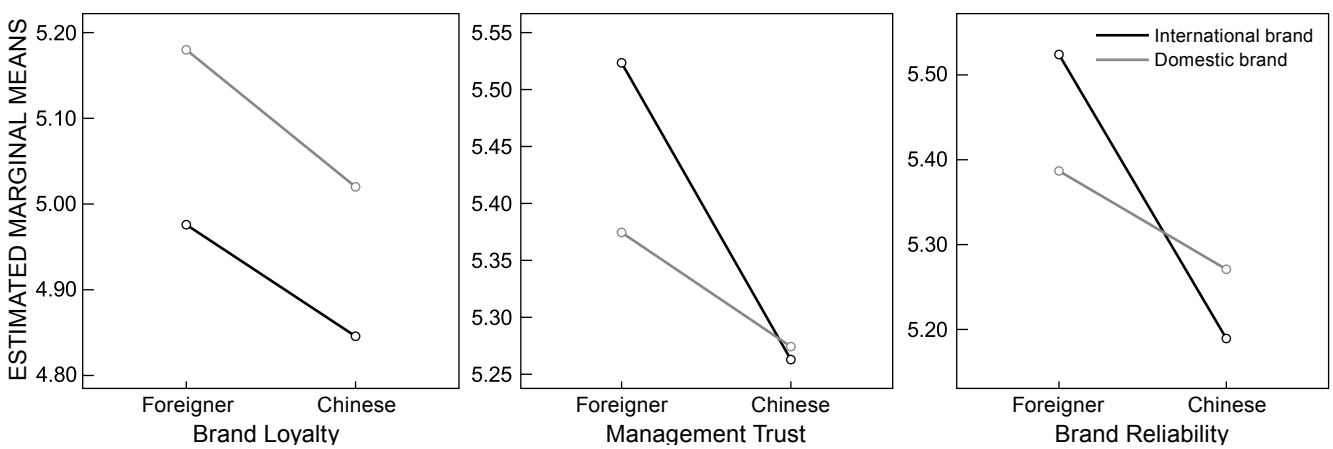

Figure 2: Brand performance differences between domestic and international hotels as rated by foreign and Chinese travellers

consumers are more demanding and have higher expectations; thus, their ratings of the performance were generally lower.

Discussion and conclusions

This study was designed to identify hotel operators' and guests' evaluations of the hotels' brand performance. The uniqueness and contribution of this study lie in its research design, where both operators and guests completed the questionnaires, thus we gained perspectives from both the service providers and customers. Although the sample size of operators was small due to logistical reasons, a direct comparison of these two populations based on the same measurement items has rarely been reported. Guests completed the survey in the hotels prior to their departure, and we customised the questions for guests to evaluate the particular property where they were staying. The results should be more reliable and precise than a generic questionnaire assessing the overall impression of a class of brands or using a fictitious brand. The sample also included both domestic and foreign guests staying in both IH and CH properties. The cross-cultural comparison responded to the call for further investigation of hotel branding from cross-cultural perspectives. Results showed that consumers of different cultural backgrounds do perceive brand projections differently, which echoed claims by most behavioural theories that consumers' perceptions are dependent on their cultural background.

Managers at IH were optimistic in their estimate of guests' perception of their brand and management performance. This may have influenced their pricing strategy of charging higher rates for the well-recognised brands and the expectation of having a positive experience at these brands of hotels. On the other hand, domestic operators' perceptions were more in line with or slightly below those of their guests, which may have also influenced their pricing strategy of charging what they conservatively estimated as the brand value and experience.

Surprisingly, CH received higher guest ratings on brand choice intention and brand loyalty, while receiving similar ratings on all other brand-related measurements. This was contrary to the common assumption that hotel owners are willing to pay for the hefty management fees for the use of IH names due to the brands' greater ability to instill trust in customers and the superior brand equity accumulated. Results of the study provided evidence against the traditional assumption that IH brands have advantage over CH brands in the various components of brand equity, thus they are able to charge higher rates and maintain their occupancy. In fact, guests rated IH and CH quite similarly and this supports one of the propositions raised earlier in this paper. That is, if domestic hotel operators were less confident in their ability to manage properties and provide good lodging experience, they would be hesitant to charge a rate similar to that of IH. On the other hand, IH operators rated their brand performance significantly higher than their customers did. This high self assessment may have resulted in higher room rates, which could contribute to better financial performance.

Due to historical reasons and the late start of the hotel industry in China, CH management professionals were less competent and less experienced. However, due to the rapid growth of the industry, Chinese hotel operators have gained management know-how through various means and many of them are now just as competent as, if not more so than, foreign managers (Sun, 2010). However, they still appear to be more conservative about their perception of guests' evaluation of their management and brand quality. Apart from the influence of a culture where conservatism and modesty are valued, this could be a result of Chinese conventional thinking that experts are from afar, based on a Chinese saying "monks from faraway places know how to chant better". Times have changed though. Guests' evaluation of domestic managers' and hotels' brand-related performance indicated that they are, for the most part, on a par with their foreign counterparts. They should gradually remove their self-inflicted "inferiority complex" by gaining more confidence. Because consumers' perceptions of CH brands are actually favourable, the lower ADR could be a result of poor distribution and/or revenue management. Thus, we encourage domestic hotel operators to review their distribution channel and revenue management strategies in order to enhance their financial performance. The increase of rates takes time and a collective effort. That is, if only a small number of CH increases their rates, they are likely to lose their market share to similar CH properties that offer lower rates. Relevant government offices, such as the tourism bureau, or trade associations could take the lead in educating CH operators and developing sector-wide pricing strategies.

For IH, managers should be aware of the guests' perception and satisfaction. Those who stayed at CH were similarly satisfied with their experience and perceived the brand performance just as well as those who stayed at IH. IH managers may argue that the relatively high ratings of the CH were based on guests' price-value perception; that is, domestic brands charged a much lower rate, thus guests were more generous in assigning high marks. However, IH managers should not take their lead in financial performance for granted. As time moves on, the maturity of the industry and domestic management talent will warrant higher room rates at CH. IH should strive to improve their brand performance so that their competitive advantage can be sustained. Specifically, efforts should be made to enhance guests' perception of brand image and awareness, which were the two lowest rated components impacting brand loyalty and choice intention. Based on the brand performance measurement items, activities that would enhance the prestige of the brand, affiliating the brand with sophisticated guests, and endeavours to make guests feel special are ways to enhance brand image. Communicating with guests and potential guests about the uniqueness of the brand as well as prominently showing the images and feels of the properties and logos could build brand awareness.

The higher ratings of all brand equity components and choice intention among repeat customers could be a result of the fact that they were happy with their prior experience and thus the repeat purchase. Those who had poor experience or did not have a high opinion about the brand would not have become repeat customers. It may also take more than one stay to fully develop their comprehension and appreciation of the various brand equity components. The findings reinforce the importance of retaining customers and building relationship with existing customers.

Of the brand performance components, significant differences were found on brand quality, trust in management, and reliability among the sub-samples. Compared to foreign respondents, Chinese guests rated these components lower for

both IH and CH. Even though culture may partially explain the rating differences, the lower ratings would have implications for marketing and operational strategies targeting the two different populations. For example, both hotel groups need to more expressively communicate with Chinese guests for them to feel that they can trust the management in offering quality services and solving problems when they arise. Foreign guests also rated these two components lower for CH, which presents room for improvement. The focus group interview transcripts further indicated that the English speaking ability of CH employees influences their assessment of the hotels' ability to solve problems for them. Therefore, having foreign language proficient staff would be important for CH to enhance their brand performance. The high brand loyalty among foreign guests toward CH should be particularly noted by operators. Efforts to maintain the loyalty should be a top priority, which will help further expand the business from this market segment.

Results of this study may have some implications for hoteliers in other emerging countries, based on perception differences between domestic and foreign guests as well as on domestic and international hotel brands. Strategies discussed above could serve as a reference for hotel operators in those countries. However, each country has a different hotel development pattern, especially domestic hotel brands, and the dynamics and market positioning among hotels of various country origins could be different. Thus, care should be taken when adopting the strategies suggested based on data collected in China.

The analysis used in this study was descriptive, rather than predictive, in nature. The financial performance differences between IH and their domestic counterparts could be a result of many factors. However, this study only examined hotel operators' and guests' perceptions of various brand-related performance indicators. The small sample size of hotel operators is also a limitation of this study, which prevented the investigation of any differences in perception between managers of different culture background working for the same brand type (i.e. IH or CH). Due to the concentration of non-Chinese managers in IHs and Chinese managers in CHs, to make meaningful comparisons, the total operator sample size would need to be substantial to have sufficient Chinese managers from IHs and non-Chinese managers from CHs. Future research could further investigate both the market environment and operational characteristics in detail to explain the causes of financial performance gaps between these two groups of hotels in China. Other areas that deserve future research attention include the reasons of rating differences between Chinese and foreign respondents and why non-Chinese guests generally reported a higher brand loyalty level regardless of the hotel type. Future analysis could also control the room rate when examining ratings on various brand-related constructs to remove the possible effect of the price-value judgment.

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Looking from a local lens: Inbound tour operators and sustainable tourism in Kenya

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Few empirical studies on sustainable tourism take into account the perspective of developing countries' actors. This is even the case in debates about the need to adapt sustainability's definitions to the context of developing countries. The present study aims at giving a voice to developing countries' actors by describing how inbound tour operators (ITOs) in Kenya conceive sustainable tourism and their role in promoting it. ITOs were reached through the two official Kenyan category associations for tour operators and through Ecotourism Kenya. Both a survey and in-depth interviews were used to gather data. Results suggest that Kenyan ITOs are familiar with the current definition of sustainability as being constituted of an economic, a social and an environmental dimension. Contrary to expectations, respondents weight their responsibility towards the natural environment at least as highly as their social responsibility. In the end, it is the business long-term survival that dictates this choice: respondents are aware that tourists expect to find in Kenya a flourishing natural environment. Kenyan ITOs are on the whole keenly aware of their role in promoting sustainability to tourist, staff and the community. They experience as a major challenge the lack of institutional pressure from the government. Though this is a common complaint of organisations in developing countries, it is interesting in a Kenyan context where the Government has deployed several policy initiatives on sustainable tourism. A major limitation of this study is the limited sample. Only category associations' members were sampled, leaving ITOs that operate in the informal economy unheard.

Keywords: sustainable tourism development, corporate social responsibility, inbound tour operators, Kenya

Introduction

Sustainable tourism is considered a suitable avenue for deprived areas to develop economically and socially, while respecting the natural and cultural heritage (Heymann & Ehmer, 2009; United Nations World Tourism Organization [UNWTO], 2003, 2004). For developing countries, this assumption has been challenged on two grounds. On the one hand it has been observed that sustainability and corporate social responsibility (CSR) are concepts devised in developed countries that need to be adapted to the specific context of developing countries (Blowfield & Fynas, 2005; Prieto-Carrón, Lund-Thomsen, Chan, Muro & Bhushan, 2006; Fox, 2004; Visser, 2008). On the other hand it has been contended that there is insufficient evidence to claim that sustainable tourism leads to a more balanced form of development in these countries.

There is indeed a general lack of empirical research on the nature and extent of CSR in developing countries (Visser, 2008; Vives, 2008). Moreover, researchers tend to focus on high impact industries, such as agriculture or mining, where multi-national corporations are well represented. Other sectors – such as tourism – and the role of small, locally owned businesses are left virtually unexplored (Visser, 2008).

This paper aims to shed some light on the discussion about how applicable the concept of sustainability is to developing countries by bringing to the debate the perspective of actors working for locally owned businesses in tourism. Its main objective is to describe how inbound tour operators (ITOs) in Kenya conceive sustainable tourism and what their role is in promoting it.

The paper has the following structure. The literature review identifies the main issues for the empirical study by discussing sustainable development and CSR in general and in developing countries in particular; the role of tour operators in sustainable tourism and the situation in Kenya. The research method section illustrates the choice for a mixed methodology and discusses issues connected with sampling. Next the results are presented and discussed under subheadings that refer back to the main issues described in the literature review, namely corporate social responsibility and sustainable tourism; the role of ITOs, behaviour and intentions; the drivers for ITOs to engage in sustainable tourism and the challenges they face in doing this. A conclusions and recommendations section closes the paper.

Literature review

This section discusses the literature on sustainability and CSR in developing countries and identifies the main issues for the empirical study: the role of inbound tour operators in the tourism chain, Kenya as a tourism destination, and the role that ITOs are expected to play in Kenyan sustainable tourism policy.

Sustainability, CSR and developing countries

Sustainability and CSR voice the need to care for social

development and environmental protection while seeking economic growth and profit (Cavagnaro & Curiel, 2012). Social development implies a more equitable distribution of wealth among countries and within countries. On this basis it has been argued that economically and socially deprived areas – including so called 'developing countries' from the South – should embrace sustainability and CSR as guiding principles for their development (Heymann & Ehmer, 2009). This view has been opposed on the ground that sustainability and CSR are concepts devised in developed countries (the so-called North) and so it should not be expected that these will fit the needs of developing countries' actors (Blowfield & Fynas, 2005; Prieto-Carrón, Lund-Thomsen, Chan, Muro & Bhushan, 2006; Fox, 2004; Visser, 2008). Several developing countries suffer from a lack of legislation, weak enforcement of existing laws, major market failures, and excruciating social issues. Against this backdrop it has been proposed that, alongside profitability, businesses operating in developing countries should give precedence to philanthropic activities above other considerations of social responsibility (Visser, 2008).

In a similar vein, it has been observed that social development and environmental protection are often not complementary but antagonistic dimensions. Consider, for example, the design of natural parks and animal reserves in developing countries. In several countries this development took place in colonial times without considering the needs and rights of the original inhabitants. Today the conflict between human and animal rights is still deeply felt by many people in developing countries, especially in Africa (Manyara & Jones, 2007). Their understandable doubts about the real merits of environmental protection challenge the basic assumption of sustainable development, i.e. that socioeconomic development and natural protection can be reconciled both in developing and developed countries (Butcher, 2011).

Summarising, authors such as Visser (2008) and Butcher (2011) state that in developing countries the socio-economic dimension of sustainability should take precedence on its environmental dimension so that poverty is eradicated first. However, sustainable development and CSR in its classic definition (WCED, 1987; II Earth Summit, 1997; Elkington, 1998) require value creation on its economic, social and environmental dimension simultaneously and globally. Therefore, if some countries focus only or primarily on one dimension, then sustainability cannot be achieved, either in those countries or globally.

Interestingly, though, doubts about the universal applicability of sustainability have mainly been raised by academics from the North and are scarcely supported by empirical research. Whether actors from the South share these doubts is therefore largely unknown. To further the debate, it is therefore essential to incorporate the Southern perspective in it by engaging actors from specific developing countries and industries (Blowfield & Fynas, 2005; Prieto-Carrón et al., 2006; Fox, 2004; Visser, 2008). The major question to be answered in this context is how local businesses, especially SMEs, view the nature and extent of sustainable development and CSR (Blowfield & Finas, 2005; Visser, 2008). This is then the first issue of investigation that will be considered in the present study.

Inbound tour operators

The general tendency in research on CSR in developing countries is to focus on "high profile incidents or branded companies and a few select countries" (Visser, 2008, p. 493). The focus on branded companies and Multi National Corporations (MNCs) is understandable but would not serve the scope of this research. It is understandable because, MNC headquarters are usually in a developed country, where there might be an interest for their international operations. This is particularly the case when an MNC is involved in high impact and visible industries such as mining (e.g. Kapelus, 2002), and petrochemicals (e.g. Acutt, Medina-Ross & O'Riordan, 2004).

Focussing on MNCs, though, would not serve the scope of this research, i.e. to integrate a Southern perspective in the debate on the applicability of sustainability and CSR as usually understood for developing countries. MNC headquarters are usually located in a developed country and it may be safely supposed that their understanding of sustainability and CSR reflect the perspective of these countries. Accordingly this research focuses on local SMEs, operating in those sectors where MNC are less represented, such as tourism (Blowfiedl & Finas, 2005; Visser, 2008).

In the tourism value chain, tour operators provide the essential link between supply and demand. They liaise with several organisations to design packages and sell them to tourists at a single price (Khairat & Maher, 2012; Tepelus, 2005). As such, they are key to achieving sustainable tourism in many ways. They can, for example, direct tourist flows, influence the attitude of tourism stakeholders, including their guests, towards sustainability and shape local communities (Sigala, 2008).

The essential role of tour operators in promoting sustainable tourism is widely recognised. For example, one of the major initiatives aimed at improving the sustainability of the tourism sector, the Tour Operators Initiative (TOI), has specifically been designed for tour operators. TOI was developed by the United Nations Environmental Programme (UNEP), the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the UNWTO already in 2000 (Holden, 2008; Font & Cochrane, 2005). This initiative has a worldwide scope and encourages tour operators to integrate environmental, cultural and social considerations in the design of tourism packages and in their own operations (Font & Cochrane, 2005; Khairat & Maher, 2012).

All these factors have led to some research on sustainable tour operating practices. The studies are mainly focused on outbound tour operators, though (e.g. Khairat & Maher, 2012). Outbound tour operators (OTOs) tend to be based in tourist source countries, have extended knowledge of the market, are usually an MNC serving a wide range of destinations, and have high bargaining power. Inbound tour operators (ITOs), on the contrary, are based at the destination, have expert knowledge of the destination and its attractions, are mostly locally owned SMEs, manage an extended local network, and are characterised by low bargaining power (Akama & Kieti, 2007; Budeanu, 2005; Mayaka & King, 2002). Being imbedded in the destination and being responsible for putting together local tourism packages, ITOs are key to promoting and achieving sustainable tourism at the source. Nevertheless, research on ITOs in general and in developing countries in particular is almost non-existent. The present study aims to close this gap by focusing on ITOs in Kenya. The first issue for investigation identified above, i.e. how

local businesses, especially SMEs, view the nature and extent of sustainable development and CSR, will therefore be explored from the perspective of ITOs in Kenya.

Kenya as a tourism destination

Kenya offers an interesting context for studying sustainable tourism because it is a popular African destination renowned for its diverse natural and cultural attractions (Akama, 2000). Moreover, tourism is a key economic activity in Kenya contributing 10% to GDP and providing over 500 000 jobs across the formal and informal sectors (GoK-MoT, 2006). In 2007, for example, Kenya attracted 1.8 million international tourists and generated 654 million euros in revenue (Mayaka & Prasad, 2012). Finally, tourism is a key priority in the Kenyan government's long-term plans and policies: it is one of the pillars of *Vision 2030* which aims to make Kenya a newly industrialising, middle income country providing high quality of life for all citizens by the year 2030 (GoK, 2007, p. 10).

Looking briefly at the development of tourism as an industry in Kenya, it is clear that since the 1980s Kenya has been known as a mass tourism destination characterised by a high volume of tourists and low economic value as a result of all-inclusive packages sold by OTOs in Kenya's key source markets. Increased insecurity due to the Gulf War and civil unrest led to a downward spiral of Kenya's tourism in the 1990s. Recovery has been slow and was only briefly achieved in the years between 2004 and 2008. Riots following the 2008 political elections resulted in plummeting tourist arrivals (Mayaka & Prasad, 2012; UN, 2012).

In its efforts to reverse this negative trend, the Kenyan government developed a comprehensive national tourism policy in 2008 founded on the principles of sustainable tourism (GoK-MoT, 2008). In 1992 Kenya had already adopted Local Agenda 21 and in 1996 it established a dedicated association for the promotion of responsible and sustainable tourism, Ecotourism Kenya. During the past few years, Ecotourism Kenya has developed several initiatives, including the first ever Eco-rating scheme in Africa, the annual Eco-warrior Awards and the annual Ecotourism Conferences where tourism stakeholders discuss progress, challenges and future plans. In 2003, the Global Code on Child Sex Exploitation was also adopted.

The choice by the Kenyan government for sustainable tourism is consistent with research showing that sustainability and CSR "may also be seen as an enabler for companies in developing countries trying to access markets in the developed world" (Visser, 2008, p. 485). Nevertheless, it should be noted that the most recent policy document *Vision 2030* by the Kenyan Government is focused on growth, and sees eco-tourism and cultural tourism only as niche markets (GoK, 2012).

The role of ITOs in Kenya

The Kenyan Government expects tourism organisations to play a pivotal role in implementing the sustainable tourism policy. Activities mentioned are: involving local communities through joint partnerships, developing and promoting a kind of tourism that is socially, culturally and environmentally acceptable, and adopting, where appropriate, an eco-rating system (GoK-MoT, 2006). This expectation leads to a second issue for investigation: whether ITOs in Kenya recognise that they have a role in implementing and promoting sustainable tourism. Linking back to the discussion above on the general role of tour operators in promoting sustainable tourism, this also means understanding which type of activities they deploy towards their employees, guests and the surrounding community.

Kenya's tourism industry presents few national players and a wide array of small, regional, seasonal businesses offering products and services of varying quality. It can therefore be characterised as highly fragmented. In an effort to regulate the tourism industry, in 2009 the Kenyan government passed policies that make it mandatory for organisations to be members of trade associations. The role of trade associations in the implementation of sustainable tourism includes encouraging the adoption and implementation of mandatory codes of conduct for members, and other forms of self-regulation. While these initiatives are noteworthy, they are still mainly directed towards some specific sectors within the industry (such as accommodation and local communities) while the tour operation sector, despite its vital role, is barely mentioned. Like other destinations in developing countries, Kenya is highly dependent on tour operators and so there is a clear need to involve them more actively in the sustainability agenda (Akama, 2000). This leads to a third issue for this research: whether ITOs in Kenya feel supported by the government and by category associations when engaging in sustainability.

It has been argued that there are still many social and environmental challenges that are left unmet and impede a sustainable development of the tourism industry in Kenya (Mayaka & Prasad, 2012; UN, 2012). It has, for example, been observed that further development of CSR in Kenya is impeded by a lack of external pressure. Both the government and the industry associations lack the institutional capacity to exert pressure on companies, while there is almost no demand for sustainable products or services by local customers. Pressure from international partners in the chain is also low, especially for SMEs (Kivuitu, Yambayamba & Fox, 2005). In the absence of these drivers, other factors could support the implementation of CSR, such as cultural motives and the need to address governance gaps and to respond to a political, social or economic crisis (WBCSD, 2000; Visser, 2008; Vives, 2008). Whether or not this also holds true for ITOs in Kenya is the fourth and last issue for investigation in this study.

In summary, the main issues for investigation are ITOs' understanding of the nature and extent of sustainable development and CSR; the role they see for themselves in implementing and promoting sustainable tourism, including the activities they deploy; which drivers led them to engage in sustainable tourism; and which challenges impede them from doing so. The information gathered will be used to shed some light on the debate about the need to contextualise sustainability for developing countries.

Research methods

The aim of the present study is to shed some light on the debate about the applicability to developing countries of the classic definition of sustainability as value creation on environmental, social and economic dimensions. Its main objective is to inform this debate with the perspective of local actors from a less well-researched sector, in this case tourism and Kenyan inbound tour operators (ITOs).

Through the literature review the following issues for investigation have been identified:

- ITOs' understanding of the nature and extent of sustainable development and CSR
- How ITOs conceive their role in implementing and promoting sustainable tourism in Kenya, including the activities they deploy
- Which drivers do they think led them to engage in sustainable tourism, and
- Which challenges impede them from doing so.

The issues identified revolve around the meaning and significance that local actors attach to their own behaviour in relation to sustainable tourism (Scheyvens & Storey, 2003; Easterby-Smith, Thorpe & Lowe, 2006). The preferred instrument to uncover meanings is face-to-face, in-depth, semi-structured interviews. In-depth interviews allow the respondents to explain their views and thus yield richer results than a questionnaire-based interview, which tends to be rigid and to provide shallow information (Bryman, 2012; Veal, 1997).

While qualitative techniques are versatile, they lack the benefits of quantitative techniques such as the ability to reach a broad sample in a short time to acquire a more precise picture of the population (Mayaka & King, 2002). To achieve the main objective of this research, it is indeed important to reach a larger number of respondents than would be possible with in-depth interviews. Therefore, to harness the potential of both techniques in the context of this study, a mixed-method approach was chosen where a questionnaire and face-to-face, in-depth, semi-structured interviews were used as instruments. These two instruments were integrated using a circular set-up where similar questions were proposed to the survey respondents and the interviewees. This may represent an innovative approach to the study of sustainable tourism in developing countries.

In Kenya, there are approximately 2 238 ITOs, ranging from microenterprises (fewer than 10 employees) to MNCs (> 250 employees), (interview with KATO, April 2010). The exact number, size and ownership structure of Kenyan ITOs, though, is unclear. This point is important, because the extent to which smaller enterprises engage in sustainable tourism is influenced by their size, ownership and financial capability, alongside awareness and knowledge (Lepoutre & Heene, 2006; Wijk & Persoon, 2006; Tepelus, 2005).

It is estimated that the majority of Kenyan ITOs operate only seasonally, are short-lived or might be considered part of the informal economy (interview with KATO, April 2010). Seasonally operating ITOs do not tend to join one of the two existing tour operator associations in Kenya (KATO and KALTO). Consequently, these two associations with their 318 members represent only 13.4% of the estimated number of tour operators in Kenya. Nevertheless, these members fit the general definition of inbound tour operators given in the literature review and are considered by KATO and KALTO to be representative of all tour operators in Kenya (interview with KATO, April 2010). Finally, basic data needed for research purposes – such as contact details – are known only for ITOs that are members of a category association. The population for the questionnaire is thus considered to be the 318 members of the two Kenyan tour operators' associations.

The questionnaire explores the four issues that emerged from the literature review and gathers data on the size and ownership structure of the ITOs as well. Open and closed (5 Likert-type scale) questions were designed based on the literature described in the literature review section. Examples of questions are given in the results section with reference to the literature on which they are based (the questionnaire will be sent to interested researchers on request by the corresponding author).

After a pilot that confirmed the general soundness of the instrument, the questionnaire was sent by post or e-mail to senior managers of all 318 members of the two existing tour operator associations in Kenya. The response rate for the questionnaire was 19.8% (n = 63). This figure could seem quite low but considering the context of the study and its explorative character can be deemed acceptable.

Tables 1 and 2 show the size and ownership structure of the ITOs that responded to the questionnaire.

Four fifths of the sampled ITOs (80.3%) consist of microenterprises (1–9 employees) of which 50.8% count 3–5 employees and 14.3% only one employee. One fifth (19.7%) is represented by small and medium enterprises (SMEs) and a few larger companies. The largest ITO surveyed has 225 permanent employees.

The vast majority of the sampled ITOs (87.3%) are locally owned, while a minority (12.7%) are owned in partnership by a local and a foreign company. None of the sampled ITOs surveyed are fully foreign owned. In terms of their size and ownership structure, the 63 ITOs do not diverge from the population of 318 enterprises that consist of 80% micro and 89% locally owned enterprises (data provided by KATO, April 2012). These figures serve to validate the sample with respect to size and ownership.

It can be argued that the figure on ownership shows that MNCs do not control the ITO sector in Kenya. This supports the choice of ITOs as the focus of a study, like the present one, that aims at enriching the debate on the need to contextualise sustainability with the voice of developing countries' actors. It should be also noted that the homogeneity of the sample (and the population) does not support a statistical analysis on the influence of ownership and size on the issues explored.

The small number of respondents, though, requires reflection on self-selection of the sample. The question may be asked whether only ITOs that are interested in sustainability have answered the questionnaire. Though this cannot be excluded, the variety of answers to the question concerning a definition

Table 1: Number of permanent employees

	Number	Percentage	Valid %
Fewer than 10 employees	49	77.8	80.3
Between 10 and 250 employees	12	19.0	19.7
Total (no missing value)	61	96.8	100.0
Missing	2	3.2	
Total	63	100.0	

Table 2: Ownership

	Number	Percentage	Valid %
Local	55	87.3	87.3
Joint partnership between a Kenyan and a foreigner	8	12.7	12.7
Total	63	100.0	

of sustainability (as it will be shown in the result section) is such that it may be safely stated that the respondents are surely not all equally informed about and interested in sustainability.

Once the questionnaire data were gathered and analysed, face-to-face, in-depth interviews were set up with 10 tour operators (16% of the survey's sample population), who were not only members of one of the two associations but also of Ecotourism Kenya. The aim of the interviews was to probe more deeply into the four issues for investigation by listening to ITOs already engaged in and thus more experienced in sustainable tourism. Using systematic random sampling, 10 companies were selected from the Ecotourism Kenya tour operator database. The companies selected were therefore compared to the sample population to ensure that they were representative of it in terms of size and income, as both are considered determining factors for joining sustainable practices (Lepoutre & Heene, 2006; Wijk & Persoon, 2006; Tepelus, 2005). No adjustments were required.

The interviews lasted on average one hour, were tape-recorded, transcribed, coded and then analysed according to the various themes enshrined in the research's aim.

All participants were informed about the purpose of the research, that their participation was voluntary and that they could withdraw from the research at any point. They were assured that utmost confidentiality would be maintained and anonymity guaranteed. Therefore no information was requested that might help to identify respondents such as their names, contact details, and name of the organisation they work for.

Results and discussion

Results are presented and discussed in subsections addressing the issues of investigations identified in the literature review. The section on CSR and sustainable tourism explores ITOs' understanding of the nature and extent of sustainable development and CSR; the section on role, behaviour and intentions focuses on how ITOs conceive their role in implementing and promoting sustainable tourism in Kenya, including the activities they deploy; the last section on challenges and motivations discuss the drivers that led ITOs to engage in sustainable tourism; and the challenges that impede them from doing so.

Corporate social responsibility and sustainable tourism

As observed in the literature review, it has been doubted whether developing countries' actors could and should aim at creating value simultaneously on the economic, social and environmental dimension of sustainability instead of concentrating on its socio-economic dimension alone. To further this debate it is vital to gain a better understanding of how locally owned and operated businesses in developing countries understand CSR in general and sustainable tourism in particular. Both in the survey and in the in-depth interviews this theme was addressed.

An open question asked survey respondents to describe their understanding of CSR. Almost 40% of respondents (38.1%) described CSR with reference to its environmental, social and economic dimensions in line with Elkington's Triple Bottom Line definition (1998). Almost one quarter of respondents (23.8%) refer to two dimensions and one fifth (20.6%) to only one dimension. Interestingly, in the last two cases it is the environmental dimension that is mostly referred to. The remaining 17.5% of respondents chooses a definition closer to that of the World Commission on Environment and Development (WCED 1987) with a broad reference to businesses' responsibility towards society and the future.

Similarly, sustainable tourism is described either with reference to its economic, social and environmental dimensions (31.1% of respondents) or with reference to one (11.5%) or two (23%) of these dimensions, with an insistence on the environmental one. Slightly more than 10% of respondents chose a definition more similar to the WCED's (1987) by referring to benefits for the stakeholders and future generations. No respondent mentioned philanthropy.

The insistence on the environmental dimension is remarkable, considering the pressing social issues present in many developing countries, including Kenya, and the expectation that companies would see it as their social responsibility to first and foremost address these social issues (Manyara & Jones, 2007; Visser, 2008; Vives, 2008). A suggestion for interpreting the environmental focus of the survey respondents comes from the in-depth interviews: Kenyan ITOs recognise their dependence on a sound natural environment for the survival of their business. Two quotes are exemplary here:

> *They [ITOs] are involved directly with tourists and destinations hence they should contribute in maintaining the environment* (interviewee no. 2).

> *We [ITOs] are the biggest beneficiaries of sustaining our natural history because that is what we sell* (interviewee no. 9).

Looking at the answers to questions about the definition of CSR and sustainable tourism, it may be concluded that, contrary to some suggestions (Visser, 2008) at least a large minority of ITOs in Kenya are comfortable with the classic definition of CSR and sustainable tourism as value creation on an economic, environmental and social dimension. This conclusion is reinforced by the fact that most respondents recognise the dependence of the economic dimension on the environmental dimension in the case of tourism and that none of them refers to philanthropy as their main CSR responsibility (Visser, 2008).

Role, behaviour and intentions

This section focuses on how ITOs conceive their role in implementing and promoting sustainable tourism in Kenya.

In the survey a question is posed concerning the types of activities implemented in the past twelve months (Table 3), and a second question is posed about the activities that the organisation intends to perform in the ensuing year (Table 4). The first question aims to discern ITOs' understanding of their role, and the breadth of their engagement. The second one explores the horizon of ITOs' engagement with sustainability. The activities listed were derived from literature on sustainable tourism best practices (e.g. Watkin, 2003; Tepelus, 2005; Wijk & Persoon, 2006). Indirectly, thus, the answers to these questions address the issue as to whether sustainable activities that are considered by researchers as proper to ITOs are recognised as such by local actors in developing countries.

Table 3 presents the activities that Kenyan ITOs have deployed in the twelve months before the survey. Some

interesting conclusions can be drawn from the table. To start with, all respondents but one are able to relate to the listed activities. In other words, these are recognised by Kenyan ITOs as fitting to their role. Moreover, a vast majority of respondents ticked activities concerned with the community (contribute to community projects: 74.2% of respondents) and with people's welfare (enhance employee welfare: 69.4%). All these activities are connected with the social or people dimension of sustainability. Environmental conservation comes directly afterwards (62.9%). It is interesting to comment on this outcome with reference to the definition of CSR and sustainable tourism discussed above. The definitions suggested a slight environmental bias that was interpreted with reference of the dependence of ITOs business on a healthy natural environment. This bias, though, is qualified here: in listing sustainable activities Kenyan ITOs refer firstly to the social dimension of sustainability.

Table 3: Activities implemented in the last 12 months

	N	Response percentage	Percentage of cases
Contribute to community projects	46	14.6	74.2
Enhance employee welfare	43	13.6	69.4
Contribute to environmental conservation	39	12.3	62.9
Promote facilities and attractions that practice sustainable tourism	39	12.3	62.9
Sensitise tourists and staff on sustainable practices	38	12.0	61.3
Work with local destination managers to promote sustainable tourism practices	31	9.8	50.0
Use more fuel-efficient vehicles	25	7.9	40.3
Reduce leakage of profits to overseas tour operators	22	7.0	35.5
Implement a sustainability policy	21	6.6	33.
Sign up against child sex tourism	11	3.5	17.7
None of the above	1	0.3	1.6
Total	316	100.0	509.7

Table 4: Activities that the company intends to do in next 12 months

	N	Response percentage	Percentage of cases
Contribute to community projects	38	11.7	64.4
Enhance employee welfare	38	11.7	64.4
Contribute to environmental conservation	36	11.0	61.0
Sign up against child sex tourism	35	10.7	59.3
Work with local destination managers to promote sustainable tourism practices.	35	10.7	59.3
Use more fuel-efficient vehicles	32	9.8	54.2
Promote facilities and attractions that practice sustainable tourism	32	9.8	54.2
Implement a sustainability policy	30	9.2	50.8
Sensitise tourists and staff on sustainable practices	30	9.2	50.8
Reduce leakage of profits to overseas tour operators	20	6.1	33.9
Total	326	100.0	552.5

Finally, respondents are conscious of their role as champions of sustainable tourism towards other businesses (62.9% promote facilities and attractions that practice sustainable tourism); towards guests and staff (61.3%) and towards the local businesses (50%). This result confirms the essential role that local SMEs and microenterprises in the tourism industry play in promoting the sustainability agenda (Khairat & Maher, 2012; Sigala, 2008; Tepelus, 2005; WTO, 2002, 2004).

Results from the in-depth interviews corroborate the conclusion that ITOs are conscious of their role and the possibilities that their position in the chain gives them in promoting sustainable tourism. Typical in this respect is the following quote:

> *The same tour operators are the ones who design itineraries, who stay with clients throughout their stay in Kenya, and deal with them directly; and we are the ones to spread the 'gospel' about sustainable tourism. It starts with us as tour operators* (interviewee no. 8).

Interviewees also confirm ITOs' engagement in the activities listed in Table 3 and shed some light on the type of community activities in which they engage. Examples of activities deployed are participating in biogas projects (interviewee no. 1); carbon offset projects (interviewees no. 3 and 4); hiring locally (interviewees no. 1 and 4); designing and selling 'voluntourism' packages (interviewee no. 6) amongst others. Traditional philanthropic activities are also quoted: these are mostly directed towards children's education and assistance (interviewees no. 1, 2, 3, 5, 9 and 10) on one side and healthcare on the other (interviewees no. 9 and 10). Engagement in the community is not or at least not exclusively framed as a philanthropic activity, but as an outcome of the sustainable strategy of the organisation as highlighted in the following quote:

> *We are developing our own structures within the organisation to ensure the operation is sustainable. We are introducing sustainable tourism principles in the whole organisation* (interviewee no. 6).

This reinforces the conclusion already reached in the previous section that ITOs do not primarily consider CSR and sustainable tourism as a philanthropic activity, but as part and parcel of their business's strategy and operations.

Interestingly, in discussing codes such as the Code against Child Sex Tourism, interviewees, though recognising that codes are an adequate first step towards a more sustainable form of tourism, doubt their efficiency either because of free-riding or because of lack of enforcement. This might explain the low importance given to signing for a Code against Child Sex Tourism by survey respondents.

That Kenyan ITOs do not consider their involvement with sustainable tourism as temporary is shown by their answer to the survey question about activities that they intend to develop in the following year (Table 4).

It is interesting to observe that, while the top three items in Table 4 are the same compared to the list of activities already deployed, the rest of the list shows some variance (see also Figure 1 below). The importance given to signing the Code against Child Sex Tourism and developing a sustainable policy

increases sharply. A possible explanation for this outcome could be the renewed efforts by the Kenyan government to promote the Code (interview with KATO, April 2010). In the light of a general lack of pressure from the Kenyan government (see next section) the emphasis placed on implementing sustainability policies should be interpreted with references to testimonies – such as the one from interviewee no. 6 quoted above: the insight is spreading among Kenyan ITOs that sustainability should be deeply imbedded in processes and procedures of the organisation and that it is not a set of separate (philanthropic) activities (Cavagnaro & Curiel, 2012).

In conclusion, Kenyan ITOs show a clear understanding of their role towards implementing sustainable tourism and in general they do not frame it as a philanthropic activity but as an activity that permeates the entire breadth of their operations. They recognise themselves in activities such as the ones listed in Figure 1 that are traditionally connected with sustainable tourism in developed countries as well.

Drivers and challenges

The last issue explored in this study concerns the reasons to engage (or not) with sustainable tourism, or in other words drivers and challenges.

Table 5 presents the answer to the (5 Likert-type) questions about reasons not to engage. These reasons may be considered as challenges in engaging in sustainable tourism. The listed challenges are taken from authors such as Tepelus (2005), Kivuitu, Yambayamba and Fox (2005) and Wijk and Persoon (2006).

First of all it should be noted that many of the challenges encountered by Kenyan ITOs – such as costs; lack of information and skills – are similar to the ones SMEs face in developing countries (Lepoutre & Heene, 2006). These challenges are corroborated by results from the in-depth interviews. The following quote testifies to challenges such as, respectively, high costs; desire for knowledge and lack of skills.

> *Initial costs [of sustainable tourism measure such as training of employees on codes of conducts, authors' note] are high* (interviewee no. 1).

> *You will talk to people and they don't understand, they think you are just playing the good boy. Although most issues on sustainability are common sense, common sense is not that common to everybody. Ignorance, lack of knowledge: these are seen collectively among suppliers, clients, staff, and the communities* (interviewee no. 10).

> *The background of locals e.g. being pastoralists and then becoming accountants in the tourism facility as well as owning and managing lodges is quite a challenge* (interviewee no. 5).

While the above-mentioned challenges are generally observed in SMEs engaging in sustainable tourism, the interviewees refer to two challenges that seem more specific to the context of developing countries: exploitation of communities and human-wildlife conflicts. In this context interviewees stress the need to build trust in the community to win over their first negative reaction towards sustainable

Table 5: Challenges of sustainable tourism

	Strongly agree/agree	Disagree/ strongly disagree	Not sure
Lack of institutionalised efforts engaging tour operators	83.0	11.9	5.1
Lack of information on how tour operators can get involved	78.3	11.7	10.0
Lack of knowledge on how tour operators negatively impact the destination	74.1	22.4	3.4
The costs involved	73.4	18.3	8.3
General lack of interest among tour operators	70.0	16.7	13.3
Lack of skills for implementing sustainable practices	65.0	21.6	13.3
Lack of demand for sustainable tourism products	50.9	33.9	15.3

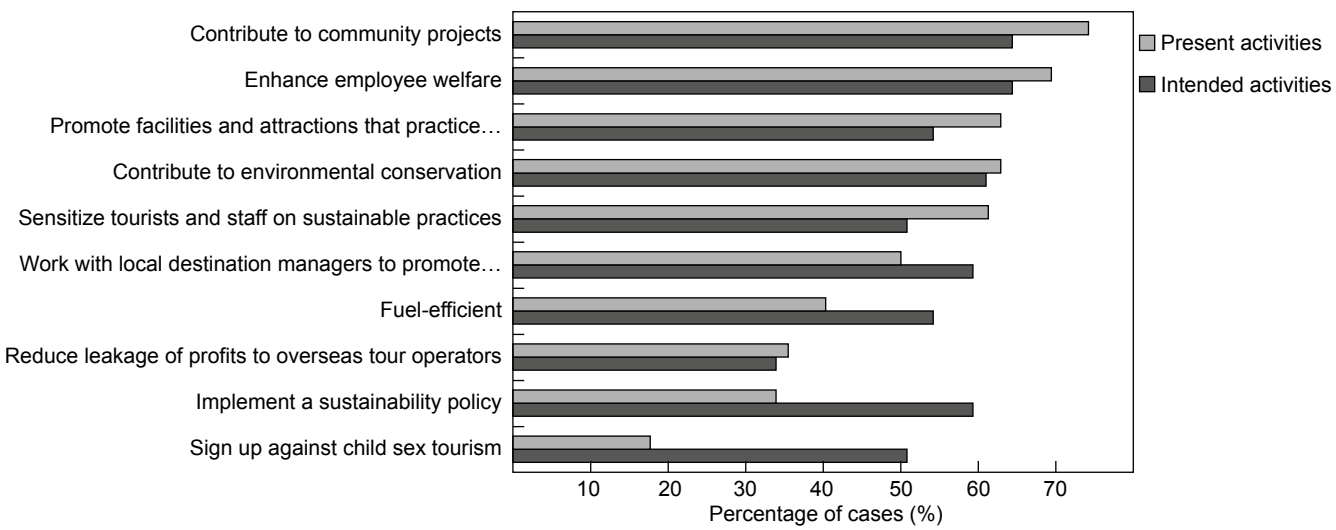

Figure 1: Comparison of deployed and intended activities

tourism and environmental protection (Manyara & Jones, 2007). Interviewee no. 1, for example, observes:

> *Building trust and good relationship with communities is a challenge because before, the communities had been taken advantage of for a long time or they were underpaid. The managing director of [name organisation] lived with the community at the beginning in order to build trust. There are some difficult individuals in the community (sometimes the elite). Human/ wildlife conflicts is also a challenge* (interviewee no. 1).

The lack of efforts by institutions in engaging tour operators in sustainable tourism is a challenge experienced by almost all survey respondents (94.9%). In general terms, this result is not surprising. It has been often observed that governments in developing countries lack the capacity to design, implement and enforce sustainability policies and regulations (Vives, 2008; Mayaka & Prasad, 2012). Yet, it is surprising in the specific Kenyan context, where the government has taken several initiatives towards sustainable tourism and where there is a category association (Ecotourism Kenya) dedicated to its promotion (GoK-MoT, 2008; GoK-MoT, 2006). The novelty of the sustainable tourism policy in Kenya, a lack of alignment between *Vision 2030* from 2007 and more recent (growth-oriented) policies – such as GoK, 2012 – and a general lack of policy enforcement may be called upon as possible explanations as to why respondents point towards a lack of institutional effort as the main challenge they are confronted with. For all three possible explanations (novelty; lack of consistency and lack of enforcement) evidence is found in the in-depth interviews. Interviewee no. 3, for example, clearly pointed to the novelty of the policy and institutions, and to a lack of clarity when observing that:

> *There was no clear vision for tourism from the government's point of view in the tourism sector. Ecotourism Kenya is now recognised as an association that advocates for sustainable tourism. The [2007] tourism policy is very clear about sustainable tourism and I think it will get more limelight* (interviewee no. 3).

Other interviewees clearly referred to a lack of enforcement by observing that only the government has the power to control policy implementation or financially support organisations and communities, and by suggesting that it does not avail itself of this power. The following two testimonies are representative of this:

> *Most organisations and destinations in Kenya use responsible travel as a marketing gimmick but don't practice it at all. This makes it difficult for real responsible tour operators to compete and stand out. […]. It is only the government that has the capability to control such malpractices* (interviewee no. 4).

> *The relevant bodies should come up with policies e.g. for compensating local communities for the loss of livestock [killed by wild animals] […]. The government should see to it that a bigger part of the tourism revenues should be ploughed back into the daily management of parks e.g. improve on the roads leading to the park and inside the park and alternative routes should be provided when the roads in the parks are completely impassable during rainy season. This way there will be reduced cases of off-road driving* (interviewee no. 10).

Going back to Table 5, it is also interesting to observe that only half of the respondents indicated that there is no demand for sustainable tourism products. It seems that, despite a generally low impact of chain partners on SMEs (Kivuitu, Yambayamba & Fox, 2005), their pressure is felt in Kenya by a substantial number of ITOs. This is corroborated by the in-depth interviews: 9 out of 10 interviewees observed that overseas partners are concerned about sustainable tourism and 8 out of 10 that promoting themselves as sustainable has brought an increase in tourists. The general feeling about whether chain partners ask about sustainability is well represented by the following statement:

> *Oh yes, they do. They will ask and cross check. There is a special brand of business that we do who would never be with us if we were not engaged in sustainable tourism (up to the meter). Most customers come from North America and Europe* (interviewee no. 9).

The insistence by the interviewees on overseas partners generates a question for further research: which markets do Kenyan ITOs, including the vast number who are not members of one of the category associations, service? It may be expected that the majority of ITOs in the informal economy cater for the domestic market and are therefore less open to pressure to choose a sustainable form of tourism.

In the absence of strong external motivation, internal motivation to engage in sustainable tourism unfortunately seems to be lacking, too: 70% of respondents signalled a lack of interest for sustainable tourism by ITOs. This finding, though, should be qualified. In-depth interviewees are strong in voicing their intrinsic motivation for joining sustainability. As interviewee no. 1 puts it: "*Ecotourism is a passion,"* while interviewee no. 3 adds: "*My personal desire is on empowering communities.*"

The reference to passion or to community development as reasons to engage with sustainability concurs with studies that have shown that several SME entrepreneurs in tourism and hospitality are not driven primarily by profit, but by a desire to improve their own or their family's quality of life (Lashley & Rowson, 2010). Yet the profit motive resonates vastly in the answers on motivations and benefits of sustainable tourism. For example, in answering an open question in the survey about the benefits of sustainable tourism, more than half of respondents pointed to the continuity of the business by ensuring its environmental resource base. This advantage points to the strong awareness of the dependence of Kenyan tourism on its pristine nature that was already noticed in discussing ITOs' understanding of CSR and sustainable tourism.

During the in-depth interviews the benefits of engaging in sustainable tourism are discussed at length. Interviewees generally agree that sustainable tourism is beneficial to their companies. All mention intangible benefits such as improved image, free publicity, and better co-operation with partners in the chain and with communities. A tangible benefit, growth in terms of market share and profits, is often mentioned as well (interviewees no. 1, 2, 3, 4, 7 and 8). This is well illustrated in the quote below:

> *I feel that sustainable tourism is good business, the company is reaping benefits now […]. We are doing a lot better even in the recession. Last year was the best*

year we have ever had. We have received more clients, have received many awards, and our relation with local communities is better (interviewee no. 1).

In conclusion, Kenyan ITOs generally recognise themselves in the challenges faced worldwide by SMEs that engage with sustainability (such as a lack of resources and information) and in the benefits that it can bring (such as new markets and clients). There also seems to be transfer of CSR along the chain, though this may be limited only to those ITOs that operate on the international market. In front of limited external pressure, and alongside personal motivation, a powerful driver towards sustainable tourism is the awareness that ITOs' commercial success is intertwined with environmental protection and community development. Kenyan ITOs do face specific challenges, such as a lack of governmental support, getting the trust of the community and answering human-wildlife conflicts. Both the similarities and differences should be considered in the debate on contextualising sustainability to a developing country setting.

Conclusions, limitations and recommendations

The central aim of this paper is to offer a contribution to the debate about the applicability of the classic definition of sustainability as value creation on an environmental, social and economic dimension to developing countries. Its main objective is to inform this debate with the perspective of local actors from a less well-researched sector, in this case tourism and Kenyan ITOs.

To reach this objective the research focuses on four main issues for investigation, derived from the existing literature on sustainable tourism and the role of tour operators. These issues concern the nature, extent, benefits and challenges of sustainable tourism in developing countries. On all four issues the study is able to shed some new light.

First of all, the results suggest that respondents (both in the survey and in the in-depth interviews) seem comfortable with the three dimensions of CSR introduced by Elkington in 1998. There even seems to be a slight bias towards environmental sustainability, though in the CSR activities mentioned the social dimension receives ample attention. Moreover, none of the respondents propose that philanthropy is their main CSR, while there seems to be a growing understanding that sustainability needs to be embedded in policies and processes of the organisation, and not be considered as a separate sets of activities.

Secondly, this study shows that activities already performed or planned by Kenyan ITOs cover the spectrum traditionally connected with sustainable tourism. Also when it comes to the extent of CSR, there seems to be a convergence between the understanding of Kenyan ITOs and their counterparts in other countries.

A third interesting result is that major benefits are considered to be intangible, with a stress on better relationships with the communities. If this result is connected with the concern felt by Kenyan ITOs for protection of the natural environment, the thought-provoking conclusion is reached that sustainable tourism may indeed bridge the gap between the conservation and development agendas, a gap that has often proven irreconcilable in developing countries (WCED, 1987). More tangible benefits in terms of market growth and business continuity are also mentioned, opening the possibility to qualify Butcher's (2011) statement that the socio-environmental agenda cannot be reconciled with the economic one. A quote from one of the in-depth interviews summarises the conclusion on this point.

If you look at ecotourism, it joins tourism, communities and conservation. You cannot conserve without realising the benefits of conserving (interviewee no. 10).

Furthermore, it has been shown that although the vast majority of respondents lament the lack of institutional pressure from the government (thus confirming that this is an issue in Kenya as Mayaka & Prasad, 2012, noticed), pressure from the demand side is building. Consequently, in the present study a transfer of sustainability across the tourism supply chain can be seen, both between ITOs and OTOs and between clients and ITOs. Yet, this is very probably limited to ITOs catering for the international (European and US) market.

Drawing these conclusions together it can be argued that the classic, "Northern" understanding of sustainability and CSR as value creation on an economic, social and environmental dimension is recognised and applied by developing countries' actors such as the Kenyan ITOs surveyed in this study. Though the study's results should not be interpreted as suggesting that no contextualisation is needed when applying sustainability to developing countries, it at least qualifies the statement from several literature sources that CSR is a Northern concept and so should not be expected to fit the needs of actors in developing countries (Blowfield & Fynas, 2005; Prieto-Carrón et al., 2006; Fox, 2004; Visser, 2008; Vives, 2008). We therefore contend that contextualisation should not be pursued at the level of the definition of sustainability and CSR or of the weight of their main dimension. It should be pursued at the level of implementation, by understanding the specific challenges that actors in developing countries are facing. An example encountered in this study on Kenyan ITOs concerns the human-wildlife conflict and the role of chain partners. More research is needed to reveal the challenges from the perspective of specific developing countries' actors.

The major limitation of this study is that only ITOs that are members of one of the two Kenyan category associations were sampled. This is understandable in an initial exploration, especially as at the time of the study no reliable information was available from the two associations on the size and ownership structure of their own members. Even though it is a clear limitation that ITOs that are not a member have not been approached, reaching this group of non-members that mostly operate in the sphere of the informal economy will not be easy. Nevertheless, a further study should attempt to sample their opinion as well. Replication of this study in Kenya is also recommended to assess whether the 2011 governmental policy and the renewed efforts from Ecotourism Kenya are having an impact on ITOs' engagement with sustainable tourism. There is also a need to probe deeper into the issue of pressure from chain partners, and whether ITOs catering mostly for foreign clients are feeling this pressure more than ITOs predominantly focused on the domestic market. Further insight is also needed into the business motives of the individual owner or manager to gain a better understanding of ITOs' motives for engaging in sustainable tourism. The reasons why owners of Kenyan ITOs have started their business, and whether these reasons connect with their motives to engage in sustainable tourism (Lashley &

Rowson, 2010) also merit investigation. Finally, replication in another developing country is also recommended to validate the main conclusion of this study in a broader context.

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Luxury and innovation: Towards an evaluative framework

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This conceptual paper uses a historical and psychological analysis of luxury to argue that it is has been, and continues to be, a driver of innovation in the tourism and hospitality industries. In examining the relationship between creativity and innovation, the paper identifies four paradoxes which, it argues, are embedded in the decision-making processes that create new objects and services. The paper argues that, if innovation and creativity are separated from the hegemony of change, then it is possible to devise a set of criteria as to what may be judged to be innovative. A set of seven criteria are postulated.

Keywords: innovation, luxury, creativity, design, history.

Introduction

The purpose of this paper is to explore innovation in tourism and hospitality by developing a conceptual framework that would define what innovative is, based on the notion that luxury is a driving force of innovation. In common parlance, words such as new, original, novel, creative, and change are used to imply that something is innovative. The random use of these words, in our view, exaggerates the quantity of innovation. We share the scepticism of Pandza and Thorpe (2010) as to how organisational change can qualify as being innovative. We take particular issue with the broad brush approach that argues that any "asserted change" is in some way worthy of the appellation innovative (Hjalager, 2010). We ask whether there are criteria that can be applied to tourism and hospitality products and services in a way that assists the judgement as to whether the outputs of a creative process are in fact innovative. By setting standards for what is innovative, we argue that an understanding of how innovative ideas can be judged is helpful to the creative processes of individuals or groups attempting to create something new in the field of tourism and hospitality. In other words, we believe that understanding the judgement process would be helpful to the supply side. We see innovation as the product of creativity and as such draw a distinction between creativity defined as the production of original and functional ideas, while we see innovation as being defined as the employment of those ideas. Innovation is the result of creativity (Weinzimmer & Michel, 2011). In making this distinction, our focus is primarily on the conceptual framework in which creative processes function rather than the psychological basis of them. Our approach is to work from the output towards the context in which it was produced.

Although we start from the perspective that innovation is the product of creativity within individuals and groups, we accept that creativity, even in the form of abstract thought, does not take place in a vacuum – there is always a psychological, social and physical context. Our analysis identifies the *concept of luxury* as a prime driver of innovation in tourism and hospitality. It is the strongest and most conspicuous influence on progress. This, we argue, is a clear lesson of history, which shows that it is conceptions of luxury that form the "mental material" from which springs consumer aspiration and creative supply, both of which act as the twin drivers of economic development. Luxury is powerful because it defines itself as to what it is; luxury is exclusive and distinctive and by definition this specifies what it is not. It is luxury objects that create aspiration but of equal importance is its power to delineate social groups within societies. In this capacity, luxury objects can be seen as boundary objects that define market segments as well as being able to transform them. Luxury objects and the need for luxury objects have a reciprocal relationship through the creative process and through market processes.

It is easy to forget on a beach or in restaurant that tourism and hospitality products and services have to be planned and designed. This deep background aspect provides a second element to the context, in that design carries within it philosophical and psychological options about aesthetics and markets that are brought into play by the nature of tourism and hospitality products and services and their consumer markets. These options form a platform within the individual's mind and shape their thinking about a new idea or concept. They influence the whole process from idea to the eventual realisation of the initial idea.

As luxury is central to our analysis, we begin by looking at the narratives within the history of luxury and the lessons that have relevance for modern day thinking.

Some lessons of history

Many words are associated with the idea of luxury; descriptors such as excess, surplus, superfluity, and opulence are

common and its relative status is captured by exclusivity and distinctiveness.

One of the clear narratives of history is that the corollary of such epithets includes descriptors that emphasise luxury's negative connotations, such as indulgence, idleness, ostentation, and lack of purpose or usefulness. Berry (1994) in a historical review of the concept of luxury highlights the debate between the economic benefits of luxury and its detractors with their claims that it erodes the moral character. The case that the production of luxury objects and services is beneficial to economic development is a clear historical narrative. Although the question of who benefits is a perennial issue, in aggregate terms it would be reasonable to assume that the demand for luxury would be driven by surplus wealth and leisure; at the individual level this connection and its influence may be more complex. Rojek (2000) challenges the Veblen (1899) thesis of the power of the leisure class at the individual level, pointing out that the some of the rich work very hard and have very little time for leisure. This argument, whilst plausible, does not however alter the aggregate picture of a dominant influence by the wealthy.

Brewer (1998) reviews the historical evidence from Adam Smith and David Hume on the transition from a feudal to a commerce-based society and points clearly to the moment when supporting a feudal community was substituted by expenditure on newly available luxury goods. It was, in his terms, a redistribution of surplus from maintaining a poor population to indulging in new materialism. However, this transfer brought forth a philosophical attrition between the claimed economic benefits of the commerce surrounding luxury and the arguments that its emphasis on excess induces indulgence, idleness and other elements that are said to contribute to "bad character". This attrition has a long historical thread that even today stalks modern concepts of luxury expenditure where excessive leisure exists alongside poverty and inequality. It is possible, for example, to argue that the modern luxury hotel could be a venue where such philosophical attrition becomes a behavioural reality, with the gap between the wealth of the guest and that of the server conspicuously active. Explanations as to why encounters of this type do not turn into enmity fall into two camps; social emulation and emotional labour.

Whilst it is not part of this paper to explain these processes themselves, it is important to note that explanations have a history that accompanies that of the philosophical tradition. Riley (1984), for example, explores a historical narrative to show that the philosophical conundrum need not lead to conflict and emphasises the role of social emulation where both the wealthy and the serving community appreciate the values of luxury (Lockwood, 1958; Pearce and Stamm, 1973). In the case of service employees, there is, at the very least, a "not factory" acceptance of the luxury environment as a workplace (Shamir, 1981). An alternative explanation comes in the form of emotional labour, where it is the capacity of service workers to apply surface acting (faking the emotional response) and deep acting (internalising the emotional condition necessary to the situation and to the organisational context) to moderate and accommodate behaviours that might ensue from a built-in inequality (Hochschild, 1983). Both these explanations have been analysed through atomised encounters (Riley, 1996) and in terms of the broader culture orientation and longer relations (Guteck et al., 1999; Ritchie and Riley, 2007). The qualitative study by Sherman (2007) draws out the important point that the guest too sometimes has to make accommodations to cope with the sensibilities of staff during interpersonal relations and that this can be psychologically problematic. What is significant here is that because the narrative of philosophical attrition continues, explanations as to why and how it is accommodated by individual behaviour are constantly sought. The socio-economic distance between the guest and the employee is a strategic issue for management but is also a factor in the design of products and services.

One thing is certain and that is that luxury means something beyond material necessity. It is in fact beyond both material and necessity. Only in the most fundamental terms could one say that someone "needs" hospitality in its basic form as food and accommodation. Yet, if the meaning of "needs" is extended beyond the material to include social and psychological then, even without extending the concept of "need" into "desire or preference", it is possible to suggest that "hospitality" in its social meaning is a need. Once needs can be defined beyond the material then they enter the realm of desires, which then makes them *open-ended*. It is this open-ended nature of desire that drives another historical narrative; the power of luxury objects to transform needs into desires and preferences (Berry, 1994). What modern marketing contributes to this process is not just the commercial power to induce desires but that individuals can identify with luxury objects, making them part of a life-style and crucially, in Levine's (1997) terms, an entitlement. However, a view from history argues that the process of transfer from need to desire is not only, as in the Veblen case, material aspiration based on invidious comparisons but one of learning and of cultural appreciation.

What these arguments cannot easily explain is why so many new products and services occur at the non-luxury mass market end of the spectrum. Examples are easy to spot – fast-food based on manufacturing production efficiency, and low-cost airlines are conspicuous. These "innovations" are propelled by the sensing of market opportunity and the readily available economic concepts of economies of scale and production efficiency. They are ideas about spreading access through distribution and cost efficiency – business innovation. Whether sensing opportunity is seen as creative depends on whether reading the asymmetry of market information is seen as a creative process; there is a strong case for this (Gartner, Carter, & Hills, 2003). These new products and services meet the requirement of being beyond necessity but are hardly beyond the material and are certainly not exclusive. Whether they engender aspiration, in the manner of luxury, depends on a judgement as to whether such consumption is on its way to something better.

The paradoxes of new product and service design

If it is accepted that luxury objects have the power to stimulate desire and induce preferences then the questions arise as to what is a luxury object and how does it elicit motives to consume? Behind the concept of luxury lie two basic motives that inhabit consumption; the first is the public desire within the individual to be distinctive and possibly ostentatious, which connects luxury to aspects of group and class differentiation. The intrinsic problem here for the creator of a luxury object is, if it is designed for a specific group, how will it cope with

social changes that affect the composition of that group? The second motive is the private desire to indulge the self. What is implied here is not the interpretation of indulgence as rampant hedonism but *knowledgeable self-reflection* that comes from culture – in psychological process terms, closer to Rerup's (2005) notion of *mindfulness*. It is this latter motive, which is internalised, that offers to the designer of a product or service the opportunity to seek out and build upon cultural values and appreciation.

From these basic motivations we argue that the creative process has to continually wrestle with four paradoxes. First, as one characteristic of luxury is exclusivity, where there is the paradox of rendering luxury products and services capable of responding to consumer pressure for mass distribution and therefore losing their exclusivity whilst simultaneously striving for, and maintaining, distinction. Products and services that were designed for exclusivity at the very least subliminally face the commercial temptation to become mass. The creative issue here is whether the design of the product or service could or should allow for extrapolation into the mass market. Here the use of rare materials and special high level skills are part of maintaining exclusivity. However, the pressure to democratise what is exclusive is ever present. Today, imitations of traditional haute cuisine and culturally specific ethnic dishes are globally accessible through supermarkets; in other words, high culture has been democratised. Exclusivity is not just an economic issue, it is a design issue. When luxury becomes accessible to mass this distinction from mass may need to be remade by means of, redesign, limited access, quality and branding. When a new brand or a new image is created, when a new hotel is designed and when a new dish is created in a kitchen, these are all products of an individual's creative process and we argue that the individual is more likely to be conscious of the paradox in the form of striving for distinctiveness against the background of uncertainty of appeal and the default temptation to go for mass appeal and commercial feasibility. However, we argue that such commercial feasibility always contains the design dilemma of – how distinctive? How new? This adds to the natural uncertainty which surrounds the creation of something new and draws in the second paradox because the fact of uncertainty and its consequent need for commitment by the designer involves philosophical inclinations.

The second paradox is that, on the one hand, creation can be out of a philosophical inclination to be responsive to consumer demand or, on the other, out of an egoistic inclination to create from purely personal imagination; the "build it and they will come" philosophy. To put it crudely, backing yourself or backing what market research says is a dilemma that is part of the creative process. In modern times it may be that the first option will be the favoured choice of the corporate world with the second being the home of the entrepreneur and the small independent business.

The third paradox acknowledges the historical and contextual continuum from which new material is created. In other words, whatever is conceived as being "new" was grown in the soil of existing history and culture. Whether history and context are a structure which inhibits or encourages creativity is an important issue. The perceived need for authenticity which has the status of a norm in tourism analysis could be seen as pressure that brings history into current creativity. It is not difficult to see that a discourse, within the individual designer of products and services, between historical tradition and modernism could have a stifling effect on innovation (Nuryanti, 1996). Can a product or service be either new or original and at the same time be authentic within some historical or cultural paradigm? This question is further complicated by the argument that authenticity in tourism products and services can be socially constructed by consumers (Kolar and Zabkar, 2010)

The fourth paradox is about duration and change over time. Many tourism and hospitality products are capital items and therefore will exist beyond the existence of the demand which engendered them. It may well be that the creators of a tourism product will bring into its design the fact that it will fade into something outside the original concept and possibly be adopted by an unintended market. The tourism literature has developed concepts such as lifecycle that represent changes in the attractiveness of a region or facility and report solutions, but do so without explanation of the creative processes that brought about regeneration (Romao et al., 2012)

We attempt now to show that these paradoxes concerning exclusivity, philosophy, cultural anchorage and forward projection are always present when the individual or group attempts to create something new because they imply decisions that have to be made about design and markets.

Transgressing borders, rules and norms; criteria for innovation

One way of looking at innovation is to expect it to be about originality and novelty. This perspective is an unresolved debate which ranges from the case of innovative thinking stemming from abstraction, image and imagination as against the position that innovation can be a matter of interpretation and adaptation of existing concepts and substantive knowledge. These positions are captured as psychological constructs by Kirton (1976) in his adaptor innovator theory. If we ask customers what they want, they are likely to answer only from what they already know. Even a request for something "new and different" is derived from an established knowledge base. What then is something "new and different"? And, can we apply criteria to its recognition and acceptance?

Similarly it is easy to argue that innovation stems from recognised opportunity or problem identification but these activities do not in themselves suggest solutions – they are just the important starting point. There is always a gap between identifying a need and meeting that need, but that gap does not necessarily kick-start the creative process. One way to perceive the creative process that follows is to ask: *what would an innovative solution or new conception look like? Are there criteria by which we can say – this is innovative?*

If innovation is about creating something new and about recognising opportunity, then the first criterion for innovation must be that it changes people's cognition and learning patterns associated with the output. In other words, it makes the individual see something differently and change their learning processes in order to appreciate it (van Aken, 2007). However, to change an individual's cognition, the innovation must make an impact. Consequently, the second criterion is surprise (colloquially – the wow factor). An innovative idea may not be truly original but it must have an "epiphany element"; which means there must be an element of surprise and of awe which is simultaneously recognised and appreciated, like

finding, in the next day's newspaper, the crossword clue you failed to get and admiring the inventiveness of the composer. Categorisation theory (Tajfel,1969; Turner,, 1985) tells us that new knowledge will be evaluated by existing knowledge categories but that does not mean that it is immediately normalised; something innovative may not immediately have the quality of "spread" necessary to turn it instantly into a generalised norm (Keil, 2005; Stibel,, 2006). In other words, the appraisal of the object, the placing of it in the person's cognitive world, is delayed when an object or service is original and surprising.

The third criterion is that an innovative idea must also cross some borders whilst remaining recognisable to those for whom it is intended. The borders to be crossed may be consumer or population categories exposing the new product to a new audience. What is known by one group may of course be entirely new to another. The borders may be those of taste within accepted population categories, appealing to the indulgent aspect of luxury and its capacity to teach appreciation. The democratisation and globalisation of ethnic food is a clear example. Marketing aims its strategies and branding at specific groups, but a concept that describes itself as innovation must, we suggest, cross some borders because it is the crossing of borders that causes the recognition that prior cognitive worlds need to be adjusted.

The fourth criterion is that an innovation must transgress rules and norms of the organisation and the market. The transgression of the socio-economic and marketing rules which govern the entry of new products and services into the market can be activated by disregarding the status quo as defined by marketing. If the new product or service is innovative, then it will come up against established rules and procedure in respect of production feasibility and marketing. Can something new be marketed in the same way as established products and services? Innovation should challenge marketing principles, forcing practitioners to match the innovation of the product or service with innovative marketing. However, the most significant aspect of the transgressive component is that it is new to customers and will transgress what they know and expect. Transgression of the aesthetic rules and rules of communication which govern people's understanding of, and acceptance of, a new product or service puts a heavy burden on making the new product and service recognisable but also on communication to customers. Innovation implies new approaches to communication. It is at this stage in the creative process where image and imagination play a central role. To be able to paint a picture of an innovative concept is as significant as creating the concept itself (Ward et al., 1999). What this transgression leads towards is the fifth criterion: that innovation implies risk. That is, *the acceptance of risk as being bound-up with the transgression of rules and therefore making it a prominent and necessary feature of innovation.*

If there is any lesson from the historical perspective, it is that innovative objects have the capacity to educate taste into wanting further innovation, thus the sixth criterion is that innovative product or service should infer that there is more to come. In other words, the consumer should be able to recognise that the object or service is on its way to something as yet unspecified.

The final criterion is that the innovation should have an affective component: something that causes immediate liking.

We argue that whether the new tourism and hospitality idea comes from inspired abstraction or adaptation of what is known, it can be judged to be innovative if it meets the seven criteria:

- That it changes cognition and learning processes
- That there is an epiphany element
- That it has the power to cross borders and change boundaries
- That it has the power to break through established norms, expectations and practices in consumer thinking, marketing and in organisation
- That there is an element of risk
- That it should be a path towards something further
- That it should be capable of being liked.

Creativity and organisation

At the outset, it is important to acknowledge that there is a danger in the famed uniqueness claimed by the tourism and hospitality industries. For one thing, it limits the breadth of thinking, particularly analogical thinking – looking for comparisons that are not obvious outside the industry (Gassmann & Zeschky, 2008). The more likely case is the introspective one where the industry uses "industrial recipes", that is, same issues same solutions across organisations (Spender, 1989). This may be one explanation for the conclusions of Hjalager's (2010) review of research into tourism and innovation which applied the standard industrial lens of innovation determinants and which found only limited evidence of innovation.

That said, the rationale for looking at innovation from the perspective of judging the output is that it reinforces the idea that creativity is a continuous process. Something new and original can be the product of a one-off project which is perfectly legitimate, but then it has to exist within and rub up against the status-quo; things change because of it rather than it being the product of change. The pragmatic context of innovation is, of course, the organisation, and we see innovation as an issue of organisational culture. The debate about the bureaucratic processes and routines of an organisation being seen as inhibiters or progenitors of innovative thinking is not central to our analysis. In tandem with this debate is the argument that information asymmetry is at the heart of the problem and can be tackled through knowledge management strategies (Nadkarni, 2008). Whatever the merits of such arguments, we argue that, organisations, as social entities, need continuous communication around change, opportunities and problems rather than ad hoc arrangements-such as projects and taskforces, however well focused. Even accepting the "stickiness" inherent in knowledge exchange forums (Szulanski,1996), we argue that tourism and hospitality employees with their propensity for pro-social attitudes are especially attuned to taking in the perspectives of colleagues and customers, which is one of the acknowledged facilitators of creativity (Grant & Berry, 2011**)**.

Discussion

Our analysis has shown that luxury is a spur to creativity and that the decision process involved in creating is imbued with paradoxes. We conclude that it is the aspiration property of luxury that can explain of how tourism and hospitality

products are developed. We acknowledge that to an extent our arguments have side-stepped the evidence of mass market innovation but we argue that it does not contest the aspiration thrust of our stance. Furthermore, as the gap between rich and poor widens, the role of the transfer of once luxury tastes to mass consumption will play a part in moderating potentially conflicting differentials by democratising luxury.

From this analysis we have attempted to develop a set of criteria for judging whether an object or service is innovative. To do this we have taken a perspective from the impact of the end-product in terms of how it is receive by the imagination rather than in terms of satisfaction. The criteria are subjective and possibly contentious, but our point is that judgemental criteria as to what is innovative give some guidance to the creative process in that it assumes a path creation approach to which the end will be novelty. At the core of the criteria are the enforced changes in cognition that promote learning, but these, it could be argued, are the possible implications of any systematic change. This is not disputed, but we argue that the other criteria suggest that the output is the product of deterministic creativity; that is where the designer's intention was to be novel for its own sake as well as for commercial success (Krippendorff, 2006).

This narrower perspective on innovation based on how its originality and its impact are evaluated will, we suggest, be more helpful to future progress than simply aligning creativity and innovation too immediately and too closely with the all-embracing and suffocating concept of change.

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Hotel quality in the European Capital of Culture: Leeuwarden 2018

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This research looks into the experience as perceived in 2014 by hotel guests in 15 bigger Dutch cities. The hotel reviews of Leeuwarden (Capital of Culture 2018) are compared to those of hotels in the other cities to provide an initial benchmark of how Leeuwarden hotels are performing. Literature shows that guest reviews have a significant influence on hotel booking behaviour, which affects hotel revenues and cities' reputations. For this study, reviews were collected from 51 review sites and analysed for 15 of the bigger Dutch cities with 10 hotels or more. Results showed that Leeuwarden hotels generally perform in the middle category, only being in the top three where it concerns "service". A concern is raised about the only 53% of positive guest reviews overall that were generated on Leeuwarden hotels compared to the 57% Dutch average. A quite positive outcome relates to the fact that in all of the six specific categories within the hotel product offer, Leeuwarden performed higher than the Dutch average. This was next to Leeuwarden only the case for Rotterdam and The Hague. Recommendations include the suggestions to further investigate in detail how individual hotels perform, to stimulate Leeuwarden hotel guests to leave more positive guest reviews on review sites, and for authorities to engage in stimulating the knowledge and skills of local hotel operators in order to be best prepared for the Leeuwarden Cultural Capital 2018 event.

Keywords: guest reviews, hotel performance, European Capital of Culture, service quality

Introduction

This research is the first in a series that explores and details the hospitality service related quality of northern Dutch city Leeuwarden in the context of the upcoming European Capital of Culture 2018 event. On September 6, 2013 Leeuwarden won the Dutch bid for the European Capital of Culture 2018 (Dijkstra & Klarenbeek, 2013). Together with Valetta in Malta, Leeuwarden will hold the title for one year. The European Capitals of Culture initiative was designed to highlight the richness and diversity of cultures in Europe, celebrate the cultural features Europeans share, increase European citizens' sense of belonging to a common cultural area, and to foster the contribution of culture to the development of cities (European Commission, 2014). The European Commission, furthermore, suggests that the European Capital of Culture initiative is an excellent opportunity for regenerating cities, raising their international profile, enhancing the image of cities in the eyes of their own inhabitants, breathing new life into a city's culture, and boosting tourism (European Commission, 2014). Receiving an increased number of probably mostly international visitors in 2018 will provide extra revenues for hotels, but will also put Leeuwarden's hospitality and accommodation sector to the test. Leeuwarden's European Capital of Culture 2018 (LECC18) organisation has installed a Hospitality team that is responsible for all hospitality related tasks. An estimated four million visitors are expected to visit the city, generating an additional 13% overnight stays in the Leeuwarden vicinity (Stichting Kulturele Haadstêd 2018, 2013). Although the LECC18 organisation expects to create "overnight accommodation in unusual places" such as using empty offices throughout the City and making use of little-used buildings in the countryside such as farms and churches, the initial search by potential visitors will certainly be for the established hotels in Leeuwarden.

In the exploration of Leeuwarden's hospitality provision, hotel quality is reviewed in a comparative research project that was set up between Stenden Hotel Management School, the Academy of International Hospitality Research (AIHR) and its Advisory Board member, and the Marketing Manager at Revinate, Thomas Landen. For the purpose of benchmarking Leeuwarden hotels' overall perceived quality, this research looks at guest review scores from 51 review sites. We compared this data against those in the other cities in the Netherlands that are in the top 25 largest cities in the Netherlands and that have 10 hotels or more. Furthermore, an overview is presented that shows the guest reviews on some of the important categories within Leeuwarden hotels' provision compared to the hotels in other cities. The main questions addressed in this research are:

- What is the overall quest review score of Leeuwarden hotels compared to the other major Dutch cities with 10 hotels or more?
- How do Leeuwarden hotels' guest reviews in particular important categories compare to those of the other major Dutch cities?

This comparative research provides the Leeuwarden's European Capital of Culture 2018 organisation, Leeuwarden Municipality, the Province of Fryslan and the Leeuwarden hotel sector with a tangible indication of how the hotel sector compares to those of its main fellow Dutch cities. More

detailed follow-up research can be initiated to identify actions needed to improve Leeuwarden's hotel provision.

Literature review

European Capital of Culture

The Greek actress, singer and politician Melina Mercouri proposed the creation of a European Capital of Culture in 1983, and the European Union formally established the programme in 1985 with Athens as the first title-holder in 1985 (Ghincul, 2014). Other sources state that it was a joint initiative of Melina Mercouri together with Jack Lang that aimed to bring the people of Europe closer together by celebrating the key role played by cities in European culture (Marseille-Provence, 2013). This European Capital of Culture, according to one of its former organising committees, allows a unique encounter between local populations, artists, and visitors from all over the world and reflects the vibrant tradition of hospitality at the heart of regional culture. Experiences in previous European Capitals confirm the stimulating effect the event has for the city involved. An impact study on Istanbul ECC 2010 revealed that leading stakeholders in the business world said that the event created employment opportunities in sectors such as communication, operations, training and design (Ozan & Unver, 2012). Even more strongly in Liverpool ECC 2008 it was concluded that the festival year saw 9.7 million visitors to the city – an increase of 34% – and generated £753.8 million for the economy. Media coverage of Liverpool's cultural attractions doubled and for the first time in decades, positive stories outweighed negative ones focusing on social issues. The study found that 85% of Liverpool residents agreed it was a better place to live than before (Carter, 2010). One of the important elements in the bid plan for becoming European Capital of Culture is the organising city's ability to ensure that the tourist and visitor capacity of the city can cope with the targets set out in the plan. This covers hotel capacity, transport links, and soft skill areas such as visitor languages, quality of hospitality and welcome programmes (both in the public and private sectors) available in the city (European Commission ECOC, 2014). Hospitality is one of the factors besides culture and language that needs to be competitive before a successful bid of a city is awarded and part of the hospitality offer of a city is provided by its hotel sector.

Hotel guest reviews

Guest reviews are important for hotels because they influence the likely bookings and revenue generated by them. Today, a company's reputation can be ruined in a matter of minutes, as disgruntled customers or even competitors can broadcast damaging information instantaneously across the world via the internet and social media, often under the "guise of anonymity" (Dennis, 2013). Successful management of a company's online reputation has a significant relation to a company's business performance. In 2012, one of the companies specialised in tracing guest reviews providing hotels with infographics estimated that by 2013 there would be an average of 465 reviews per hotel while in 2008 there were only 88 (Breure, 2012). Furthermore, the following statistics were noted: 81% of hotel bookers find hotel reviews important, 46% post hotel reviews, and 49% would not book at a hotel without reviews. To illustrate the enormous real growth in the number of reviews per hotel and its importance, Revinate, which specialises in collecting guest reviews, calculated that in 2014 the number of reviews per hotel in the Netherlands had grown to over 729 and 93% of travellers worldwide say online reviews have an impact on their booking decisions (Landen, 2015). Competitive pressure is higher than ever, knowing that, on average, travellers consider seven properties before making a booking. Hoteliers now also have realised too well how critical it is to optimise their online reputation; 98% of hoteliers say reviews are influential in generating bookings (Revinate, 2014). Improvements to a hotel's online reputation bring benefits. Revinate calculated that increasing a hotel's rating by 1 point (on a 5-point scale), allows the hotel to increase their daily rate by 11.2% without affecting the likelihood of decreasing the number of bookings. Similarly, Ye, Law, Gu, and Chen (2011) found that a 10% increase in overall review rating resulted in a boost of online bookings by more than 5%. It is apparent that a hotel's service quality has great influence on its online reputation, as service quality is one of the main drivers for guests to leave reviews according to Serra Cantallops and Salvi (2014). Other views on why guests produce reviews exist, however. According to Bronner and Hoog (2011), the most frequently mentioned motivation for leaving web-based comments was not so much the service quality itself but for 70% to help future guests to make proper decisions. Although Bronner and Hoog focused on periodic review writers for specific websites and not so much on booking engines, it is apparent that people write reviews for many reasons. Serra Cantallops and Salvi (2014) concluded that there is still no clear definition about what generates guest reviews, but it is certain that they are important for hotel business.

Research design

To answer the questions addressed in this research; what is the overall quest review score of Leeuwarden hotels compared to the other major Dutch cities with 10 hotels or more? and wow do Leeuwarden hotels' guest reviews in particular important categories compare to those of the other major Dutch cities? a comprehensive web search was performed using Revinate's guest feedback web crawling research system. As criteria for defining the search, the number of inhabitants to identify the major Dutch cities (including Leeuwarden) was taken and the number of hotels in these major cities as mentioned by TripAdvisor, taking Leeuwarden as the bottom-line. In terms of size, Leeuwarden was listed no. 25 in the Netherlands. We discarded cities that had a full tourism profile (Noordwijk and Valkenburg) which then put Leeuwarden with its number of 10 hotels around place no. 15. Therefore the decision was taken to look at the 15 Dutch cities having 10 or more hotels as mentioned by TripAdvisor. The cities that fitted the criteria are listed in Table 1 with their relative size within the Netherlands and the number of hotel properties.

There are more types of accommodation in the cities included in this research that are not strictly defined as hotels or not mentioned in TripAdvisor. Based on the reputation of TripAdvisor as a review site, being the second biggest in both the Netherlands and Europe, enough confidence was found with the choice. The most frequently used review sites in The Netherlands are: 1. Booking – 62%, 2. Tripadvisor – 12%, 3. Hotelspecials.nl – 6%, 4. Zoover – 4%, 5. Hotels.com – 4%, while in Europe the order is: 1. Booking – 62%,

2. Tripadvisor – 22%, 3. Hotels.com – 5%, 4. Expedia – 3%, 5. Holiday Check – 2% (Landen, 2015)(Landen, 2015). In The Netherlands in 2014 a total of 51 channels were identified where people visiting the hotels in the 15 selected cities in this research left their feedback and ratings for hotels. In Table 2 the review sites are listed.

Findings

The first set of findings related to the reviews and review scores of the Netherlands overall and in the 15 major cities as could be found on the websites used for this research (Table 2) are shown in Table 3.

The guest review sample sizes for the cities in this research varied between 3 618 minimum (Dordrecht) and 249 001 maximum (Amsterdam). Without providing any measures of statistical significance for the samples used in this research, it would still be justifiable to conclude that because of the number of reviews per city a relatively robust review package was collected. When comparing the average review rating (ARR) between the cities, Leeuwarden came out at rank 6 (ARR: 4.04), a slightly higher average review rating than the Dutch

Table 1: Major cities (15) ≥ 10 Hotels

City/NL 2014	Inhabitants	Properties	City/NL 2014	Inhabitants	Properties
Netherlands	16 877 351	852	Nijmegen (10)	168 840	10
Amsterdam (1)	813 562	224	Haarlem (13)	155 758	11
Rotterdam (2)	619 879	41	Arnhem (15)	151 356	10
The Hague (3)	510 909	34	Zwolle (20)	123 507	10
Utrecht (4)	330 772	12	Maastricht (21)	121 906	17
Eindhoven (5)	221 402	17	Leiden (22)	121 249	11
Groningen (7)	197 823	13	Dordrecht (23)	118 782	10
Breda (9)	180 420	10	Leeuwarden (25)	108 249	10

Table 2: Review sites (51) accessed for guest reviews in this research

4TravelJapan	Google+ Local	Marriott Rewards	Travelocity
Ab-in-den-Urlaub	HolidayCheck	Marriott Verified Reviews	TripAdvisor
Agoda	HostelBookers	Orbitz	Trivago
AsiaRooms	Hostels.com	Priceline	Venere
Atrapalo	HostelWorld	PriceTravel	VirtualTourist
BestDay	Hotel.de	Qunar	Virtuoso
Booking.com	Hotels.com	Reviewz.eu	Weekendesk
Ctrip	Hotels.nl	Revinate Surveys	WestCord
Despegar	Hotelspecials.nl	Routard	Wotif
Dianping	HRS	Skoosh	Yahoo Travel
Expedia	IHG Guest Reviews	Starwood	Yelp
Facebook	LateRooms	TabletHotels	Zoover
Fodors	Mafengwo	Tophotels.ru	

Table 3: Reviews and review scores (cities ≥ Leeuwarden, ≥ 10 hotels)

City/NL 2014	Total reviews	Average review rating	Rank	Positive reviews %	Rank	Rev pace (rev/wk/prop)	Reviews per property
Netherlands	*621 169	4.00		57		14.0	729.1
Amsterdam	249 001	3.97	**11	57	7	21.3	1 112.0
Rotterdam	33 885	4.15	2	64	2	15.8	858.0
The Hague	26 039	4.08	4	59	3	14.6	765.9
Utrecht	10 743	3.95	**12	51	***13	17.2	895.3
Eindhoven	15 105	4.08	4	59	3	17.0	888.5
Groningen	10 402	3.89	**14	44	***15	15.3	800.0
Breda	4 677	3.87	**15	45	***14	9.0	467.7
Nijmegen	4 559	4.03	8	55	9	8.7	455.9
Haarlem	6 047	3.93	**13	52	***12	10.5	549.2
Arnhem	7 335	4.09	3	59	3	14.1	733.5
Zwolle	4 966	4.03	8	58	6	9.5	570.7
Maastricht	19 710	4.02	10	54	***10	21.8	1 159.4
Leiden	8 944	4.04	6	56	8	15.6	813.0
Dordrecht	3 618	4.18	1	67	1	6.9	361.8
Leeuwarden	5 116	4.04	6	53	***11	9.8	511.6

*More reviews were added up for the overall NL score than represented in the 15 cities displayed here. The total number of reviews used in this comparative research for the 15 cities is 410 147

**Cities with a lower average review rating that the overall NL score of 4.00

***Cities with a lower percentage of positive reviews than the overall NL percentage of 57%

overall ARR of 4.00. Amsterdam, Utrecht, Breda, Haarlem and, interestingly another city in the north of the Netherlands, Groningen, had ARR's lower than the Dutch average.

The percentage of positive review scores (PR) put Leeuwarden in the middle category at position 11/15 and 4% lower than the Dutch overall percentage of 57%. Amsterdam had a percentage of exactly the Dutch overall, while Dordrecht, Rotterdam, The Hague, Eindhoven, Nijmegen, Arnhem, Zwolle and Leiden had a higher percentage than the Dutch overall. Looking at this measuring of PR, the other northern city Groningen came out at the lowest PR of 44%.

Review pace per week per property and numbers of reviews per property showed that the intensity of reviewing is the highest in Maastricht, followed by Amsterdam, Utrecht, Eindhoven and Rotterdam. On the low end were Dordrecht, Nijmegen and Breda, while Leeuwarden was close to their numbers at an average of 9.8 reviews per property per week and on average 511.6 reviews per property.

Categories mentioned in Dutch hotel reviews

Table 4 lists the categories related to the more detailed aspects of the hotel offering. The number of times mentioned, and the percentages of positive, neutral and negative mentions express some guest review sentiment in terms of the importance hotel guests attach to the different categories.

Rooms, service, facilities, general staff, F&B, location and value were mentioned most in the hotels overall. General staff had a relatively high percentage of positive/neutral mentioning (95%), which seems to indicate that hotel guests are not that critical about the people taking care of them. This finding is somewhat reconfirmed by the percentage of positive/neutral mentioning on service (92%). Bathroom (26%), security (23%), manager intervening (22%), room service (22%), value (21%) and check in/out (20%) showed a relative high percentage of negative mentioning. In these categories, one or more out of five customers wrote a negative review.

Review scores on main categories

Finally, a detailed breakdown was made on the review scores for a selection of the main categories within hotels in each city (see Tables 5 and 6). For the purpose of providing a relevant overview the choice was made to select five of the most mentioned eight categories: "location" (indicator important for getting an impression about the hotel in its city context), "rooms" (as the indicator of the physical core product of the hotel), "cleanliness" (as an indicator of hygiene, and potentially health related issues), "service" (indicator of hotel product delivery quality) and "value" (indicator of how guests perceived the overall offer in relation to the price they paid). There may be arbitrary choices incurred in using the categories as indicated, but we considered them to provide the most representative sample of the hotels' quality in the guests' perception.

The overall score on the chosen five categories in most cases was the same as for all the 23 categories listed in Table 3 (column 3) with only minor differences of 0.01 point. Exceptions were Groningen and Zwolle, which both had a 0.09 higher review score on the five categories than on the overall score on all the categories in Table 3. Dordrecht, Rotterdam and Zwolle had the highest overall scores, while Utrecht, Haarlem and Breda received the three lowest scores. Together with Groningen and Amsterdam, these cities were below the Dutch overall score. Leeuwarden's overall 4.03 review score was in the middle (8) and 0.03 above the Dutch overall average.

For "cleanliness", Dordrecht (4.41) and Zwolle (4.39) had observably higher scores than the other hotel cities, leaving Leeuwarden at the fourth position with 4.24. Another

Table 4. Categories mentioned in reviews (positive and negative)

	Topic category	Mentions	% Positive	% Neutral	% Negative
1.	Overall	1 103 505	62% (685 339)	25% (274 410)	13% (143 756)
2.	Rooms	324 765	55% (178 349)	27% (88 620)	18% (57 796)
3.	Service	311 089	74% (230 285)	18% (56 054)	8% (24 750)
4.	Facilities	234 263	60% (140 349)	29% (68 597)	11% (25 317)
5.	General Staff	201 563	84% (168 937)	11% (22 530)	5% (10 096)
6.	Food / Beverage	150 490	65% (97 790)	23% (34 118)	12% (18 582)
7.	Location	135 907	69% (94 251)	25% (34 592)	5% (7 064)
8.	Value	118 041	47% (56 027)	32% (37 285)	21% (24 729)
9.	Breakfast	72 869	62% (45 163)	24% (17 804)	14% (9 902)
10.	Cleanliness	54 159	68% (36 644)	17% (9 322)	15% (8 193)
11.	Bathroom	47 265	42% (19 771)	33% (15 362)	26% (12 132)
12.	Waitstaff	33 024	84% (27 750)	11% (3 699)	5% (1 575)
13.	Front Desk	31 290	64% (20 082)	22% (6 847)	14% (4 361)
14.	Checkin/out	10 685	45% (4 789)	36% (3 797)	20% (2 099)
15.	Restaurant	8 477	60% (5 055)	26% (2 199)	14% (1 223)
16.	Bar	6 236	63% (3 909)	25% (1 529)	13% (798)
17.	Housecleaning	6 173	53% (3 246)	30% (1 849)	17% (1 078)
18.	Bellstaff	3 788	70% (2 667)	21% (780)	9% (341)
19.	Security	3 183	32% (1 027)	44% (1 415)	23% (741)
20.	Manager	2 805	50% (1 404)	28% (783)	22% (618)
21.	Concierge	2 621	77% (2 021)	15% (405)	7% (195)
22.	Room Service	1 839	50% (915)	28% (521)	22% (403)
23.	Lobby	1 680	69% (1 158)	21% (347)	10% (175)
24.	Recreation Staff	65	62% (40)	23% (15)	15% (10)

important category to consider within the hotels offer was the guest reviews on "location". Leeuwarden was among the four most appreciated cities in terms of the hotels' locations, scoring 4.22, with only Rotterdam (4.32), The Hague (4.32) and Amsterdam (4.29) getting higher review scores. In contrast to the "overall" and "cleanliness" scores that ranked Dordrecht no. 1, the "location" guest review score put the Dordrecht hotels at the last position (3.80).

In the category "rooms", Haarlem (4.17), Zwolle (4.13) and Leiden (4.12) were most appreciated by guests. Groningen (3.68), Breda (3.77) and Utrecht (3.85) scored the lowest guest reviews in this category, while Leeuwarden was also on the lower end (3.96) but still on par with the Dutch average score on "rooms". In terms of "service", Zwolle (4.37), Dordrecht (4.30) and Leeuwarden (4.29) were the top 3 performers and Nijmegen (4.06), Breda (4.14) and Groningen (4.15) the three lowest. Finally, in terms of "value" guest reviews showed the highest hotel scores in Zwolle (4.20), Dordrecht (4.19) and Rotterdam (4.06) followed in position five by Leeuwarden (4.03). Same as in the category "service", Nijmegen (3.87), Breda (3.86)) and Groningen (3.89) showed the lowest three guest reviews on "value".

Table 7 shows the categories per city in which hotels in a particular city received a lower guest review score than the Dutch overall average score in the particular category. Rotterdam, The Hague and Leeuwarden scored in each of the categories overall (for the six selected categories, "overall", "cleanliness", "location", "rooms", "service" and "value") higher than (or the same as) the Dutch overall score for the particular category. At the other end, Utrecht, Groningen and Breda scored lower guest reviews on all categories. Except for Maastricht , the cities that combined lower scores on service and value also underscored on the category "overall".

Conclusions

The questions addressed in this research are: what is the overall quest review score of Leeuwarden hotels compared to

Table 5: Review scores on main categories: overall, cleanliness and location

City/NL 2014	Overall	Rank	Cleanliness	Rank	Location	Rank	< NL
Netherlands	4.00		4.15		4.18		
Amsterdam	3.97	*12	4.22	8	4.29	3	1×
Rotterdam	4.14	2	4.24	4	4.32	1	0×
The Hague	4.08	5	4.23	6	4.32	1	0×
Utrecht	3.94	*13	4.09	*11	4.04	*11	3×
Eindhoven	4.08	5	4.14	*9	4.20	6	1×
Groningen	3.98	*11	3.95	*14	3.95	*13	3×
Breda	3.87	*15	3.96	*13	3.94	*14	3×
Nijmegen	4.03	8	3.82	*15	4.22	4	1×
Haarlem	3.93	*14	4.25	3	4.10	*8	2×
Arnhem	4.09	4	4.11	*10	4.19	7	1×
Zwolle	4.12	3	4.39	2	4.02	*12	1×
Maastricht	4.02	10	4.05	*12	4.07	*9	2×
Leiden	4.04	7	4.23	6	4.06	*10	1×
Dordrecht	4.18	1	4.41	1	3.80	*15	1×
Leeuwarden	4.03	8	4.24	4	4.22	4	0×

*Lower than the overall NL score

Table 6. Review scores on main categories: Rooms, Service and Value

City/NL 2014	Rooms	Rank	Service	Rank	Value	Rank	<NL
Netherlands	3.96		4.20		3.97		
Amsterdam	3.97	9	4.19	*7	3.92	*10	2×
Rotterdam	4.09	4	4.23	5	4.06	3	0×
The Hague	4.06	6	4.24	4	4.02	8	0×
Utrecht	3.85	*13	4.17	*11	3.89	*12	3×
Eindhoven	3.98	8	4.20	6	4.03	5	0×
Groningen	3.68	*15	4.15	*13	3.89	*13	3×
Breda	3.77	*14	4.14	*14	3.86	*14	3×
Nijmegen	3.99	7	4.06	*15	3.87	*15	2×
Haarlem	4.17	1	4.17	*11	4.03	5	1×
Arnhem	3.90	*12	4.19	*7	4.04	4	2×
Zwolle	4.13	2	4.37	1	4.20	1	0×
Maastricht	3.95	*11	4.19	*7	3.91	*11	3×
Leiden	4.12	3	4.19	*7	4.01	9	1×
Dordrecht	4.09	4	4.30	2	4.19	2	0×
Leeuwarden	3.96	10	4.29	3	4.03	5	0×

*Lower than the overall NL score

Table 7. Review scores on main categories

City/NL 2014	Categories scoring lower than Netherlands overall	Overall	Cleanliness	Location	Rooms	Service	Value
Rotterdam (2)	0×						
The Hague (3)	0×						
Leeuwarden (25)	0×						
Eindhoven (5)	1×		√				
Zwolle (20)	1×			√			
Dordrecht (23)	1×			√			
Leiden (22)	2×			√		√	
Amsterdam (1)	3×	√				√	√
Nijmegen (10)	3×	√				√	√
Maastricht (21)	5×		√	√	√	√	√
Utrecht (4)	6×	√	√	√	√	√	√
Groningen (7)	6×	√	√	√	√	√	√
Breda (9)	6×	√	√	√	√	√	√

the other major Dutch cities with 10 hotels or more? and how do Leeuwarden hotels' guest reviews in particular important categories compare to those of the other major Dutch cities? To answer these questions, guest reviews were collected from 51 websites where guests post their experiences and perceptions of the hotels they visited. The scores were taken at face value without using any statistical analysis other than calculating the mean scores. The scores were in a rather narrow band within a range of maximum 0.59 difference between the highest and lowest guest review, which is lower than 12%. Differences are relatively small but looking at the high numbers of reviews in the samples per city (between 3 618 and 249 001), it would be fair to draw some conclusions based on the findings in this research.

At rank 6, Leeuwarden seems not to be prominent in the overall hotel review score per city, but still with a 4.04 above the overall Dutch city average of 4.00. Having only 53% of positive guest reviews, however, Leeuwarden stays below the overall Dutch city outcome of 57% positive guest reviews. This outcome puts Leeuwarden at place 11 out of 15 and provides "food for thought", because it raises the question: "why do only slightly more than half of the hotel visitors leave a positive review?" Leeuwarden lags behind compared to another small city such as Dordrecht, which has 67% (two-thirds) positive reviews. Further research focusing more in-depth on the individual hotels in Leeuwarden would be needed to find out why there is this relatively low percentage of positive reviews. In terms of review pace (reviews per hotel per week) and the number of reviews per hotel, Leeuwarden was in the lower half of the 15 cities compared in this research. Drawing conclusions on why the review pace and number of reviews per hotel are low is difficult, although the results appear to be in line with those of the other smaller Dutch cities such as Dordrecht and Zwolle. It is not the full explanation because, contrastingly, other small cities such as Maastricht and Leiden show double or 150% of the review pace/number of reviews per hotel compared to Leeuwarden. Important for Leeuwarden hotels certainly is to increase positive guest reviews because, as mentioned in the literature review, increasing a hotel's rating by 1 point (on a 5 point scale), allows the hotel to increase daily rate by 11.2% without affecting the likelihood of decreasing the number of bookings. Öğüt & Onur Tas (2012) also stress the importance of customer rating where they calculated that an increase in hotel star rating does not increase hotel sales, whereas increases in customer review ratings do increase hotel sales.

The more detailed reviews per category show a more favourable picture of Leeuwarden hotels compared to those in the other hotel cities. Although still generally performing in the middle segment where it concerns guest reviews, it is interesting to observe that Leeuwarden together only with Rotterdam and The Hague in all of the categories "overall city score", "cleanliness", "location", "rooms", "service" and "value" has guest review scores above (or on) the Dutch overall score. This means that based on the outcome it would be justified to say that Leeuwarden, although not performing top three in any category except for "service", is one of the few cities not underperforming compared to the Dutch overall guest review scores. Furthermore, "cleanliness" and "location" are in the upper scoring guest review categories. The overall conclusion about Leeuwarden hotels, therefore, is that:

- they are above the Dutch average at both city level as well as on the six categories identified specifically in this research
- the number of positive reviews is on the low end and, slightly worryingly, just above half of the total reviews
- they are above Dutch average in all of the six identified categories and no.3 in service.

Recommendations for further research

Further research is needed in more detail to complement and further refine the findings of this exploratory research into the quality of Leeuwarden hotels, to identify where specific improvements can be realised. Also, research is needed on how Leeuwarden hotels can stimulate their guests to leave more positive reviews (and less negative) about their stay. For the hotel practice in Leeuwarden in the context of Cultural Capital 2018, it will be essential to provide a well-organised and effectively operated package of products and services that satisfy and preferably exceed the needs and expectations of international guests visiting the city. For the local and provincial authorities it will be important to offer dedicated resources such as training funds and knowledge for the Leeuwarden (Frisian) hotels in order to stimulate a positive guest experience. On this latter issue, cooperation

with the local institutions of vocational and higher education in hospitality and tourism can provide significant value.

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An ethnographic study of tourist psychological states: Implications for festivities and events

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This is the first study that explores in such depth the emotional dimensions of visitors at numerous and various events held around the world, for almost ten years. Unexpected findings and new knowledge provide novel directions to the new millennium tourism stakeholders, and the tourism/psychology research community. Strong positive emotions are found to be the outcome of the unexpected, genuine hospitable offerings and a holistic sense-fulfilling experience at events/festivities. The tangibilisation of the visitor's experience with certain stimuli may lead to strong cognitive/emotional associations with a specific destination which will endure even for a lifetime. Even so, if a destination aims to stage an event/festival, then they must to it properly otherwise the negative impact on the attendees' emotional state may influence adversely their perception even towards the destination as a whole. Interestingly, the emotion of "frustration" was found to lead towards a revisit intention, "embarrassment", though, probably not. Surprisingly, "anger" and "frustration" do not have the same negative effect as "boredom" has on the behaviour of event attendees. An unexpected study finding is the fact that certain negative emotions, such as "sadness", may even add psychological value to a specific visitor experience.

Keywords: tourism, psychology, emotions, events

Introduction

Various countries and cultures within them have a rich tradition of ceremonies, rituals and festivities extending over thousands of years. These traditions have greatly influenced many *events* as they are celebrated nowadays which include exhibitions, fairs, festivals, shows, parades, cultural celebrations, sporting and social events and other forms of public celebration (Wagen & White, 2010; Bowdin et al., 2012). The core phenomenon of events is the experiences and the meanings attached to them (Ziakas & Boukas, 2014). In Sweden, many customs are closely associated with the changing seasons. "Swedes celebrate summer with an intensity that can only be found in a people who have just endured a long, dark winter …" (Tidholm & Lilja, 2004, p. 2). Tourism has been a key force in promoting festival growth and expansion, while destinations (i.e. regions and towns) are increasingly keen to share their culture, environment and spending opportunities with visitors through the promotion of festivals. Cultural festivals have emerged as an instrument for developing tourism and expanding seasonality, improving city image and boosting regional economies (Okech, 2011). The positive economic impacts of events upon destinations are acknowledged not only by the research community but also by tourism stakeholders. A national festival held throughout India was found to revitalise the entire nation's economy (Gaur & Chapnerkar, 2015). The study of Taks et al. (2013) found that sport-event participants account for 39% of aggregate spend (i.e. on hospitality and retail), with coaches and athletes also spending money while at the destination. Cultural events are also supported to be contributors to the implementation of tourism during the low season, such as the case of Easter festivities in the island of Sardinia (Giudici et al., 2013). Wine festivals, for example, provide a number of benefits for stakeholders, which include revenue and recognition generated for the participating wineries, enhanced awareness of the area and a new source of customers for the community and outside providers. Positive future visitation benefits for the wineries staging the festivals and the wider industry are also reported as a result of such festivals (Houghton, 2001).

By focusing on Charleston's hotel occupancy changes, the study of Litvin, Pan and Smith (2013) validates the increased tourism income due to rising accommodation prices during festivals and events, which can provide a significant boost to the local economy. Even so, researchers (i.e. Ellert et al., 2015) make reference to the complexity of events, which may even lead to event failure. For instance, one such complexity involved is the challenge of providing an overall satisfactory attendee experience, the importance of which in the successful performance of events such as festivals is highlighted in several studies (e.g. Lee, Yang, & Lo, 2008; Cheng, Chang & Dai, 2015). Yet, in spite of the connection and importance of emotions (i.e. negative/positive) with satisfaction (White & Yu, 2005), it appears evident that their consideration in the overall experience of event attendees is neglected even in recent research studies. A number of researchers (i.e. Brown & Hutton, 2013, Mair & Whitford, 2013; Pan & Huan, 2014; Wood & Moss, 2015) call for further event investigations from a psycho-social perspective, while more specifically, Bulger (2013) stresses the emotional dimensions of people, which could benefit stakeholders and

reveal novel information of great significance for destinations hosting successful events.

Experiences and emotions: A psychological perspective

The impact of events and festivities is not only valued in monetary terms since the experiences being generated may favourably impact on the satisfaction, well-being, positive psychology and behaviour of people. The study of Ramchandani and Coleman (2012) at three major sport events revealed that around two-thirds of the respondents reported that their experience had inspired them to increase their participation in sport or physical activity. In their qualitative approach of analysing the impacts of "Ganesh Chaturthi" annual Indian festival, Gaur and Chapnerkar (2015) concluded that the event promoted amongst others, communal harmony. Wine festivals were also found to offer the opportunity to socialise with friends and family, whilst enjoying natural settings and products (Houghton, 2001). By focusing on well-being and "happiness" studies, Wood and Moss (2015) evaluated the emotional responses experienced by event attendees and initiated a starting point in the better understanding of the complexity of emotional effects triggered at (live music) events. They argued the usefulness of emotional responses as a significant indicator of future behaviour. In their study, Liljander and Strandvik (1997) found that customers experience different (positive/negative) emotions which consecutively influence their satisfaction. Another study (Chiappa, Andreu & Gallarza, 2014) found that the cluster of visitors at a museum with higher positive emotions reported being more satisfied with their experience compared to the other group. The researchers concluded that emotions are more significant than cognitive aspects in shaping visitors' satisfaction.

Koenig-Lewis and Palmer (2014) note that models of customer satisfaction have been dominated by cognition rather than emotional affects, which are under-researched. The study of Tronvoll (2011) found that the negative emotion of "frustration" was the best predictor of complaint behaviour towards service providers. Svari and Erling Olsen (2012) established that increased levels of emotions as a result of negative service incidents may lead to complaints via negative word-of-mouth in social media and blogs. The examination of emotions has been regarded in various contexts such as in the case of a Norwegian hospital in which nurses were asked to reflect "forwards" and "backwards" about their emotional experiences to work changes. Emotion terms such as "uncertainty", "joy", "resignation", "anxiety", "excitement" and "frustration" were reported (Giæver & Smollan, 2015). Researchers (i.e. Barbalet, 2004; Tan et al*.,* 2005) make reference to the increased recognition of the existence of emotions in everyday interpersonal interactions and social activities, while Kalat (2011, p. 437) states that "all of our emotions, within limits, provide richness to our experiences". Others (i.e. Fredrickson & Losada, 2005) concur that a happy mood increases someone's readiness to explore new ideas and opportunities that will help maintain their happy mood. Levine and Pizarro (2004) note that people remember emotionally arousing information better than neutral information. Also, emotions adjust our priorities: "If you are running away from a mad attacker with a chainsaw, you don't stop to smell the roses" (Kalat, 2011, p. 423).

Psychologists have no consensus on how many types of emotions people have. Some propose a short list, such as, happiness, sadness, anger, fear, disgust, and surprise. Others add contempt, interest, frustration, love, embarrassment and boredom. Many consider surprise as an emotion which occurs when events do not match expectations. (Keltner & Buswell, 1997; Kalat, 2011). People tend to remember previous events that were surprising (Parzuchowski & Szymkow-Sudziarska, 2008; Kalat 2011). Emotional expressions are not altogether arbitrary. For instance, when people are frightened, they open their eyes wide, increasing their ability to see dangers, and inhale deeply, preparing for possible action. If they see something disgusting, they partly close their eyes and turn their nose away from the offending object, decreasing therefore their exposure to it. The wide-open eyes of a frightened face makes someone look more childlike and worthy of sympathy, whereas the narrowed eyes of angry people make them look more threatening (Susskind et al., 2008; Sacco & Hugenberg, 2009; Kalat, 2011). Emotional expressions occur mostly in a social context, while intentional emotional expressions seldom exactly match spontaneous expressions. For instance, the smile of a truly happy person includes movements of the mouth muscles and the muscles surrounding the eyes. Voluntary smiles generally do not include the muscles around the eyes (Ekman & Davidson, 1993; Kalat 2011). The similarity of facial expressions across cultures implies that they are unlearned. Researchers interested in the hypothesis of a few basic emotions used photos of people showing facial expressions and proved that people in other cultures also identified them, though somewhat less accurately. Yet, most people identify expressions fairly accurately even when viewing faces from an unfamiliar culture (Ekman, 1992; Russell, 1994). Even so, people supplement facial information by noticing gestures, posture, context, tone of voice, even smell (Zhou & Chen, 2009) and as psychologists (i.e. Ekman, 2001; Kalat, 2011) agree, simply observing people more carefully (i.e. their micro expressions), may lead us to understand someone's emotional state.

Chen and Ayoko (2012) stress the importance of considering emotions in social sciences and human interactions. Barbalet (2004) states that the centrality of emotions to all significant social and human activities is now acknowledged, though, their discussion in such core activities is undeveloped. Others (i.e. Peslak, 2005; Tan et al*.,* 2005) argue that little research addresses the emotions felt and the emotional demands and dynamics involved in human interactions. Bulger (2013) requested more research on the emotional dimensions of people, based on the little attention which has been given, since these may impact on behaviours and attitudes that affect the well-being of people. Maguire and Geiger (2015) make reference to a gap in fully comprehending service consumption emotions. The relationship/significance of emotional dimensions with events and festivals is furthermore highlighted through the recent studies of Wood and Moss (2015) and Yan, Zhang and Li (2012) who call for further research in this regard. Brown and Hutton (2013) also call for an understanding of the psychosocial domain of events' audiences. All the same,

Kim, Boo and Kim (2013) found that even though the number of event studies has dramatically increased since 2000, the attention has still remained on a very limited number of topics; Their conclusion rests on a thorough review of 178 event-related articles collected from the *Annals of Tourism Research*, the *Journal of Travel Research* and *Tourism Management* published between 1980 and 2010. Mair and Whitford (2013) state that experts feel that there are several areas of events (such as logistics) that have been comprehensively researched and where further research is unlikely to provide any new information, and call for future events and festivals research from a social viewpoint.

Research approach

Considering the aforementioned, the aim of this study is to investigate the impact of events and festivities on visitors from a psychological (emotional) perspective. An ethnographic methodological approach was employed to address the research aim. The benefits of ethnography in terms of exploring and understanding event participants and their experiences are stressed in the study of Jaimangal-Jones (2014). Holloway, Brown and Shipway (2010), state that ethnography is advocated as an appropriate research approach to the events field which will lead to a more diverse literature on events, and will rebalance the current dominance of quantitative-based research papers. Mackellar (2013) suggests that ethnography can be used to gain a deeper understanding of social dynamics of audiences and the affective dimensions of their behaviour. The researcher adds that it is highly appropriate to the context of event environments, where the use of surveys can interrupt the flow of the event experience for audiences, or be made impossible by the structure of the event.

Ethnography is a prolonged research method in which the researcher attempts to understand social meanings in terms of what is meaningful to members of a social group and behaviour of people in a given setting, situation, or context, through regular observations, listening and conversations. (Bryman, 2004; Trace, 2007). It is used if research focus on the human side is desired (Damien 2006; Irvine & Gaffikin 2006; Saltmarsh, 2013; Muskat et al., 2013). Palmer (2005) suggests that the wealth of data generated and the level of detail from the participant observation cannot be created by either quantitative or qualitative questionnaires. Researchers undertake ethnographic studies to see the world from the point of view of those being researched (Veal, 1997; Henn, Weinstein & Foard, 2006). Participation in various events along with other attendees enabled Genzuk (2003) to feel what is like to be part of the group. Others (i.e. Sørensen, 2003; Salazar, 2005) note that its core interest is analytical, rather than statistical generalisation. McCabe (2007, p. 227) states that such approaches "offer something different, unique and liberating to scholars of touristic phenomena". In an attempt to gain insights into the travel culture of backpackers, Sørensen (2003) used an ethnographic approach. Others (i.e. Bowen, 2002; Bowie and Chang, 2005) adopted the same approach to evaluate tourist satisfaction. Nocker (2015) investigated English football fans through ethnographic techniques by travelling with them to events and observing their motivations and behaviour. Bowen (2002) called for the employment of such research in the investigation of other tourist behaviour, while others (i.e. Godfrey & Clarke, 2000; Bowen, 2001a; Crossan 2003; Henn, Weinstein & Foard 2006) agree that ethnographic techniques provide in-depth explorations of tourist behaviour and are useful in understanding the tourism experience.

This researcher adopted a combination of ethnographer roles. This combination enabled the researcher to be involved, participate, observe and at the same time steer/engage in conversations with attendees at several events, while avoiding the risk of a "going native" (Bryman, 2004) situation, or being completely detached from the participants. The blend of roles also allowed the researcher to get exposed to the same experiences as those under investigation. Inevitably the researcher in most cases had a "complete participant/covert role" since it was impossible to inform all participants about his status. Homan (1991) states that it is not practicable or possible to inform all ethnography participants. In this study, the researcher did not deliberately adopt a "covert role" since it would not have allowed the desired interaction with attendees (Bowen, 2001b; Bryman, 2004).

Participants with whom the researcher chatted were given the opportunity to refuse participation. Ethnographic ethical principles (i.e. ASA 1997 – Codes of Ethics and Social Research Association 2003) were followed (i.e. ensuring anonymity and keeping information about respondents/event holders confidential). The study excluded respondents who were not able to fully understand the nature of the study and the implications for them of participating in it.

The specific ethnographic study commenced in early 2006 and was completed, after almost a decade (early June 2015) once sufficient information to reach conclusions was gathered and new information was reinforcing what had already been collected. The researcher was not an ethnographer continuously through these years. As Bryman (2004, p. 307) states, "it is impossible to be an ethnographer all the time". Ethnographers need to take time out to write up notes, and attend to other commitments and body imperatives (eating, sleeping, and so on).

In this case, the researcher reported his own experiences (Canniford, 2005), as well as the observed behaviour and expressions of attendees at several events. These were supplemented with casual conversations with visitors. Researchers (i.e. Bryman, 2004; Othman, 2004) agree that an ethnographic approach, apart from participant observation (joining the members being study) and observational research (watching users), also includes contextual inquiry – asking questions in the natural setting (e.g. Fayard & van Maanen, 2015). Thus, several informal interviews/chats took place with a number of events' attendees. These were used to supplement the researcher's experiences and fieldwork observations. The researcher chose to employ open questions (as the study of McCabe, 2001) and conversations which assist in the emergence of the emotional dimensions of the visitors' experiences. Other studies (e.g. Kneafsey, 2001; Damien, 2006) have also combined informal interviews and participant observation as data collection methods.

The outcome of the study is not solely based on the ethnographer's personal experiences given that observations and informal conversations supplement fieldwork findings to ensure reliable conclusions. The inclusion of emotions

experienced by the researcher and respondents are, as Koning and Ooi (2013) stress, incredibly insightful and enhance the trustworthiness and quality of the study.

The researcher engaged in hundreds of casual conversations with event attendees/visitors – in total approximately 500 (precise number: 532) and followed a random selection rule so that bias did not affect the validity of observations (Mariampolski, 2006). Emphasis was placed on the suggestion of Kitto, Chesters and Grbich (2008, p. 243): "Methodological criteria of quantitative research – validity, reliability and empirical generalizability – are generally not directly applied to qualitative research ... Instead, terms such as *rigor* (thoroughness and appropriateness of the use of research methods), *credibility* (meaningful, well presented findings) and *relevance* (utility of findings) are used to judge the quality or 'trustworthiness' of a study…" In this study, the researcher noted his fieldwork experiences – after attending several events/festivities – and the findings from the conversations he had with respondents. Researchers (i.e. Sanders, 2002; Bryman, 2004; Trace, 2007) agree that the main recording equipment for ethnographers is a pen and a notepad to write field notes. The analysis of the findings begun while the data were being collected, by bringing order and organising the findings into general trends as a number of researchers suggest (i.e. Krueger, 1994; Beymon-Davis, 1997; Shaw, 1999; Damien, 2006; Trace, 2007). The most challenging task was to organise and analyse the fieldwork findings, attempting to find patterns and reach conclusions.

In regards to the study limitations, it was felt that some respondents experienced difficulties in expressing their feelings in what was for them a foreign language. Generally, the nature of the study, allowed a good rapport to be developed. Also, there were cases where certain respondents found it hard to express some personal emotions (e.g. embarrassment or frustration). Also, the study did not pinpoint any significant differences based on gender or other cultural/demographic criteria. Further research which may use a case studies-focus for specific countries/cultures may be able to do so. Although the study included various events held in several destinations, there is still the issue of the generalisation limitation involved; similar and additional investigations are strongly encouraged to further develop this relatively unexplored topic.

Findings

The findings revealed that generally positive emotions (e.g. contentedness, happiness or joy) were reported by all those who felt that the outcome of the event met or exceeded their personal expectations and aspirations (i.e. an advantageous team score), or promoted, as each participant perceived it, a pleasant "spirit", "aura" or "atmosphere" (e.g. a joyful folkloric dance show; a festive New Year's event). Even so, such emotions were not reported by those who did not value such events, or those who felt that a specific event was not well-organised, was over-rated through "deceitful" promotion, or was perceived as of "lesser value/ disadvantageous" compared to other similar events. An exception applies to those who were not necessarily fond of a particular event, yet acknowledged the positive outcomes on others – especially if these were close to them (i.e. their children). "Love" is a positive emotion which was mentioned the least by participants compared to other positive emotions. Apart from "fans" of famous personalities (e.g. a singer or football player), those who expressed "love" as an emotional outcome of their experience were those who in very isolated cases received from locals particular (mainly psychological) elements which they perceived as honest expressions of "love" (i.e. genuine hospitality, comfort and sympathy). In this regard, Lashley (2008) notes the importance of those guests' emotions which are stimulated by the hospitableness involved in the host-guest transaction. This was mainly reported by those who attended events in the countryside, or small urban areas, or stayed at particular destinations holding an event for many days (mostly more than three). Interestingly, people that expressed this particular emotion were more likely to find themselves bonded with certain locals and the region, and more likely to revisit it/them (i.e. visitors making reference to destination revisits even in different seasons). The findings thus give value to Wood and Moss's (2015) argument on the usefulness of emotional responses as a significant indicator of future behaviour.

"Enthusiasm" was observed, as well as reported at those events which the participants were greatly anticipating (i.e. a particular sporting event). Also, by those that were pleasantly surprised by something which they had little, or no expectations for (e.g. a fan who was given the opportunity to chat with a famous singer). Strong positive emotions, through enthusiastic verbal expressions and non-verbal clues (i.e. gestures and facial expressions), were also observed and communicated by those who experienced a "holistic agreeable" (for them) experience; This involved an overall satisfying "senses feeling" which covered sight, hearing, taste, touch and smell (e.g. a wine festival with nice natural/ artificial physical surroundings, music, the opportunity to socially interact with others, actively engage with fermentation-related equipment and tasting of wines/local specialties). A possible negative (even minor) distraction of any of these, seem to be able to impair the overall participants' experience (e.g. attendees making reference to unpleasant odors by a person sitting/standing close to them, or others stating how thirsty they felt on a hot day at a particular event). Yet, no conclusions can be drawn on whether people with impaired (e.g. visual) abilities are not able to express strong positive emotions at events (e.g. concerts). Destinations and organisers should therefore seek to "thrill the senses" by including such presentations, physical attributes and offerings that will enhance the overall experience of attendees and impact on their emotions favourably. A genuine hospitable/ comfort stance on behalf of the locals may also foster strong positive emotions. The "surprise" element should also be considered and offered, although its inclusion in the promotional process will definitely take away the unforeseen result and the associated outcomes, since it will be expected by the visitors.

Further fieldwork findings indicate that the impact on attendee's emotions of an event/festivity organised by a local community, for example, may impact on the perceived "image" that someone has even for the destination as a whole (region or country). For instance, if negative emotions are experienced (e.g. disappointment or frustration) then this, depending on the situation, will negatively influence the

perception that the attendee will have towards not only the event organisers, but also, towards the destination (e.g. that they lack organisation/ professionalism) and the locals (e.g. that they are inconsiderate towards their guests, or are largely profit-oriented). This leads, based on fieldwork findings, to the almost definite intention of a negative word-of-mouth report. However, successful organisation of an event may not necessary impact favourably on the emotions of all attendees, for various reasons. Apart from apparent external impacts (e.g. a storm on the day of an al-fresco event), one such reason may be that the specific event may not be valued by certain people, such as carnival festivities which may create emotions of "content" and "happiness" for some, and "frustration" (e.g. due to "carnivalesque" behaviour) for others. A festivity/event will have the same consequence if it is not perceived as pleasant by all attendees. For instance, a "gay pride" parade may create emotions and expressions of "joy" and "pride" for certain attendees, or even opposing feelings of "shame" for others. Also, a "dark" event/ festival in which perhaps any ritual associations or certain physical presentations (e.g. skeletons with nerves) may impact delightfully on the emotional state of a person highly interested in this type of thing, but create "disgust" in others. Although negative feelings (e.g. sadness) are experienced at particular events (e.g. dreadful historical presentations), attendees still communicate their intention to recommend these to others, as part of the overall experience visitors should have at a particular destination. Even so, the local authorities and organisers should be aware of the fact that in the case of an event "open to the public", the outcomes may not be as favourable as intended, especially if attendees happen to fall into certain specially sensitive groups.

Prior to an event, monetary cost can be found to restrict participation if the fee is perceived as high (not always – depending on the willingness of someone to attend the event), yet it is not taken into consideration once the experience is completed and the overall impact on the emotions is perceived by the attendee as positive, based on the respondent's comments. Yet, when certain negative feelings (e.g. "disappointment") were reported, the "price" element was often raised.

Specific seasonal celebrations/festivities and associated events, provided that they create strong positive emotions (e.g. "happiness" or "surprise") are found to be linked by attendees with the destination at that precise season (e.g. Christmas markets/events and the city of Vienna; Easter festivities and certain villages in the Cypriot countryside). This is further fostered by particular stimuli which attendees experience while at the destination (e.g. distinct images, smells, tastes or songs) and which they intentionally (or not, e.g. while browsing a photo album) come across them even years after their return home (e.g. respondents noticing specific smells that remind them of an experience they had at a particular destination). All those who expressed such emotions communicated their willingness to share the information with others, and the majority (nearly nine out of ten) viewed favourably a revisit at some point in the future. Yet, this study was not able to confirm the association between intention and actual behaviour. Even so, such seasonal events are subject to exogenous influences, some of which may be beyond the control of destinations but have an impact on the overall experience of visitors, especially if they value these specific events/festivities (e.g. an expectation that a Halloween-theme outdoor event is "complemented" by a frightful, grey autumn sky). Although such expectations were not anticipated by those in climatic environments in which particular festivities do not match "expected weather conditions" in the northern hemisphere (e.g. in Australia), attendees would regard this as a "plus" element in their overall experience, based on their perceived specific event-image created through the media, for example (e.g. snow at a Christmas market). Destinations are thus encouraged to promote/link such "seasonal" events – if possible – with specific regions while attempting to diversify their offerings, to avoid comparisons. This may be achieved by linking these events with local traditions and customs, practices and specific stimuli which, along with local memorabilia, may foster "re-living" such experiences once visitors (local or international) return home.

Negative emotions (e.g. sadness, disappointment or frustration) were reported by attendees whose expectations were not meant. This was extended to a "shocking" (unpleasant) experience when dreadful, or dramatic circumstances were experienced at a particular event (e.g. an accident). The ethnographer's personal experiences and observations also support this. Specific negative emotions such as "frustration" and "anger" were also found to be felt mainly towards other people (e.g. a respondent who got annoyed with another attendee, or towards the organisers or someone closely linked to them, such as, an employee). Depending how strongly the attendee felt about the incident, the emotion could even jeopardise the whole experience for them. Participants who expressed such negative emotions were found to be the most likely to complain/express their discontent – if possible orally, or mainly, via social media platforms. This reinforces the outcome of other studies (e.g. Tronvoll, 2011; Svari & Erling Olsen, 2012) that the negative emotion of "frustration" is the best predictor for complaint behaviour. Of note, however, is the fact that the emotion of "anger" was felt and expressed by those who attended specific events which were closely linked to certain occurrences (e.g. a sad, historical war representation). Once more this feeling of "anger" was found to be directed against others (e.g. those who originally facilitated in the process of torturing/killing people). Even so, such emotions were perceived by attendees as giving even more psychological value to their (specific) experience. Indeed, as Kalat (2011) notes, our emotions provide richness to our experiences.

In this context, "fear" is an emotion which can be categorised as positive or negative, depending on the circumstances. For instance, this emotion could be the result of unpleasant experiences at events perceived by attendees as threatening their safety or wellbeing (e.g. extremely crowded venues/places, risk of a terrorist attack or severe weather conditions). Yet, the same emotion could add to someone's overall experience, depending on the situation, with attendees reporting words such as "surprise", "excitement" and "enthusiasm" in the case of extreme fireworks, for example. Those that communicated the emotion of "embarrassment" also expressed their intention not to visit the same event, especially if held at the same location (approximately seven out of ten). Such emotions were the result of exogenous

(e.g. offensive behaviour by others), or self-related factors (e.g. someone falling from the stage in front of others). Perhaps more interesting is the fact that almost all those that felt "bored" at events not only communicated a non-revisit intention but also communicated their experience as an unpleasant one. Exceptions apply only in certain (e.g. sporting) events which "boredom" (e.g. due to a not challenging game) does not at all affect future intentions to attend similar events. Even so, in most cases it does negatively affect the overall experience at the particular event. Thus, whenever possible, it is highly suggested that destinations should seek ways to keep participants actively engaged and interested (e.g. by offering the "do", not only the "see"). Yet the task becomes more challenging if the events/festivities address a wide market.

Conclusion

Fieldwork findings reveal that a pleasant and joyful event/festival "spirit/aura" may impact favourably on the emotions of attendees, under certain circumstances. Strong positive emotions may be the outcome of unexpected elements, genuine hospitable offers and a holistic – without distractions – agreeable, sense fulfilling experience. Positive outcomes may even extend to the creation of strong bonds between visitors and hosts/destination. The enforcement of seasonal festivals at specific regions and the tangibilisation of the (event) experience with strong sense stimuli may lead to strong cognitive and emotional connections with a specific destination which will endure even for a lifetime. Even so, if a destination wishes to stage an event, then they must "do it properly – otherwise not do it at all" given that the damage will outweigh the positive outcomes. The negative impact of an event on someone's emotional state may impact adversely on the perception the attendee will have even towards the destination as a whole. Negative emotions such as "disappointment" and "frustration" will lead to negative publicity even towards the destination as a whole, also via social platforms. The unexpected findings of the study are that under certain circumstances certain negative emotions (e.g. "sadness", "fear" or "anger") may add psychological value to a specific experience. All the same, "frustration" may lead to a revisit intention, "embarrassment" though, probably not. Finally, "anger", "disappointment" and "frustration" may not have the same negative effect as "boredom" does. Letting attendees get bored probably has the worst impact on destinations staging/hosting events and festivities.

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Appendix 1: List of events attended (by date of occurrence)

Event/ Occasion	Exact location	Country	Date
Cultural theme show	Phuket Island	Thailand	Jan-06
Offerings ceremony	Bangkok	Thailand	Jan-06
Religious (funeral) ceremony	Phuket Island	Thailand	Jan-06
Religious event	Bangkok	Thailand	Jan-06
Float market	Outskirts of Bangkok	Thailand	Jan-06
"Green Monday" event	South island countryside	Cyprus	Feb-06
Easter festivities	Pitsillia villages	Cyprus	Apr-06
Folkloric dance show	Dublin	Ireland	May-06
Beer event	Dublin	Ireland	May-06
Open market	Covent Garden – London	UK	May-06
Halloween party	Larnaca	Cyprus	Oct-06
New Year's Eve festivities	Central London	U.K	Dec-06
Special meal event	Kalopanayiotis village	Cyprus	Aug-07
Traditional fair (Paniyiri)	Athienou village	Cyprus	Sep-07
Folkloric dances/music	Aradippou village	Cyprus	Oct-07
Halloween event	Larnaca	Cyprus	Oct-07
Dance/music event	Athens	Greece	Feb-08
Easter night festivities	Larnaca	Cyprus	Apr-08
Open food market	Salzburg	Austria	May-08
Music event	Salzburg	Austria	May-08
Water show/exhibition	Hellbrunn	Austria	May-08
Contemporary art exhibition	Salzburg	Austria	May-08
Musical event	London	UK	May-08
Cultural music event	Granada	Spain	Aug-08
Art exhibition	Toledo	Spain	Aug-08
Folkloric dance show	Seville	Spain	Aug-08
Bull-fight event	Madrid	Spain	Aug-08
Pride parade/night event	Stockholm	Sweden	Aug-08
Open ethnographic museum	Skansen	Sweden	Aug-08
Theme (Halloween) party	Larnaca	Cyprus	Oct-08
Graduation ceremony	Xanthi	Greece	Nov-08
Special meal event	Xanthi	Greece	Nov-08
Religious ceremony	Ayion Oros	Greece	Nov-08
Christmas festivities	Larnaca	Cyprus	Dec-08
Wedding occasion	Melbourne	Australia	Jul-09
Victoria Market	Melbourne	Australia	Jul-09
Sport (soccer) event	Melbourne	Australia	Jul-09
Medieval torture exhibition/reenactment	Ballarat	Australia	Jul-09
Open Museum	Sovereign Hill	Australia	Jul-09
"Christmas in July" occasion	Dandenong Mountains	Australia	Jul-09
Aquarium show	Sydney	Australia	Jul-09
Halloween party	Larnaca	Cyprus	Oct-09
Changing guard ceremony	Central London	UK	Nov-09
Christmas markets	Vienna Inner City	Austria	Dec-09
Concert	Vienna	Austria	Dec-09
Church mass	Vienna	Austria	Dec-09
Christmas Market	Schloss Schonbrunn	Austria	Dec-09
Carnival celebrations	Limassol	Cyprus	Feb-10
Easter traditional festivities	Pitsillia villages	Cyprus	Apr-10
Wedding occasion	Kastroria	Greece	Jul-10
Special meal event	Thessaloniki	Greece	Jul-10
Wine festival	Limassol	Cyprus	Aug-10
National day celebrations	Larnaca	Cyprus	Oct-10
Easter festivities	Pitsillia villages	Cyprus	Apr-11
Changing guard ceremony	Amalienburg Palace-Copenhagen	Denmark	Aug-11
Music event	Tivoli Gardens-Copenhagen	Denmark	Aug-11
Summer open park	Kobenhavn park	Denmark	Aug-11
National Day parade	Larnaca	Cyprus	Oct-11
Christmas market	Nicosia	Cyprus	Dec-11
New Year's Eve	Troodos	Cyprus	Dec-11
Easter festivities	Pitsillia villages	Cyprus	Apr-12
Easter market	Central square Prague	Czech Rep.	Apr-12
Medieval torture exhibition	Prague	Czech Rep.	Apr-12

Appendix 1: Continued

Event/ Occasion	Exact location	Country	Date
Jewish Cemetery/exhibition	Prague	Czech Rep.	Apr-12
Music rock event	Prague	Czech Rep.	Apr-12
Night event	Rome vicinity	Italy	Jul-12
Special meal occasion	Rome city center	Italy	Jul-12
Mini soccer occasion/market	Sant' Angelo area	Italy	Jul-12
Halloween event	Larnaca	Cyprus	Oct-12
Christmas festivities	Larnaca	Cyprus	Dec-12
National Day parade	Larnaca	Cyprus	Mar-13
Easter festivities	Larnaca	Cyprus	Apr-13
Soccer sport event	Ayios Konstantinos	Cyprus	Apr-13
Music event	Ayia Napa	Cyprus	Jun-13
Night music event	Central Budapest	Hungary	Jul-13
Fair	Budapest	Hungary	Jul-13
Open Sunday park	Budapest	Hungary	Jul-13
Open arts/crafts market	Bratislava city Hall area	Slovakia	Jul-13
Traditional fair (Paniyiri)	Aradippou area	Cyprus	Sep-13
National Day celebrations	Larnaca	Cyprus	Oct-13
Christmas festivities	Larnaca	Cyprus	Dec-13
Carnival festival& parade	Limassol	Cyprus	Feb-14
Flower market/fair	Amsterdam city center	Netherlands	Feb-14
Red light district	Amsterdam city center	Netherlands	Feb-14
Carnival festival& parade	Torres-Vedras	Portugal	Feb-14
Beach volley sport event	Larnaca	Cyprus	Jun-14
Traditional fair (Paniyiri)	Athienou village	Cyprus	Sep-14
Cultural event (Palouzes)	Agios Konstantinos village	Cyprus	Oct-14
Music/dance event	Gianitsa outskirts	Greece	Nov-14
European cultural event	Kria Vrisi	Greece	Nov-14
Christmas festivities	Larnaca	Cyprus	Dec-14
Dance (bouzoukia) event	Athens	Greece	Feb-15
"Green Monday" occasion	Athens	Greece	Feb-15
Ballet dancing show	Larnaca	Cyprus	May-15
Beach tennis event	Larnaca	Cyprus	Jun-15
Traditional wedding	Ayios Konstantinos village	Cyprus	Jun-15
European cultural event	Prague	Czech Rep.	Jun-15

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Consumer patronage and willingness-to-pay at different levels of restaurant attributes: A study from Kenya

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This study investigates the effect of three key restaurant attributes – food quality, service quality and ambiance – on consumers' (i) willingness-to-pay (WTP) and (ii) intentions to patronage (ITP) for limited service and upscale restaurants in Kenya. A full-profile 2 (types of restaurants) × 2 (levels of attributes) × 3 (service attributes) factorial design was developed in which type of restaurant (upscale dining and limited service) was varied as a between-subjects factor, and the variations in the attributes and levels a within-subject factor. Findings indicate that food quality is the only attribute to have a positive relationship with both consumer patronage and willingness-to-pay, in high-end as well as limited service restaurants. Service quality and ambiance both have an effect on consumer intentions in upscale dining, but not in a limited service restaurant. Moreover, an interaction effect was found. In high-end restaurants, and not so in limited service restaurants, increase in ambience was found to increase patronage and willingness-to-pay by a significant amount if service quality was also increased. The study extends previous work on the nature of restaurant attributes, as it (1) examines consumer preferences in a developing country, and (2) shows how attributes interact and affect ITP and WTP differently in a limited service and high-end restaurant context.

Keywords: attributes; consumer behavior; willingness to pay; consumer patronage; price

Introduction

One of the most important issues in consumer research is the determination of consumer preferences and wants so that marketers can adapt or generate new products accordingly (Griffin & Hauser, 1993; Verma, Thompson & Louviere, 1999; Bujisic, Hutchinson & Parsa, 2014). This implies that managers need insight into the profitable attributes that should be considered in making investment and strategic decisions. For example, restaurants may be obliged to invest in attributes such as ambiance in order to remain competitive and profitable in the marketplace. If managers elect to invest in a specific attribute, it is important for them to understand the long-term implication in relation to profitability and return on investment (ROI).

There is a vast literature on consumers' preferences for services, including studies on restaurant attributes (e.g. Perutkova and Parsa, 2010; Bujisic et al., 2014; Harrington, Ottenbacher & Kendall, 2011; Choi & Zhao, 2010; Kim, Raab & Bergman, 2010; Njite, Dunn & Kim, 2008; Knutson, Beck & Elsworth, 2006; Moschis, Curasi, & Bellenger, 2003), but with little attention for consumer preferences in non-western countries (e.g. Dutta et al., 2014; Khan & Oyewole, 2014; Upadhyay, Singh & Sharma, 2009; Lord, Putrevu & Shi Yi, 2005; Bhuian, 2000). Moreover, work focusing on the financial implications of consumer preferences is virtually non-existent, with the exception of Andersson (1991) and Dutta et al. (2014), who assess willingness-to-pay (WTP). Understanding WTP is of particular interest in studying consumer prerferences as it is rich in individual information. The ability to measure WTP enables managers to estimate demand and maximise revenue through price optimisation.

This study therefore investigates the effect of key restaurant attributes – specifically food quality, service quality and ambiance – on consumers' (1) willingness-to-pay (WTP) and (2) intentions to patronise (ITP). It focuses on restaurants in Kenya and differentiates between limited service and high-end restaurants, thereby, significantly extending previous work that has examined consumer behavioural intentions in other parts of the world (e.g., Bujisic et al., 2014; Dutta et al., 2014).

Literature review

Utility theories such as multi-attribute theory (MAUT) and subjective expected utility theory (SEUT) suggest that products (goods and services) comprise of several attributes that influence consumer purchase and consumer evaluation of the product. As Mittal, Kumar and Tsiros (1999) suggest, consumers are likely to evaluate their satisfaction with a product at the attribute level rather than at the product level as a whole.

Restaurants possess several attributes and extant literature reveals that food quality level, service levels and the ambiance are the most important attributes of customers' restaurant dining experience (e.g. Bitner, 1992; Dabholkar, Shepherd & Thorpe, 2000; Kim, Ng & Kim, 2009; DiPietro, Parsa & Gregory, 2011; Dutta et al., 2014). Moreover, these attributes were reported as significantly correlated with consumer behavioural intentions ITP and WTP (DiPietro et al., 2011).

Food quality

Namkung and Jang (2007) investigated the significance of food quality in relation to customer satisfaction and behavioural intentions in mid- to upscale restaurants. Their findings revealed that, overall, food quality significantly influenced consumer satisfaction and behavioural intentions. A further analysis of their results revealed that taste and presentation were the two most important contributing aspects of food quality that enhanced consumer satisfaction with the food. Similarly, Min and Min (2011) examined service quality and customer satisfaction in fast food restaurant franchises in the USA. The results of their study revealed that the taste of the food was the most important restaurant attribute in fast food restaurant customers' perceptions and eventual satisfaction.

These studies indicate that there is a positive and significant relationship between food quality and consumers' behavioural intentions (DiPietro et al., 2011). That is, the higher the food quality, the higher the consumer satisfaction with the product and the more likely the consumer is expected to engage in a certain positive behavioural intentions. Given the reported importance of the food attribute for consumers of both limited service and high-end restaurants, it is formulated that:

- H_1: The relationship between food quality and consumer behavioural intentions is independent of the type of restaurant.
- H_{1a}: In the case of both high-end and limited service restaurants, there is a positive relationship between food quality and consumers' intention to patronise (ITP) a restaurant.
- H_{1b}: In case of both high-end and limited service restaurants, there is a positive relationship between food quality and consumers' willingness-to-pay (WTP).

Service quality

Service quality is perhaps one of the most examined constructs in the marketing literature. Kara, Kaynak and Kucukemiroglu (1995) investigated customer perception of fast food restaurants service quality in the United States and Canada using eleven attributes and concluded that service quality is significant to consumer behavioural intention. The work of Stevens, Knutson and Patton (1995), John and Tyas (1996), Qin and Prybutok (2008) and Qin, Prybutok and Zhao (2010) reveal that service quality is based on both tangible and intangible aspects of a product.

Overall, the extant literature seems to indicate that there is a relationship between service quality and customer satisfaction. Customers of limited service restaurants are mainly concerned with the limited aspects of service quality such as convenience, order accuracy and speed of service (Clark & Wood, 1998; DiPietro et al., 2011). Service level, however, is one of the most important factors that customers expect from an upscale dining establishment (Tlapa et al., 2011). In case of upscale dining, customers not only expect to meet or exceed all service quality dimensions, but also expect to receive excellent personalised service delivery and a "VIP-like" treatment.

Personalisation of service is of great strategic significance and businesses invest in personalisation and information processes and acquisition capabilities in order to develop and manage various customer retention strategies (Winer, 2001). Personalisation of service serves the distinct purpose of increasing customer loyalty and also serves as a deterrent to switching (Alba et al., 1997). Personalisation has exclusively been employed by businesses in the luxury goods and services sector where it often signals high quality with implicit price premiums for personalised products or services (Mattila, 1999). Other instances where personalisation can be observed are when consumer-service provider relationships are strong and repetitive, for example at those high-end restaurants where customers are greeted by their names and niceties are exchanged between the customers and service provider. Therefore, it is reasonable to propose that personalised service is positively related to behavioural intentions of consumers of high-end restaurants. Thus, the following hypotheses are formulated:

- H_2: The relationship between service quality and consumers' behavioural intentions is moderated by the type of restaurant based on the service levels offered.
- H_{2a}: In high-end restaurants, there is a positive relationship between service quality and intention to patronise (ITP).
- H_{2b}: In high-end restaurants, there is a positive relationship between service quality and consumers' willingness-to-pay (WTP).

Even though some of the aforementioned studies have showed that there is a relationship among service quality and consumer intentions, the extant literature reviewed does not establish nor provide concrete premises to make conclusions about the relationship between these variables in the limited service industry. It is therefore reasonable to argue that even though there is a relationship, its direction and strength cannot be easily deduced. The following hypotheses are therefore presented:

- H_{2c}: In limited service restaurants, there is a positive but nonsignificant relationship between service quality and consumers' willingness-to-pay (WTP).
- H_{2d}: In limited service restaurants, there is a positive but nonsignificant relationship between service quality and consumers' intention to patronise (ITP).

Ambiance

Unlike the consumers of tangible goods, consumers of services have a limited number of cues to evaluate their satisfaction. Therefore, consumers utilise several peripheral cues besides the core product in making their decisions. In many cases, the physical environment provides a tangible cue for evaluating the service product. In this way, physical environment can be perceived as an important element in evaluating and determining consumer satisfaction with the service provided (Booms & Bitner, 1982).

Indeed, the influence of the physical environment on behaviour and image formation is very apparent in predominantly service oriented businesses such as hotels and restaurants (Baker, 1987; Booms & Bitner, 1982; Upah & Fulton, 1985). Due to the inseparability of services, particularly

in restaurants, consumers have to be present in the physical environment to consume and experience the product. Due to this simultaneity, Bitner (1992) suggests that the premises or place of consumption cannot be hidden and plays a significant role in the consumer's overall perception of satisfaction and behavioural intentions.

According to Berry and Clark (1986), consumers commonly seek cues to a business's capability before, during and after the service encounter, and physical environment provides such cues (Rapoport, 1982). Environmental psychologists suggest that atmosphere, interior design, lighting, noise/music levels and types, and layout are crucial dimensions of the restaurant ambiance that influence consumer perception, satisfaction and behaviour (e.g. Kim et al., 2009; Wall & Berry, 2007). Some positive outcomes of a customer approach to the environment include: affiliation, staying longer, commitment, and carrying out the purpose of being at the business (Mehrabian & Russel, 1974).

Since customers of high-end restaurants tend to spend extended time in a built environment while dining out, the quality (atmosphere) of the built environment will be important to them. Conversely, since customers of limited service restaurants focus on speed of service, order accuracy, menu simplification and convenience, the high quality of the built environment will have lesser importance for their overall satisfaction. Thus, the following hypotheses are formulated:

- H_3: The type of restaurant moderates the relationship between ambiance and consumer behavioural intentions.
- H_{3a}: In high-end restaurants, there is a positive relationship between ambiance and consumers' intention to patronise (ITP).
- H_{3b}: In high-end restaurants, there is a positive relationship between ambiance and consumers' willingness-to-pay (WTP).
- H_{3c}: In limited service restaurants, there is a positive but nonsignificant relationship between ambiance and consumers' willingness-to-pay (WTP).
- H_{3d}: In limited service restaurants, there is a positive but nonsignificant relationship between ambiance and consumers' intention to patronise (ITP).

Methods

Participants

The participants analysed in this study consisted of a total of 294 respondents from the city of Nairobi, Kenya, with 141 responding to high-end restaurant scenarios and 153 responding to limited service restaurants. The sample consisted of 61% female and 32% males, ranging in age from 19 to 72. Due to the nature of restaurant types (upscale restaurants and limited service restaurants), two distinctive groups of participants were mandated. The first consisted of target people that had visited and paid for their meals at a high-end restaurant within the past month. Respondents that did not meet this eligibility were excluded from the study. For high-end restaurant scenarios, the respondents were selected randomly by an intercept method at a major retail shopping centre by trained researchers. By choosing every third retail customer, we were able to ensure randomisation and improve chances of generalisability to the greater population. The second group consisted of students at a large branch campus of one of the largest universities in Kenya located in Nairobi. This group of respondents (students) was identified as a good representative of consumers for limited service restaurants thus aiding in generalisability. According to the National Restaurant Association (2010) in USA, respondents between the ages of 18 and 24 are often considered as the prime users of limited service restaurants, thus, providing support for our choice of respondents for investigating quick service segment of the restaurant industry. Respondents for limited service restaurants were full-time students and the average age for the student respondents was 23 years. A majority of these student respondents indicated that they visit limited service restaurants at least twice a week.

Attributes

Three restaurant attributes were investigated: food quality, service quality, and ambiance (DiPietro et al., 2011). With regard to service quality, personalised service was selected for the purpose of this study. Personalisation refers to the tailoring of products and purchase experience to the tastes of individual consumers based upon their personal and preference information (Alba et al., 1997). For the high-end restaurants, attribute levels ranged from average food, average service, and average ambiance (atmosphere) on the low end, to excellent food, excellent service, and excellent ambiance (atmosphere) on the high end. The scenarios for limited service restaurants required patrons to make choices ranging from low food quality, non-personalised service, and less appealing place on the lower end of criteria, to good food, personalised service, and appealing place on the high end of the criteria.

Design

The participants were presented with several scenarios and were asked to consider and make a choice among the eight restaurant options with two levels (e.g. excellent and low) of three service attributes (food quality, service quality, and ambiance). It was a full profile factorial design with 2 (types of restaurants) × 2 (levels of attributes) × 3 (service attributes). Thus, all possible combinations of attributes were presented as different restaurant options to the respondents. Each restaurant option featured either a "high" or "low" service level, "high" or "low" atmosphere or "high" or "low" food quality.

The type of restaurant (limited service/high-end) was varied as a between-subjects factor. Nested in a type, every respondent judged either a limited service or high-end restaurant but not both. The variations in the type of restaurants comprised a within-subject factor. Due to the distinct differences and characteristics of these two restaurant types, it was felt that it would be conceptually easier and more possible for consumers/respondents to solely identify a single restaurant type, and, therefore, easier for the manipulation and communication.

Independent and dependent variables

The three restaurant attributes, food quality, service quality and ambiance, were manipulated as the independent variables. Criticality of the restaurant encounter was applied to ensure that respondents focused and identified the restaurant type and the context. This criticality was manipulated as a between-subject factor. For each restaurant type, the respondents read

a short scenario describing the conditions under which each restaurant type was being selected. The scenarios described conditions that were either high or low in terms of criticality, thus, describing greater or lesser outcomes visiting these restaurants.

Two dependent variables, indicating the consumer behavioural intentions intent to patronise (ITP) and willingness-to-pay (WTP), were examined. ITP and WTP were examined in both limited service and high-end restaurants. Intention to patronise (ITP) was conceptualised as the future action of the consumer to purchase the product, visit the restaurant or recommend the restaurant to friends, relatives and colleagues. It was measured on a seven-point Likert scale by asking participants the likelihood of selecting a restaurant for their visit. WTP was examined with Kenyan Shillings (KSh.) currency using a price range that was determined appropriate from a pretest and multiple discussions held with local restaurant owners. It was defined as the reservation price, the maximum price a given consumer willing to pay for a product or service (Davenport, 1902; Jennings & Jennings, 2000). The high and low end of price points for both upscale restaurant and quick service restaurants were determined in the pre-test stage with over 64 students.

Participants for the high-end restaurants were asked to choose amounts they were willing to pay while dining out, ranging from KSh. 1 500 (US$18.75) to KSh. 2 000 (US$25), with an average of about Ksh $1 750 (US$ 22) at the high-end, and KSh. 500 (US$6.25) to KSh.700 (US$8.75), with an average of about Ksh 600 (US$ 7.50) at the low end (Appendix A). Limited service restaurant participants were given a different range of price amounts and they were asked to indicate how much they would be likely to pay for eating at low-end restaurants. There were several possible ranges of amounts, with the lowest being KSh.70 (US $0.85) to KSh.100 (US $1.25) with an average of about Ksh 85 (US$ 1.05), and the highest range being KSh.150 (US$1.90) to KSh. 200 (US$. 2.50) with an average of about Ksh 175 (US$2.20). The exchange rate at the time of data collection was about US$1 = KSh. 80.

Results and findings

Hypotheses H_1, H_{1a} and H_{1b} stated that the relationship between *food quality* and intent to patronise (ITP) as well as willingness-to-pay (WTP) is positive and independent of type of restaurant. The first observation was that of the overall *F*-test (overall for ITP and WTP), with a main interest in the Wilks' lambda (λ) statistic and the *F*-value associated with it (See Table 1). The one-way MANOVA revealed a significant multivariate main effect for food quality, Wilks' $\lambda = 0.853$, $F(2, 289) = 24.863$, $p < 0.001$, $\eta_p^2 = 0.147$ (power = 1.000), showing a statistically large ($\eta_p^2 > 0.14$, Cohen, Cohen, West & Aiken, 2003) main effect of food quality on the dependent variables ITP and WTP together.

Having obtained a significant multivariate main effect for all the factors, a univariate *F*-test (examining between-subjects effects) was conducted on each of the dependent variables to establish if food quality and restaurant type had a significant influence on ITP and WTP separately. At this point, since we were conducting four tests, the experiment-wise alpha rate of 0.05 was divided by four to obtain an acceptable confidence level for each of the four tests, so we set the alpha level to $p < 0.0125$. By that criterion, again, all results obtained for the univariate tests were significant for the effect of food quality on ITP ($F(2, 57) = 24.86$, $p < 0.0125$) and WTP ($F(2, 57) = 34.13$, $p < 0.000$).

MANOVA results were analysed for any interaction. The results revealed that the interaction between restaurant type and food quality was non-significant (Wilks' $\lambda = 0.898$, $F(2, 289) = 0.366$, $p = 0.588$, $\eta_p^2 = 0.102$ (power = 1.000)), showing that the interaction effect of restaurant level and food quality on the behavioural intentions ITP and WTP was non-significant. Thus, restaurant type did not moderate the influence of food on consumer behavioural intention (Table 1). Therefore, hypothesis H_1 was supported as there was no statistically significant moderating influence of restaurant type (limited service or high-end) on the relationship between food quality and the intent to patronise (ITP) and willingness-to-pay (WTP).

Table 1: Multivariate tests for food quality, restaurant types and dependent variables

Effect	Value	*F*	Hypothesis df	Error df	Sig.	Partial eta squared	Observed power
Intercept							
Pillai's trace	0.913	1512.916	2.000	289.000	0.000	0.913	1.000
Wilks' lambda	0.087	1512.916	2.000	289.000	0.000	0.913	1.000
Hotelling-Lawley trace	10.470	1512.916	2.000	289.000	0.000	0.913	1.000
Roy's largest root	10.470	1512.916	2.000	289.000	0.000	0.913	1.000
Restaurant level							
Pillai's trace	0.849	814.076	2.000	289.000	0.000	0.849	1.000
Wilks' lambda	0.151	814.076	2.000	289.000	0.000	0.849	1.000
Hotelling-Lawley trace	5.634	814.076	2.000	289.000	0.000	0.849	1.000
Roy's largest root	5.634	814.076	2.000	289.000	0.000	0.849	1.000
Food quality							
Pillai's trace	0.147	24.863	2.000	289.000	0.000	0.147	1.000
Wilks' lambda	0.853	24.863	2.000	289.000	0.000	0.147	1.000
Hotelling-Lawley trace	0.172	24.863	2.000	289.000	0.000	0.147	1.000
Roy's largest root	0.172	24.863	2.000	289.000	0.000	0.147	1.000
Restaurant level * Food quality							
Pillai's trace	0.102	0.386	2.000	289.000	0.601	0.102	1.000
Wilks' lambda	0.898	0.366	2.000	289.000	0.588	0.102	1.000
Hotelling-Lawley trace	0.113	0.371	2.000	289.000	0.590	0.102	1.000
Roy's largest root	0.113	0.386	2.000	289.000	0.651	0.102	1.000

A *t*-test was conducted to examine the difference in the consumer willingness to pay when food was varied from low to high. The results of this *t*-test revealed that in high-end restaurants when food quality was low, the consumer willingness to pay was ($\bar{x}_{WTP}$ = 1400) and when food quality was high, it was ($\bar{x}_{WTP}$ = 1650), representing a 17.9% change. Also, in the case of limited service restaurants, when food quality was low, the willingness to pay was (= 130) and when food quality was high ($\bar{x}_{WTP}$ = 155), a 19.2% change. There was no statistical difference (t (139) = 1.23, $p > 0.05$) in the WTP when food quality increased in the limited service restaurants.

Therefore, analysing the means of consumer behavioural intention in both restaurants types when food quality was varied from low to high (Table 2, and Figures 1 and 2), revealed a positive relationship between food quality and consumer intentions but it was not significantly moderated by the type of restaurant. Thus, support was found for hypotheses H_{1a} and H_{1b}.

Hypothesis H_2 stated that the type of restaurant moderates the relationship between service quality and intent to patronise (ITP) as well as willingness-to-pay (WTP). In high-end restaurants this relationship was posited as being significantly positive (H_{2a} and H_{2b}), whilst for limited service restaurants it was considered positive but nonsignificant (H_{2c} and H_{2d}). One-way MANOVA analysis revealed a significant multivariate main effect for service quality, Wilks' $\lambda = 0.648$, F (2, 289) = 78.158, $p <$ .001, $\eta_p^2 = 0.352$ (power = 1.000), showing a large main effect of service quality on ITP as well as WTP (see Table 3). Other associated statistics (Table 3) further supported the main effect for quality of service on behavioural intention.

Further examining the MANOVA table it was found that the interaction between restaurant type and service quality was significant, Wilks' $\lambda = 0.767$, F (2, 289) = 43.996, $p < 0.001$, $\eta_p^2 = 0.233$ (power = 1.000), showing that restaurant type (limited service and high-end) moderated the influence of service quality on consumer behavioural intention (Table 3). Thus, hypothesis H_2 is supported as restaurant type significantly moderates the relationship between service quality and the intent to patronise (ITP) and willingness-to-pay (WTP).

To further test this relationship (H_{2a}, H_{2b}, H_{2c} and H_{2d}), the means of the respondents were examined (Table 4 and Figures 3 and 4). The posited $H_{2a/b}$ states that in high-end restaurants there is a positive and significant relationship between service quality and consumer intentions. That means, when the levels of service are raised (e.g. personalisation of service and attention to detail) in high-end restaurants from low to high, the intent to patronise (ITP) and willingness-to-pay (WTP) also increase. A post priori *t*-test was conducted to examine the difference in the consumer willingness to pay when service was varied from low to high. The results revealed that in the high-end restaurant when service quality was low, the consumer willingness to pay was ($\bar{x}_{WTP}$ = 1 028) and when service quality was raised to high then it was ($\bar{x}_{WTP}$ = 1 515) with a *t*-value of t (140) = 4.43, $p < 0.001$. Thus, there was a statistically significant difference in the consumer WTP when service was varied from low to high value (47% change). Similarly, a *t*-test was conducted to examine the influence of varying service on consumer's intention to patronise the high-end restaurants. The results of the *t*-test revealed that when the level of service personalisation improved the ITP also increased ($\bar{x}_{ITP}$ = 3.44) to ($\bar{x}_{ITP}$ = 5.87), a 70% change, with a *t*-value of t (141) = 4.6, $p < 0.000$. Thus, H_{2a} and H_{2b} are supported since there is a positive and significant relationship between service quality and intent to patronise and willingness-to-pay in high-end restaurants.

For limited service restaurants ($H_{2c/d}$) a positive but nonsignificant relationship was posited between service quality and consumer ITP and WTP. In limited service restaurants, the results revealed that

Table 2: Estimated marginal means for willingness-to-pay (WTP) and intention to patronise (ITP) – Food quality

Restaurant type	Food quality level	Intention to patronise (mean)	% change	Willingness-to-pay (mean)	% change
Limited service	Low food quality	4.43	33.4	130	19.2
	High food quality	5.91		155	
High-end	Low food quality	4.03	31.0	1400	17.9
	High food quality	5.28		1650	

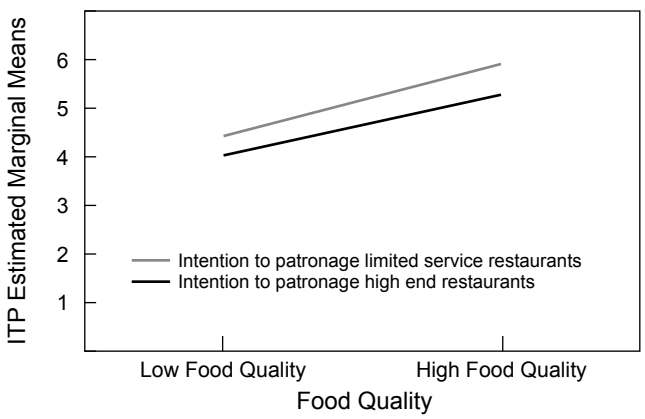

Figure 1: Estimated Marginal Means for ITP for Food Quality

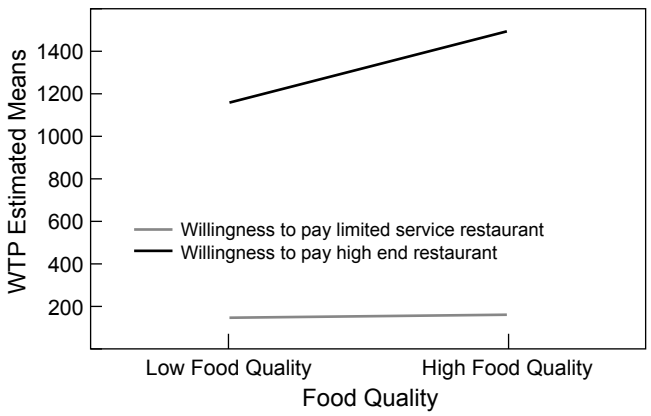

Figure 2: Estimated marginal means for WTP for food quality

when service quality was low, the mean value for willingness to pay was ($\bar{x}_{WTP} = 151$) and when service was high quality the WTP was ($\bar{x}_{WTP} = 180$). The *t*-test revealed (t (152) = 1.72, $p < 0.05$) that there was no statistically significant difference in the WTP if service quality was increased from low to high in limited service restaurants, thus hypothesis $H2_C$ was supported.

A *t*-test was further conducted to examine the influence of varying service on consumer's intention to patronise (ITP) limited service restaurants. The results of the *t*-test revealed that when the level of service personalisation increased the ITP increased from ($\bar{x}_{ITP} = 4.11$) to ($\bar{x}_{ITP} = 5.52$), a 34% change, with a *t*-value t (141) = 3.22, $p < 0.05$. This indicates that improvement in service does increase consumers' intention to patronise. Thus, the hypothesised nonsignificant relationship, $H_{2d,}$ between ITP and service quality in limited service restaurants was not supported.

Hypothesis H_3 described the relationship between ambiance and consumer intention, moderated by type of restaurant. The one-way MANOVA analysis revealed a significant main effect for ambiance (Table 5) showing a large main effect of ambiance on ITP and WTP together. Other statistics observed were Pillai's trace = 0.374, $F(2, 289) = 14.896$, $p <. 001$, $\eta_p^2 = 0.154$, and

Table 3: Multivariate tests for service quality, restaurant types and dependent variables

Effect	Value	*F*	Hypothesis df	Error df	Sig.	Partial Eta Squared	Observed Power
Intercept							
Pillai's trace	0.939	2208.051	2.000	289.000	0.000	0.939	1.000
Wilks' lambda	0.061	2208.051	2.000	289.000	0.000	0.939	1.000
Hotelling-Lawley trace	15.281	2208.051	2.000	289.000	0.000	0.939	1.000
Roy's largest root	15.281	2208.051	2.000	289.000	0.000	0.939	1.000
Restaurant levels							
Pillai's trace	0.867	940.883	2.000	289.000	0.000	0.867	1.000
Wilks' lambda	0.133	940.883	2.000	289.000	0.000	0.867	1.000
Hotelling-Lawley trace	6.511	940.883	2.000	289.000	0.000	0.867	1.000
Roy's largest root	6.511	940.883	2.000	289.000	0.000	0.867	1.000
Service levels							
Pillai's trace	0.352	78.518	2.000	289.000	0.000	0.352	1.000
Wilks' lambda	0.648	78.518	2.000	289.000	0.000	0.352	1.000
Hotelling-Lawley trace	0.543	78.518	2.000	289.000	0.000	0.352	1.000
Roy's largest root	0.543	78.518	2.000	289.000	0.000	0.352	1.000
Restaurant level * Service level							
Pillai's trace	0.233	43.996	2.000	289.000	0.000	0.233	1.000
Wilks' lambda	0.767	43.996	2.000	289.000	0.000	0.233	1.000
Hotelling-Lawley trace	0.304	43.996	2.000	289.000	0.000	0.233	1.000
Roy's largest root	0.304	43.996	2.000	289.000	0.000	0.233	1.000

Table 4: Estimated marginal means for willingness-to-pay (WTP) and intention to patronise (ITP) – Service quality

Restaurant type	Service quality level	Intention to patronise (mean)	% change	Willingness-to-pay (mean)	% change
Limited service	Low service quality	4.11	34.3	151	19.2
	High service quality	5.52		180	
High-end	Low service quality	3.44	70.6	1028	47.4
	High service quality	5.87		1515	

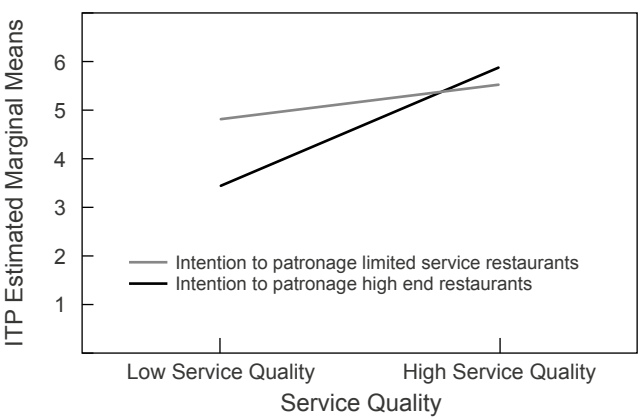

Figure 3: Estimated marginal means for ITP for service quality

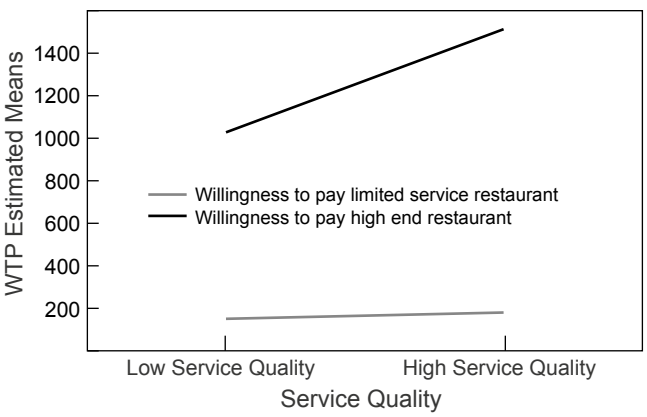

Figure 4: Estimated marginal means for WTP for service quality

Hotelling-Lawley trace = 0.172, $F(2, 289) = 14.896$, $p < 0.001$, $\eta_p^2 = 0.154$, providing further support for hypothesis H_3.

The results also revealed that the interaction between restaurant type and ambiance was significant (Table 6), indicating that the restaurant type moderated the influence of ambiance on intent to patronise and willingness-to-pay (Table 6). These findings provide support for hypothesis H_3, indicating that there is a statistically significant moderating influence of type of restaurant on the relationship between ambiance and consumers' intention.

Hypotheses $H_{3a/b}$ stated that in high-end restaurants a positive and significant relationship exists between ambiance and consumer intentions. Thus, when the ambiance levels of the built environment are varied from low to high, ITP and WTP are expected to increase. The *t*-test was conducted to examine the difference in the consumer willingness to pay when ambiance was varied from low to high. The results of this *t*-test revealed that in high-end restaurants when ambience was low, the consumer willingness to pay was ($\bar{x}_{WTP} = 1\ 180$) and when ambience was improved to high quality then the WTP was ($\bar{x}_{WTP} = 1\ 522$) with a *t*-value of $t\ (141) = 6.22$, $p < 0.000$. Thus, a statistically significant difference in consumer WTP was observed when ambience was improved from low to high (29% change).

Similarly, a *t*-test was conducted to examine the influence of varying ambience on the consumer's intention to patronise high-end restaurants. The results of the *t*-test revealed that when the level of ambience increased the ITP has increased from ($\bar{x}_{ITP} = 3.97$) to ($\bar{x}_{ITP} = 5.36$) with a *t*-value of $t\ (141) = 4.31$, $p < 0.001$, representing a 35% change (Figure 6). Thus, hypotheses $H3_a$ and $H3_b$ were supported.

Hypothesis $H_{3c/d}$ stated that in limited service restaurants there is a positive but nonsignificant relationship between ambiance and willingness-to-pay (WTP) and intent to patronise (ITP). In limited service restaurants, when ambience quality was low, the willingness to pay was ($\bar{x}_{WTP} = 138$) and when ambience was high the WTP was ($\bar{x}_{WTP} = 145$) with a *t*-value of $t\ (151) = 1.72$, $p = 0.057$. These findings showed no statistically significant difference in the WTP if ambience improved from low to high in limited service restaurants. Thus, hypothesis $H3_C$ was supported.

A *t*-test was further conducted to examine the influence of varying ambience on consumers' intention to patronise (ITP) limited service restaurants. The results of the *t*-test revealed that when the level of ambience increased from low to high the ITP increased from ($\bar{x}_{ITP} = 4.31$) to ($\bar{x}_{ITP} = 5.34$) with a *t*-value of $t\ (141) = 2.22$, $p < 0.05$, representing a 24% change. These results revealed that increase in ambience significantly increases the willingness to patronise, thus the hypothesis $H3_d$ was not supported. This clearly indicates that even in limited service restaurants consumers care for quality in ambiance and the relationship is positive similar to the high-end restaurants. This observation can be supported by the fact that most limited service restaurants often tend to remodel their restaurants periodically meeting the changing needs of the customer.

Table 5: Multivariate tests for ambiance, restaurant types and dependent variables

Effect	Value	*F*	Hypothesis df	Error df	Sig.	Partial Eta Squared	Observed Power
Intercept							
Pillai's trace	0.913	1524.565	2.000	289.000	0.000	0.913	1.000
Wilks' lambda	0.087	1524.565	2.000	289.000	0.000	0.913	1.000
Hotelling-Lawley trace	10.551	1524.565	2.000	289.000	0.000	0.913	1.000
Roy's largest root	10.551	1524.565	2.000	289.000	0.000	0.913	1.000
Restaurant type/level							
Pillai's trace	0.848	808.432	2.000	289.000	0.000	0.468	1.000
Wilks' lambda	0.152	808.432	2.000	289.000	0.000	0.468	1.000
Hotelling-Lawley trace	5.595	808.43	2.000	289.000	0.000	0.468	1.000
Roy's largest root	5.595	808.432	2.000	289.000	0.000	0.468	1.000
Ambiance level							
Pillai's trace	0.374	14.896	2.000	289.000	0.000	0.154	1.000
Wilks' lambda	0.651	15.978	2.000	289.000	0.000	0.154	1.000
Hotelling-Lawley trace	0.172	14.896	2.000	289.000	0.000	0.154	1.000
Roy's largest root	0.168	14.935	2.000	289.000	0.000	0.154	1.000
Restaurant level * Ambiance level							
Pillai's trace	0.078	12.231	2.000	289.000	0.000	0.078	0.996
Wilks' lambda	0.922	12.231	2.000	289.000	0.000	0.078	0.996
Hotelling-Lawley trace	0.085	12.231	2.000	289.000	0.000	0.078	0.996
Roy's largest root	0.085	12.231	2.000	289.000	0.000	0.078	0.996

Table 6: Estimated marginal means for willingness-to-pay (WTP) and intention to patronise (ITP) – Ambiance

Restaurant type	Ambiance quality level	Intention to patronise (mean)	% change	Willingness-to-pay (mean)	% change
Limited service	Low ambiance quality	4.31	24	138	5.1
	High ambiance quality	5.34		145	
High-end	Low ambiance quality	3.97	35	1180	29.0
	High ambiance quality	5.36		1522	

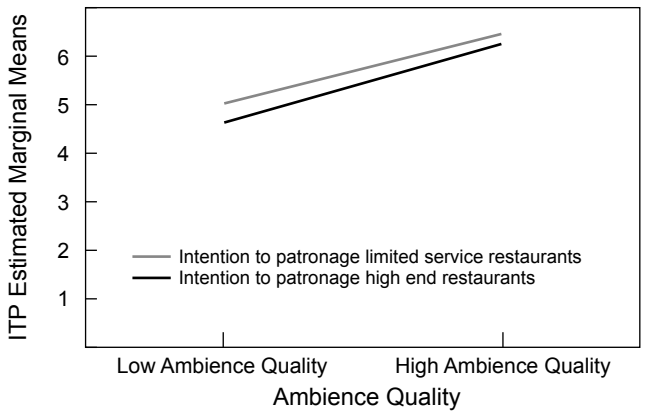

Figure 5: Estimated marginal means for ITP and ambiance

Figure 6: Estimated marginal means for WTP and ambiance (WTP) is measured in Kenya Shillings (KShs.)

Discussion

The findings suggest, however, that, contrary to common belief (DiPietro et al., 2011), the three key restaurant attributes are neither equal nor necessarily always significant in their relationship to consumer intention. The relationship between food quality and ITP/WTP are positive both in high-end and limited service restaurants, but that is not the case with reference to service quality and ambiance.

With respect to service quality and ambiance, consumer preferences for high-end and limited service restaurants differ. In upscale restaurants, the relationship between attributes quality and ITP as well as WTP is positive and significant. Service quality and ambiance remain unpredictable in limited service restaurants. Unlike food quality, in case of limited service restaurants, both service quality (i.e. personalisation) and ambiance have positive and nonsignificant relationships with WTP but it is significant in case of ITP.

The three key restaurant attributes thus have very unique influences on consumers' behavioural intentions, both in the high-end restaurants and limited service restaurants. This is an interesting finding which deserves further investigation. It confirms the questionable universality of consumer preferences across the different sectors of the restaurant industry supporting studies (Mattila, 2001a/b; Min & Min, 2011; Namkung & Jang, 2007).

The differences in the influences of service quality between upscale and limited service restaurants could be partially attributed to the unique differences in customer expectations related to these different types of restaurants. Customers of limited service restaurants usually focus on a limited number of service dimensions such as convenience, speed of service, order accuracy, menu simplicity, ease of product ordering, high use of technology in service delivery, drive-through access, and other speed-related attributes (Grönroos, 1984). In addition, consumers at limited service restaurants spend less time with the service staff and, therefore, may not really place emphasis on personalisation of the service process. Most of the limited service restaurant exchanges are transactional in nature, leaving less scope for service personalisation, and thus it can be expected that ITP and WTP do not significantly change as service personalisation varies from low to high. Similarly, the above discussion can be extended to ambiance and consumer intention in high-end and limited service restaurants.

On the other hand, customers of high-end restaurants display their preference for personalisation of service by the great difference in the means for the low and high service personalisation. They expect high quality food as well as personalisation of service. Consumers of high-end restaurants invariably patronise high-end, upscale restaurants for a totally emotional experience that is beyond the simple physiological gratification provided by food alone. In other words, consumers of upscale restaurants are seeking physiological gratification (food) followed by emotional satisfaction (service) and conspicuous consumption (ambiance). In high-end restaurants, all three service attributes (food, service and ambiance) are important in achieving high consumer patronage.

Conclusions

This study intended to investigate the effect of service attributes on consumer patronage and willingness-to-pay. In particular, it investigated the preferences of consumers in the developing economy of Kenya, with respect to three major attributes in the restaurant industry: food quality, service quality, and ambiance. The study finds that food quality is the only attribute to have a positive and significant relationship with both consumer patronage and willingness-to-pay, in high-end as well as limited service restaurants. Service quality and ambiance both have positive and significant relationships with consumer intentions in high-end restaurants. Moreover, in high-end restaurants, increase in ambience was found to increase patronage and willingness-to-pay with a significant amount if service quality was also increased. When ambiance was improved in upscale restaurants the WTP improved by 29% compared to the 5% in limited service restaurants. This is definitely a significant difference worthy of further investigation.

When service was improved, the upscale restaurant WTP improved by 47% compared to the 19% in limited service restaurants. This is definitely a significant difference. Similarly, the change in the ITP for both the upscale and limited service restaurants was significant with the values for upscale (70.6%) and limited service (34%) restaurants. This clearly shows that service has significant impact on restaurant patronage

and willingness to pay. Interestingly, in the case of limited service restaurants, the relationship between service and consumers' intentions were mixed. The WTP was positive but not significant and the ITP was positive and significant. These findings also indicate, in the case of limited service restaurants, that when service improves, even though consumers are willing to patronise more, they are not willing to pay more. In other words, limited service restaurants can expect higher revenues through repeated patronage but not necessarily higher revenues per customer.

Similarly, the relationship between ambiance and WTP and ITP are different for high-end restaurants and limited service restaurants. The relationship was positive and significant for high-end restaurants and positive but insignificant for limited service restaurants for WTP and significant for ITP. Similar to service, in the case of limited service restaurants, with an increase in ambiance quality the consumers' ITP improved (24%) manyfold compared to WTP (5%), but, in the case of high-end restaurants, it remained consistent for ITP (35%) and WTP (29%).

This study has a few limitations. First of all, it includes only two levels of service attributes, when in reality attribute levels do exist as a continuum versus a dichotomy. It is a scenario-based study with stated preferences, thus the findings could be further explored with secondary data from the industry (i.e. revealed preferences). The data were collected from a developing economy, limiting its generalisability to other developed nations and across cultural boundaries. Furthermore, the three service attributes – food quality, service quality (i.e. personalisation) and ambiance – that were examined, are strongly correlated, and thus any tentative conclusion about any one attribute in isolation may not be prudent unless the influence of the inter-attribute impact is also better understood. In other words, expectation of high ROI for service improvements may not be realistic without proportional improvements in food quality and ambiance. Further studies are required to better understand these complex relationships, including measurement of the slope for change in consumer patronage when service attributes change from low to high. Suggested studies measuring the slope would demonstrate the direction as well as the magnitude of the relationships.

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Culinary and hospitality teaching as a research-based profession

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This is not just an academic paper, it is a resource. It addresses the topic of how hospitality and tourism education is likely to change in 5, 10 and 15 years' time. The principal function of a hospitality academy is to design, plan, prepare and deliver a programme of learning in ways that foster and support student learning. It is also an important point of entry for enquiry into the nature of hospitality professionalism, including public acknowledgement that what is taught and learnt is professional within a recognised "profession". What then are the implications for the future of hospitality education and training, for industry, and for the community, of the development of a hospitality education research base?

Keywords: research; vocationalism; professionalism; scholarship; collaboration

Introduction

Culinary and hospitality teaching is henceforth referred to by the inclusive term hospitality. Hospitality is not currently a research-based profession. If it were, I have no doubt that culinary and hospitality teaching would be more effective and much more satisfying for both teachers and students, and be acknowledged by industry. The aim of enhancing the effectiveness and satisfaction can be achieved by a combination of several means, of which a sufficiently adequate research-base is but one.

My own view is that this is a singularly important ingredient which deserves to be given priority. However, I shall argue here that providing a hospitality education research base requires a radical change both in the kind of research done in hospitality education, and in the way in which it is organised. To make my point, I look inside the hospitality education profession and the education research community to examine what is being done. Also, I shall look at another profession to explore what lessons may be learned about developing hospitality into a genuinely research-based profession.

However, there is a caveat, Hargreaves (1996) noted that much of the money spent on education research annually gave poor value for money in terms of improving the quality of education provided. He concluded that in fundamental respects the teaching profession has been inadequately served by education researchers, but he concluded that "it need not be so". My own view is that hospitality education research is at a very early stage and that the difficulties envisaged by Hargreaves can be avoided. This calls for a form of hospitality educational science, which is not research *about* hospitality education but research *for* hospitality education. Thus, a critical educational science aims at transforming hospitality education; it is directed at educational change. Hospitality educational researchers left to themselves will not adopt the necessary radical reforms. They need others, especially practising hospitality professional practitioners and college lecturers to motivate and direct the work of the research, and to participate actively in the necessary research.

There is currently a gap in the influences that shape hospitality teachers' performance. The solution is rarely to be found in current research studies, policy reform proposals or institutional mission statements. They are more likely to be found in the complex web of formative experiences. Most of us remember teachers who positively impressed us and some who did the opposite; we tend to imitate those we admired.

Rarely have hospitality teachers looked at other professional fields to examine whether they might learn from their structures and cultures. Although unsubstantiated, comparisons have been made, for example, to medicine over many, many years. An article on "Our Profession" in the *The Hotel World,* February, 1897 was as extravagant in tone and aspiration as the mutterings of Phileas Gilbert a contributor to *L'Art Culinaire* for fifteen years. "A profession", declared the anonymous author, "is distinguished from a trade or occupation by the fact that to be recognised a member of it, the member must have passed certain examinations, and experienced certain technical training which pre-supposed her/him to be a person fully qualified to profess and execute the duties incumbent on those who devote themselves to its practice". And on those grounds, "our profession" stood comparison with the most respected and longest established, for it demands more technical knowledge, more study of detail and more exertion of the intellect than all the so-called professions of War, Church, and Law combined, and even the Medical diploma. Such comparison may not be as strange as it first appears.

The medical profession has gained in public prestige concurrently with the growth of its research. The hospitality practice/teaching profession has not. We need to investigate why this is so, and what can be done to change it. My own observation is that hospitality and medicine are basically people-centred professions. Neither believes that helping people is a matter of simple technical application, but rather a highly

skilled process in which a sophisticated judgement matches a professional decision to respond to the unique needs of each client. Yet the two professions see the role of the systematic pursuit of (scientific) knowledge in informing professional practice in very different ways. The kind of science, and thus the kind of research, involved in each profession is very different. The academic infrastructure of medicine is rooted in the natural sciences (anatomy, physiology, pharmacology, etc.). No doctor denies that medical competence requires a grasp of this infrastructure. Doctors draw on this knowledge-base for the technical language of the profession.

There is no agreed formal knowledge base for hospitality teachers, so they lack a shared technical language. It was once hoped that the so-called foundation disciplines of hospitality education (see Hegarty, 2004, p. 102–105) would provide a knowledge-base and were given a degree of importance in the curriculum for hospitality teacher training, but to my knowledge no such programmes currently exist. Therefore, very few practicing hospitality teachers have such a knowledge base or think it important for professional practice. It remains true that many hospitality teachers are able to be effective in their work in almost total ignorance of this infrastructure.

In medicine, as in natural sciences, research has a broadly cumulative character. Research projects seek explicitly to build on earlier research – by challenging, confirming or refuting it, by extending or refining it, by replacing it with better evidence or theory.

Hospitality education research where it exists is in contrast non-cumulative, in part because few hospitality education researchers engage with the creation of a corpus of knowledge which is then tested, extended or replaced in some systematic way. My argument here is that the hospitality education profession needs to engage in research but it must be the kind of research that is able to positively influence hospitality education and practice.

A more striking difference between these two professions is the identity of the people who actually do the research. In medicine, it is possible to draw on the basic sciences which are not in themselves (sui generis) specifically medical – genetics, biochemistry, neuro-physiology, where developments and discoveries are potentially relevant to medical advance. In the same way hospitality teachers can draw on other basic sciences where there is potential for both hospitality and educational application.

There is however, a very distinct difference in the way each of these professions approaches applied research. Much medical research is not in itself basic research (which is left to the basic sciences or medical scientists drawing on such work) but a type of applied research about what works in what circumstances. It is a search for more accurate means of diagnosing medical problems; better ways of managing the patient; the determination of more effective treatments. The people better placed to do this work are not basic scientists or a special category of medical researchers, but actual medical practitioners. A sizeable proportion of the articles and papers in refereed medical as well as popular journals and on the Internet are contributed by practitioners in hospitals and in general practice.

A minuscule proportion of hospitality education research – carried out by proper research procedures and the made public knowledge through publication – is undertaken by practising hospitality teachers: whatever such research is carried out is done by university/college based academics involved in teacher education, who do not teach in hospitality schools.

In medicine, there is little discernible difference between researchers and users: all are practitioners. In hospitality education, by contrast, researchers are rarely users and this gives rise to major problems of communication. This may be seen in the way research is written up and disseminated by the two professions. In medicine there are more than 2000 journals (e.g., The Lancet, BMJ, JAMA) published since the late 1800s and others which aim to communicate to the whole profession on general as well as specialist advances in medicine. In hospitality education the only regular journals which potentially reach some hospitality teachers include the outputs of Cornell, (*Cornell Hotel and Restaurant Administration Quarterly*) and similar institutions such as the Council on Hotel, Restaurant, and Institutional Education (CHRIE), the *International Journal of Hospitality Management* and the *Journal of Culinary Science and Technology*. The latter is approaching only its tenth year of publication and there is little space devoted to hospitality education research. There is not a scrap of evidence that hospitality teachers complain about their lack of access to the findings of applied hospitality education research.

It is this gap between researchers and practitioners which betrays the fatal flaw in hospitality research. For neither the researchers nor the practitioners determine the agenda for hospitality education research. If, for example, practising doctors, especially those in hospitals stopped doing research and left it almost entirely to a special group of people called "medical researchers" who were mainly university academics without patients, then the activity would go the same way as educational research – an elite, private, esoteric activity seen as irrelevant by most practitioners.

Hospitality education research is caught between two stools, that of basic vocational task-based craft training and that of educating professional practitioners in hospitality schools. Hospitality education researchers have become adept at falling off both stools, achieving neither prestige from professional practitioners in the industry, nor gratitude from hospitality teachers in the classroom, despite the claim that "hospitality professionals are no different from other professions such as doctors" (Clancy, 2012). Where is the evidence for such a claim?

How different it is for doctors! The spread of evidence-based medicine is rooting much medical research firmly in the day-to-day professional practices of doctors. In the past, a surgeon who asked why he was treating a patient by means of a particular operation, or why he was using one operating technique rather than another, would often refer back to his/her training. Today, doctors are relying less heavily on the clinical practices in which they were trained and more on an evidence-based approach, in which research into the effects of treatment is used, both by trainers and trainees, as the basis for justification for a particular treatment. In short, some of the most important research in medicine, conducted by practitioners, aims to evaluate the effects of one treatment or one technique rather than another. Because evidence-based medicine, though not infallible, has direct and often immediate relevance to the improvement of their practice and to the benefit of the patient, doctors have huge incentives to keep up to date. Hospitality practitioners do not have such incentives.

Hospitality teaching has not been subjected to the sustained, empirical and practice-oriented inquiry into problems and alternatives which we find in university-based professions. It has been permitted to remain hidden from the light of scrutiny; there is no equivalent to the detailed recording found in medical cases, law cases, or in the physical models of of engineering and architectural achievement. Such records, coupled with commentaries, notes and critiques of highly trained and educated professors, allow new generations to pick up where earlier ones finished. To an amazing degree the beginner hospitality teacher or practitioner must start afresh, uninformed about prior solutions and alternative approaches to recurring practical problems. What hospitality teachers learn about teaching is intuitive and imitative (sitting by Nellie), rather than explicit and analytical; it is based on individual learning rather than pedagogical principles. One's personal predispositions and predilections are not only relevant but in fact stand at the core of becoming a hospitality teacher, as evidenced by the phrase "when I was in the industry". A hospitality teacher can be considered "outstanding" by those who are familiar with his/her work without being thought to have made a single contribution to knowledge of either hospitality or teaching: the ablest people in the occupation are not expected to add to the shared knowledge of the profession's "scholarly community". There is, in short, no tradition honouring the contributions to the craft. In hospitality education there is not enough evidence on the effects and effectiveness of what teachers do in classrooms to provide an evidence-based corpus of knowledge. Hospitality teachers have to discover or adapt most of their professional practices from personal preference, guided neither by the accumulated wisdom of seniors nor by practitioner-relevant research. They see no need to keep abreast of research developments, and regard research journals as not being directed at them. Hospitality teachers rely heavily on what they learn from their own experience in industry, and from trial and error. For a hospitality teacher to quote research in a staff room conversation about a student would almost certainly indicate that he or she was reading a book, studying for a part-time higher degree in education or rehearsing for a review or validation event. S/he would be regarded by most colleagues as "showing off".

The significant difference between the professions, however, is that, whereas doctors are demanding and getting more evidence-based research, hospitality teachers are not even seeing their severe lack of evidence-based research as a problem in urgent need of remedy.

My Ed.D. study of the curriculum development in culinary arts and gastronomy, the *raison d'être* of a higher education institute, for the Bachelor's and Master's degrees in Culinary Arts and Culinary Innovation and their delivery began with the recognition that the curriculum is constructed for a number of purposes including an innate desire for ordered knowledge (Hegarty, 2004). Such a curriculum should embrace the application of science and technology, the ability to make things (meals/experiences), incorporate an understanding of the industry context and lead to the validation of the programme. Also, it examined the contribution of the curriculum development process to the professionalisation of the discipline and to establishing the educational and cultural capital necessary to develop hospitality arts as a subject suitable for scholarship in higher education (Fine, 1996, p. 45–53; 240–242, Chivers, 1972, p. 9–19, 60–77).

In order to draw attention to these features of curriculum research, it is possible, according to Carr and Kemmis (1986, p. 29–34), to set out five different views of what the professional competence of teachers involves.

The common-sense view

This refers to all those approaches which seek to ground research knowledge in practical common-sense experience rather than theory and which are therefore confined to codifying knowledge of existing educational ideas and practices. In this view, the task of the researcher is to facilitate the successful conformity of teachers to traditional patterns of conduct. Professional development simply requires an increasingly skilful use of an existing stock of pedagogical knowledge, of which many hospitality educators are alas as unfamiliar as those who would seek to evaluate their teaching practice.

The philosophical view

This refers to all those approaches which stress the need for teachers to adopt a reflective stance towards the fundamental assumptions and ideals on which their "philosophy of education" depends. The purpose of research, therefore, is to provide teachers with the sort of concepts and insights that are required to formulate a coherent understanding of the nature and the purpose of the educator's role. Teaching is a professional occupation, in this view, because it is guided by a self-conscious understanding of the basic educational principles, rather than by any narrow concern with instrumental or utilitarian goals and motives. Professional competence is therefore a matter of making judgements in accordance with fully articulated principles, values and ideas.

The applied science view

Those who regard research as an applied science take the view that the task of the researcher is to produce scientifically verified knowledge that can be used to ensure that pre-established educational goals are achieved by the most effective means. According to the "applied science" view, the professional expertise of hospitality teachers does not derive from an overriding concern with educational values and goals. Rather, it stems from the possession of the technical skills required to apply scientific theories and principles to educational situations. The professional development of hospitality teachers, in this view, requires teachers to adopt a technical approach to their work, seeking to optimise the efficacy of learning by utilising scientific knowledge. Professional competence, therefore, is judged not by reference to the way in which teachers formulate their aims, but to the effectiveness of their practice in achieving whatever aims are being pursued.

The practical approach

This view, like the "philosophical" view, sees curriculum research as a form of enquiry which is reflective and deliberate and which results not in the production of theoretical knowledge, but in morally defensible decisions about practice. The role of the researcher is not that of an external investigator providing solutions to educational problems but that of a consultant whose task is to assist teachers to arrive at sound

practical judgements. The distinctive professionalism of the teacher, therefore, does not stem from skilful mastery of existing practical knowledge or an ability to apply scientifically accredited technical rules. Rather, it emerges out of the fact that hospitality teachers, like members of other professions, profess an ethic. As with the "philosophical" view, it is recognised that teaching is a professional activity because it involves the pursuit of essentially moral purposes and goals. However, while the "philosophical" view tends to view questions about these moral purposes as somehow separate from questions about their realisation, the "practical" view emphasises how they are realised not *by* teaching but *in* and *through* teaching. Professional competence, therefore, is to be judged not by the ability to articulate and defend moral principles, nor as a matter of traditional conformity or technical accountability. Rather, it is assessed in terms of moral and prudential ability for practical judgements actually made within the context of existing educational institutions. It is a matter of wise and prudent deliberation, not conformity to general traditions or narrowly specified prescriptions for practice.

The critical view

Those who subscribe to this view accept much of the thinking that informs the "practical" view. Both, for example, accept that individual practitioners must be committed to self-critical reflection on their educational aims and values. Where they differ is in the additional claim of the "critical" view that the formulation of these additional aims may be distorted by ideological forces and constraints and their realisation may be impeded by institutional structures. In the critical view educational problems and issues may arise not only as individual matters requiring collective or common action if they are to be satisfactorily resolved. The outcome of critical research , therefore, is not just the formulation of informed practical judgement, but theoretical accounts which provide a basis for analysing systematically distorted decisions and practices, and suggesting the kinds of social and educational action by which these distortions may be removed. Furthermore, while these theories may be made available by the researcher, they are not offered as "externally given" and "scientifically verified" propositions. Rather, they are offered as interpretations which can be validated only in and by the *self-understandings* of practitioners under conditions of *free and open dialogue.* Hence, professional development, in this view, is a matter of teachers becoming more enlightened about the ways in which their own self-understandings may prevent them being properly aware of the economic, social and political mechanisms which operate to distort or limit the proper conduct of hospitality education in society. Professional competence, therefore, requires a capacity for continuous deliberation and critical discussion, by the teaching profession as a whole, of the way in which political and social structures relate to and influence educational aims and practices. This professional discussion must also relate to a wider social debate about the role of hospitality education in society. In this context, I believe a convincing case can be made for the development of the Professional Doctorate in Hospitality Studies, and that it has a clearly defined place in the hierarchy of global higher education degrees/ It should be perceived as differing from, but not as a substitute for the research doctorate; there is an obvious need to create capacity to educate professional hospitality practitioners and those who are primarily educating practitioners;

No sophisticated theory of hospitality education can ignore its contribution to economic development (Durkheim, 1977, Bowles and Gintis, 1976). Indeed, throughout the twentieth and into the twenty-first centuries, the relationship between education and the economy has constantly assumed greater significance. This is due not only to the increasing importance attached to knowledge as a condition for wealth creation, but because of the economic theory of human capital developed since the 1960s (Schultz, 1961, Becker, 1964). The attraction of human-capital theory is that investments in education and training are viewed as profitable for both the individual and for society (Marginson, 1993).

Hospitality education research, where it exists, has little impact on the improvement of hospitality practice either in the property or in the hospitality classroom. Some researchers dying to get their teeth into some serious research projects feel stifled by the lack of support or resources available. They blame themselves for not disseminating their results; they blame their funders for not funding dissemination; and they blame hospitality teachers and practitioners for ignoring the research findings, and failing to act on them. Some of my correspondents have told me that there have been days when they felt they were "banging their heads against a wall with frustration, but they know that this is feature of the culture fostered universally in Hospitality Institutions ..." (C. Gilsenen, personal communication, 2011).

Claiming dissemination as a problem assumes that there is something worthwhile to be disseminated. It also assumes that there is a process of commissioning research and that the research is itself in good shape: they claim that all would be well if the dissemination of the sparse results could simply be improved. In this view these conclusions are for the most part off target. There is no vast body of hospitality education research which, if only it was disseminated and acted upon by hospitality teachers, and industry professionals would yield great benefits in the quality of teaching and learning. The questions that must be asked are: how much research is there in hospitality education which (1) demonstrates conclusively that if hospitality teachers/lecturers change their practices from x to y there will be significant and enduring improvement in teaching and learning and (2) has developed an effective method of convincing these teachers of the benefits of changing from x to y?

We do not have an abundance of evidence about effective professional practice, whether in the education situation or professional practical situation. This lack indicates that perhaps the problem is not with the dissemination end of the process, but with how the research is initiated, how it is commissioned and set in train. Hospitality education research has not to date had a sufficient allocation of funds, nor does it have a community of researchers who could advise through peer review on the allocation of funds in commissioning research. Hospitality education research is not in a healthy state, that is to say it is not having adequate influence on the improvement of practice, therefore it cannot be considered value for money. The result is that hospitality education researchers continue to work on their own self-validating terms; they remain accountable only to themselves, so there appears to be no good reason why they should change. Hospitality

education research lacks the "pull" of industry or the "push" of an academic/national qualification body which ensures the application of hospitality research. The key omission is the lack of involvement of "users", that is, practitioners and policy makers. It is this exclusion which prevents the re-direction of hospitality research towards the improvement of practice.

Therefore, it is necessary to examine the research agenda and the research process and where necessary change it. This means adopting, as an essential prerequisite for improvement, the involvement of user communities, policy makers and practitioners in all aspects of the research process, from the creation of strategic research plans, the selection of research priorities and the funding of projects from the beginning to the dissemination and implementation of policies and practices arising from the research findings. This requires a collegiate approach. College in this sense is understood as a group of equals who entrust their power to their leader. It is a stable group whose structure and authority derive from their pursuit of knowledge in establishing a "community of hospitality scholars" with established "rules and values" fulfilling four essential criteria by which a profession may be recognised. (Hegarty, 2004, p. 31). At the heart of this development it is necessary to forge a new partnership between researchers and practitioners prior to the creation of a seamless merger between the two. Success here will help to address and solve many other problems. Partnerships do currently exist, but are usually at the level of the individual researcher or institution's research project. All this is positive, as is the pressure that funding bodies place on researchers to demonstrate consultation with, engagement, and involvement of users as a condition for getting a research grant.

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How relevant are Hofstede's dimensions for inter-cultural studies? A replication of Hofstede's research among current international business students

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In the present study the cultural dimensions of the well known Dutch researcher Geert Hofstede were tested on a sample of international business students. The sample consisted of 1 033 students from the Netherlands, Germany, China, South Africa and Qatar. The findings of the present research contest many of Hofstede's original findings. The dimensions power distance and long-term orientation show significant differences with Hofstede's original country values. The dimensions individualism, masculinity and uncertainty avoidance show significant differences for half of the countries. No significant differences were found between male and female students. The results show– if anything – that Hofstede seems to be right with his warning to be careful with relatively small samples. Or, it might be that cultures are less stable after all.

Keywords: Hofstede's cultural dimensions; Dutch, German, Chinese, South African, Qatari business students

Geert Hofstede's theory of cultural dimensions

Geert Hofstede is one of the leading academics on culture (Søndergaard, 1994; Kirkman et al., 2006; Merkin et al., 2014). His original research was conducted in the late 1960s and used an impressive sample of 116 000 – mainly male – IBM engineers. Based on his analysis of the dataset, he initially distinguished four, later five and finally even six dimensions of cultural orientation that are different for various national cultures (Hofstede, 2001; Hofstede et al., 2010b). According to Hofstede, these dimensions are both distinctive and stable.

Hofstede (2001) argues that every person carries his/her own "mental programme" which is already formed in their childhood and further developed later in academic institutions and organisations. These programmes contain parts of national culture. Hofstede et al. (2010b) state that the concept of culture can best be described by naming symbols, heroes, rituals, and values as its main components. Differences between people's mental programmes can be best assessed by comparing the values that prevail among citizens of different countries. Values are the stable element in culture. Social anthropology assumes that all societies face more or less the same problems; researchers have suggested the relation to authority, the relation between individual and society, every person's understanding of masculinity and femininity and their ways of dealing with conflicts as common core issues. When analysing the first results of his widely known study at IBM in the late 1960s, Hofstede was able to verify this classification because results within the categories differed significantly among employees from different countries. He called the four categories "dimensions" and depicted them in his 4-dimension model (4D model): **Power distance** "can be defined as the extent to which the less powerful members of institutions and organisations within a country expect and accept that power is distributed unequally". (Hofstede et al., 2010b, p. 61) Secondly, **collectivism versus individualism** means whether members of a society are rather expected to care for themselves or if it is deemed best to first look after the welfare of the society. **Femininity versus masculinity** specifies the extent to which the prevailing values of a society are "masculine" (e.g., assertive and competitive) or if gender roles do overlap. Lastly, **uncertainty avoidance** "can be defined as the extent to which the members of a culture feel threatened by uncertain or unknown situations" (Hofstede et al., 2010b: 191) and try to avoid such situations.

Later, in 1985, Hofstede added a fifth dimension "**long-term orientation versus short-term orientation**", which resulted from his collaboration with the Chinese University of Hong Kong. It combines the values of persistence, thrift, ordering relationships by status and observing this order, and having a sense of shame on the one hand as well as reciprocation of greetings, favours, gifts, respect for tradition, protecting one's "face", and personal steadiness and stability on the other hand (Hofstede et al., 2010b, p. 236/237).

Criticism

Despite the broad acceptance of Hofstede's framework, many other researchers have raised critical challenges and Hofstede has even met with fierce opposition. Especially McSweeney (2002) criticised Hofstede's approach in several respects: his main reproaches are that surveys are not the most suitable way and nations not the best units to examine cultural differences. Also it would be methodically questionable to assign the results of single employees from one company to their entire nation's scores and that five dimensions are not enough to sufficiently determine cultural aspects. Furthermore, the IBM data would now be outdated. In reaction to McSweeney´s (2002) criticism, Hofstede (2002) argued that his survey measured the differences between nations, no absolute numbers and

agrees with McSweeney (2002) that nations are not the most suitable way for measuring cultural aspects but often the only available for conducting this kind of research. Hofstede (2002) is also of the same opinion that surveys should not be the only research instrument and he welcomes every researcher to come up with proposals to define further dimensions. He rejects the accusation of relying on outdated data by claiming that they have centuries-old roots and that recent replications show no loss of validity. Williamson (2002) contributes to this discussion with an unbiased view from a third person and can be recommended for further reading in this regard.

Jones (2007) lists in his comparison of strengths and weaknesses of Hofstede's methodology many of the points McSweeney (2002) mentioned and adds the issue of possible political influences to the development of some dimensions (especially masculinity and uncertainty avoidance) in the time of the Cold War. Orr and Hauser (2008, p. 16) cite the same argument when recommending that Hofstede's "theoretical constructs need to be thoroughly reexamined within the context of early 21st century cross-cultural attitudes and patterns of behavior". Signorini et al. (2009) criticise the "oversimplification" of cultural differences and inconsistencies between categories in Hofstede's 5-D-model and find fault with the fact that it is static, not dynamic.

Fang (2003) focuses on Hofstede's fifth dimension as he argues that there is a philosophical flaw underlying the assumptions of this dimension because the short-term oriented values are labelled as negative and long-term ones as exceptionally positive, which violates the Chinese principle of yin and yang. Furthermore, Fang (2003) notices that the fifth dimension consists of many overlapping value attributes which might lead to confusion and he points out that these values are based on the opinions of students who do not necessarily represent a majority of the population. Consequently, he challenges the validity of Hofstede's fifth dimension and proposes to take the concept of yin and yang into closer consideration for possible revision of some of the aspects of this dimension.

Yeh (1983) also focuses on the Asian context and doubts that Hofstede's analysis of Asian (especially Chinese and Japanese values) is sufficient, because they may interpret value scales in a different way than citizens from Western countries do or may hold other values that are not considered by Hofstede. However, as Minkov and Hofstede (2011) describe, Geert Hofstede tried to solve the "Western bias" in his original VSM by introducing the fifth dimension of long-term-orientation, which he had found to be especially relevant for Chinese respondents.

In a similar way, Huo and Randall (1988) present their findings that sub cultural values from habitants of four different Chinese-populated regions are likely to vary significantly and lead to distorted results. Kwon (2012) extends this research using Hofstede's dimensions to regional differences in China concerning work-related values. Hofstede et al. (2010a) come to a similar conclusion based on their attempt to compare the results of the VSM from different Brazilian counties. As they state, they regard the VSM as "too coarse a net for catching the finer cultural nuances between Brazilian states. Adding locally defined items would have made the studies more meaningful" (p. 336).

Orr and Hauser (2008) emphasise in this context that the change in the political landscape in recent years entails that cultural and sub-cultural differences that were constrained over a long period of time have started to emerge. This should be taken into consideration when applying Hofstede's dimensions.

Replications in various contexts

The large number of publications referring to Hofstede's work and using his approach indicates its high relevance for over 40 years now. His five dimensions are the most widely recognised and robust (Gong et al., 2007) framework for doing national culture research (Hambrick and Brandon, 1988) and Hofstede's work can still be seen as the most comprehensive and relevant study of cultural differences (Holden, 2004).

As Hofstede (2001, p. 461) writes, all six areas that he proposed for further continued research more than 20 years ago (1. non-Anglo cultural dimensions; 2. additional countries; 3. cultural changes over time; 4. sub-cultures, such as regional, occupational, and organisational cultures; 5. the consequences of cultural dimensions; and 6. foreign organisational and management theories) have been covered. Søndergaard (1994) provides an early overview and classifies citations of Hofstede's work. Besides mere mentioning, criticisms (see above), replications as well as paradigmatic applications are the most common categories. The most recent and comprehensive overview of applications and replications of Hofstede's research in any field has been published by Kirkman et al. (2006). Different from Søndergaard (1994), they classify applications and replications from Hofstede's work as studies where culture is examined as a main effect (Type I studies) at the individual level of analysis, and then at the group/organisation and country levels. Studies that incorporate culture as a moderator, they call Type II studies.

Hofstede et al. (2010b, p. 35) identify six major replications by Hoppe (1990) in an Austrian "elite" context, Shane (1995) on employees, Merritt (1998) on US-American airline pilots, de Mooij (2001) on consumers, Mouritzen and Svara (2002) in a municipal context and van Nimwegen (2002) on bank employees. All six studies mainly confirmed his finding from the original IBM study.

Also, within the fields of tourism studies (Crotts, 2004; Litvin et al., 2004) and information technology (Harvey, 1997; Smith and Chang, 2003) and Kang and Mastin (2008) with their research on tourism public relation websites as a combination of both, some researchers have conducted studies in which they applied or replicated Hofstede's work. Another major field of replication is the attempt to extend Hofstede's findings to other countries or continents. Jackson (2011) focused on Africa, Gray and Marshall (1998) on Kenyan and Korean management orientations, Vadi and Meri (2005) used Hofstede's framework to compare it to Estonian culture, Nasierowski and Mikula (1998) measured the cultural dimensions of Polish managers, and Naumov and Puffer (2000) did the same in a Russian context.

Fernandez et al. (1997) replicated Hofstede's IBM-study also in a working-related context although their sample of 7 201 respondents did not consist of employees from only one company. The nine countries included were the USA, Germany, Japan, the former Yugoslavian states, China, Venezuela, Mexico, and Chile, and their results yielded useful findings of some significant changes – some of the values of

the population of some states had undergone in the years since the Hofstede-study was conducted. Wu (2006, p. 185) conducted an update of the original study in one eastern culture, Taiwan, and one Western, the USA. His results suggest "that work-related cultural values in a specific culture are not static and can be changed over time" and support Fernandez et al.'s (1997) findings. Thus, both authors recommend the periodic updating and re-evaluation of many cultural theories and examinations.

Replication using a student population

This study will elaborate on research that has been conducted applying or replicating Hofstede's approach with a student population. Similar to the publications in other contexts, most of the authors pursue a more concrete goal and/or are doing research within a narrower field of study (e.g. a certain degree programme) than conducting a replication of Hofstede's research. In this regard, Bearden et al. (2006) as well as Blodgett et al. (2008) tried to apply the VSM questionnaire at an individual level to find out if this would also have the potential to yield valuable results. However, as expected and suggested by Hofstede et al. (2008), both come to the conclusion that the instrument lacks sufficient validity and is unsuitable to represent multidimensional traits since the instrument is explicitly designed for application in a national context.

Often, the Hofstede approach is used to evaluate cultural aspects of the focus group in combination with other instruments or applied only partly with regard to the measurements of certain dimensions as, for example, Gerritsen (2012) did to measure the uncertainty avoidance indices of 84 Dutch and German Bachelor's students by using the original VSM 94. Payan et al. (2010) focused on the dimension of individualism/collectivism when they asked marketing and business students from nine countries about their perceptions of academic honesty and then compared the results obtained against Hofstede's original country scores. Simeon et al. (2001) concentrated on the masculinity-index when they examined gender role attitudes in China, Japan and the USA from altogether 2 832 business students. For this purpose they distributed a revised version (by Dorfman and Howell in the late 1980s) of Hofstede's work-related cultural value scale to measure and compare masculinity and femininity in the three focus countries.

The former research design seems to be applied more commonly, as the following examples show. Quite specific and focused appears Littlemore's (2003) study of the understanding and interpretation of metaphors used by British lecturers of Bangladeshi students at a British university. In order to evaluate possible cultural differences between both groups, the author administered Hofstede's VSM questionnaire.

Boland et al. (2011) had undergraduate students majoring in accounting from Australia (59 respondents), Belgium (121 respondents) and Japan (64 respondents) at different universities in these three countries fill out Hofstede's VSM for Young People 97 version and Kolb's Learning Style Inventory to examine if a relation between cultural factors and the students' learning preferences can be established. Also within the field of accounting but with a more psychological notion, Ho and Lin (2008) used Hofstede's VSM 94 as a part of their data collection to evaluate the participants' cultural values. In combination with Thorne's Defining Issue Test (assessment of the moral development) they aimed to test the relationship between cultural values and cognitive moral development.

In an educational context, Sulkowski and Deakin (2009) used Hofstede's dimensions to devise their own questionnaire to evaluate students' attitudes, values associated with learning, teaching, aspirations, and ethics. Tapanes et al. (2009) focused within this field on e-learning in their pursuit of establishing a link between cultural values of participants and the perceived outcome of such a course. For this purpose, they posed direct questions about culture in the online classroom and used Hofstede's VSM as an instrument to assess the students' cultural preferences. Also within the learning context, Tempelaar et al. (2012) investigated cultural differences in learning related dispositions amongst 7 300 first-year students from 81 different nationalities, using the framework of Hofstede as a reference. As a result, their research revealed that cultural differences in inter-correlations turned out to be substantial, which indicates "the difficulty of constructing culture invariant learning theories" (Tempelaar et al., 2012, p. 3).

Rienties and Tempelaar (2013) studied a sample of 757 international students from 52 countries to see if nine geographical clusters using Hofstede's cultural dimension scores would relate to personal-emotional and social adjustment issues. Their findings show that "international students from Confucian Asia score substantially lower on academic integration than their Western peers, with moderate to strong effect sizes. The cultural dimensions of Hofstede significantly predicted academic adjustment and social adjustment, in particular power-distance (negative), masculinity and uncertainty avoidance" (p. 188). They suggest that extra support for especially non-western students would be called for.

Rienties et al. (2014) use a sample of 146 Dutch and 215 international students which they cluster into ten geographical clusters using Hofstede culture difference scores. They do not attempt to find the actual scores for the participants in their sample, but – as in most studies that use Hofstede – they use the values that Hofstede provides in his reports.

Tantekin et al. (2011) limited their research to architectural students and used the VSM-questionnaire to evaluate their cultural dimensions in order to test their hypothesis that an architect's professional culture develops significantly during his/her studies. Thomas et al. (2009) approached altogether 110 management students in Cyprus and South Africa using Hofstede's questionnaire to examine attitudes toward work-related ethics and courses of business ethics at the local universities and to verify if possible differences were rooted in the different cultures of the students' country of origin. Mueller and Thomas (2000) sought to find out if entrepreneurial traits varied across 9 countries but used Hofstede's original scores solely as a reference framework against which they compare their results.

In the context of natural sciences, Arrindell et al. (2003) obtained valuable results of the Fear-Survey-Schedule III by using a large sample of 5 491 students from natural, life, and social sciences as well as humanities from eleven countries to measure public anxiety phenomena. They explicitly point out the potential to compare their results against Hofstede's country scores to "predict observed mean level differences in national fears" (p. 477).

Within the context of Information Technology, Kock et al. (2008) assessed Hofstede's model by comparing data related to information overload obtained from 108 New Zealand MBA students to Hofstede's original country scores. The authors ultimately doubt the accuracy of applying the model in an IT context. Although also confined to the discipline of human-computer interaction (HCI), the studies by Abdelnour-Nocera et al. (2012) and Oshlyansky et al. (2006) have the potential to provide broader insights into cultural thinking of students because the authors conducted their studies in five and eleven different countries respectively. Abdelnour-Nocera et al. (2012) distributed questionnaires in the UK, Denmark, Namibia, Mexico and China and thus point out their broad orientation to four different continents. Their sample remains fairly small with 20 students per country and Hofstede's VSM is applied in addition to Hayes and Allinson's CSI survey. Unfortunately, they do not provide insights in the results they obtained but rather elaborate on the purpose of their study and the methodology they applied. Oshlyansky et al. (2006) conducted their research in a HCI-context in the Czech Republic, Greece, India, Malaysia, New Zealand, Saudi Arabia, South Africa, the United Kingdom and the United States (the number of responses from the Netherlands and France turned out to be insufficient) explicitly with the intention to update Hofstede's research "with a younger, different demographic" (Oshlyansky et al., 2006, p. 11). Furthermore, the authors managed to gather a sample of all in all 1 426 students and only included countries with a valid sample of close to 100 questionnaires. The results of the study ultimately do not replicate Hofstede's original findings (except for the dimension of individualism). Moreover, their factor analysis unfortunately showed that all of the dimensions tested in the VSM had too little explanatory power and therefore failed to yield usable results.

Girlando and Eduljee (2010) chose a similar approach in a smaller context when they updated Russia's and the USA's country scores on Hofstede's dimensions by taking VSM samples from US-American students and Russian students studying in the USA and in Russia.

In this sense, further research has been conducted by researchers with the intention to replicate and in this way to complement Hofstede's original findings by calculating scores on the cultural dimensions for countries that were not included in Hofstede's IBM study. Examples are the studies by Podrug et al. (n.d.), who distributed VSM-questionnaires to 68 Croatian, 30 Bosnian, and 30 Slovenian students in order to be able to reveal possible cultural differences in cultural mindsets of citizens of the former Yugoslavian republics (see also Tipurić et al., 2007 for a similar approach). Similarly, Alkailani et al. (2012) replicated Hofstede's study using 795 Jordanian students to calculate their country's scores which was then assimilated by Hofstede with the scores obtained from other Arab countries. Huettinger (2008) replicated Hofstede's study to obtain separate scores for Latvia and Lithuania also by asking about 600 students altogether to fill out VSM-questionnaires. Kolman et al. (2003) used student samples to estimate the scores of the Czech Republic, Hungary, Poland, and Slovakia to examine if there are substantial differences in value orientations in comparison to Western European countries and among the four countries.

By far, the broadest approach in this overview was taken by van Oudenhoven (2001, p. 89germ) in his attempt to cross-validate Hofstede's study and to "investigate the relationship between culture as perceived and culture as desired". By letting over 800 advanced students of economics and business administration from ten countries first assess a company of their choice which they would know very well on the five dimensions and then indicate what the ideal target state in their personal opinion should be, they could support Hofstede's categorisation but did not establish a relation between perceived and desired corporate culture.

This overview clarifies that most of the applications in a student context focus on a certain field of study (e.g. accounting or educational settings, etc.) and try to examine defined issues (e.g. perceptions of academic honesty or understanding of metaphors, etc.) within the chosen context. Many researchers use Hofstede's original findings and compare their measures obtained from different survey methods against them or focus on certain dimensions from Hofstede's model. There seem to be only a few direct replications in a student context and these replications mainly seek to evaluate scores for countries that were summarised by Hofstede under regional scores (e.g. Jordan under the scores for some Arab countries) or for countries in regions that have undergone significant political changes (e.g. the Balkan States) in recent years. Therefore, most of the direct replications were conducted in countries other than the Netherlands, Germany or China. For several reasons, replication studies that include samples of one of these three countries (e.g. Oshlyansky et al., 2006) did not yield sufficient or usable results that could be used for further comparison.

All sources mentioned are listed in Appendix A to provide an overview over the various applications and replications mentioned and the way they used Hofstede's instrument and dimensions. In some categories, further examples of studies in a Hofstede context that are not mentioned above are also provided.

In this regard, it becomes evident that our study has the potential to add further meaning, especially to the question commonly raised by critics as to whether Hofstede's dimensions can still be regarded as valid and meaningful. Moreover, the participants of this study attend various degree programmes from many different fields of study, which further contributes to obtaining more meaningful results. Further conclusions from findings from other authors and researchers will be drawn in the research methods section further below.

Issues for investigation

The aim of this study is to validate Hofstede's results on a new sample. As discussed in the literature review, several replications in a student's context have been conducted. This research is designed to add to the research done already and to support future research in the area. The outcomes of this research are expected to be valid and of interest for researchers in this area and related fields. As Hofstede et al. (2008) state in their manual for the VSM 08, "essential to the use of the VSM is that comparisons of countries should be based on matched samples of respondents: people who are similar on all criteria other than nationality that could systematically affect the answers" (p. 5). Our student sample from one university (see below) matches with such important criteria as a similar educational background (otherwise the students' application would have been rejected by the university) or a similar age range.

Hofstede et al. (2010b) also claim that the usefulness of a replication increases with the number of countries involved. They furthermore state that six major replications were done between 1990 and 2002, all of which include 14 countries or more. However, they also acknowledge the validity of smaller studies including two or three countries only. Research and replications seem to have shown that a confirmation of Hofstede's work can be found even in these samples (Hofstede et al., 2010b).

The sample of this research consists of young adults, male and female, mostly between 17 and 24 years old that are studying at the Dutch-based Stenden University. Stenden University (hereafter Stenden) is the result of a merger in the beginning of 2008 between CHN University (Christelijke Hogeschool Nederland) and Drenthe University, and currently has around 11 000[2] students from over 50 different countries. It operates on five different sites in the Netherlands (Assen, Emmen, Groningen, Leeuwarden, Meppel) and has also four branches abroad, in Indonesia (Bali), Qatar, South Africa and Thailand. At Stenden, students from all over the world attend classes; however the three major groups distributed among all campus sites were determined to be Dutch (around 8 000 students total), Germans (1 800 students), Chinese (250 students) and smaller numbers of South African and Qatari students.

Most students participating in this research follow courses in international hotel management or media and entertainment management. The five main nationalities, namely Dutch, German, Chinese, South African and Qatari students studying at this university, have been chosen as major areas of interest and therefore a focus was set on the investigation and the replication of Hofstede's model regarding these. Next to the interest in the verification and testing of Hofstede's results a second aim of this research is furthermore to provide recommendations to the university and support an increase in quality of teaching through an increase in cultural knowledge.

The rationale behind this research is to find out whether or not Hofstede's study from the late 1960s can be used and applied to an international student context in the 21st century. This study is therefore an attempt to validate Hofstede's originally suggested dimensions by using an adapted version of the original instrument called "Value Survey Modules" (VSM 08) on a student population.

The following problem statement and research questions state the main aims of this study:

Problem statement

Do the scores of Stenden students from the Netherlands, Germany, China, South Africa and Qatar show a pattern comparable to the scores for these countries in the original Hofstede population?

Research questions

1. Using the key from Hofstede's manual, is there a significant difference between the relative country scores in the Stenden sample and the original IBM population?
2. Is there a difference in gender for the various dimensions across the four countries?

Method

Instrument, sample and data collection

Since the main aim of the study was to replicate Hofstede's original research, we decided to use the VSM 08 questionnaire that is freely available on Hofstede's website. One question on gender was added to study the second research question.

Given the size of the university a first targeted sample size was set at an ambitious goal of 4 000 respondents to improve validity. The authors knew that it would be challenging to reach this number of respondents and agreed to accept a minimum of 2 000 respondents while trying to reach the set 4 000 people target. In the end, given time limitations, availability of students and the scope of this project the sample size ended up being 1 201 (621 Dutch, 181 German, 124 Chinese, 58 South African, 121 Qatari and 96 from various other countries). Since Hofstede et al. (2008) state that a sample size including respondents from one nation should be bigger than 20, we obviously were able to obtain an amount of data which enables us to draw significant conclusions.

The survey was distributed in a printed version to students randomly on the Dutch campus sites of Stenden University by the authors and collected directly. At the same time, the questionnaires were distributed to students directly by their lecturers and collected in a specified place at school. The questionnaire was also available as an online version on www.thesistools.com and invitations to participate were sent by e-mail and via facebook to Stenden students. The majority of questionnaires were distributed in English (VSM 08) since the language of instruction in most courses is English. However, given some streams of the university being taught in Dutch, the Dutch version of the VSM 08 was retrieved from the official Hofstede website and distributed among the respective students. Given potential language difficulties for some of the Chinese and German students, a Chinese/German version also officially available on Hofstede's website[3] was placed online and distributed. This was done to assure a good understanding of the questions and ensure reliable answers.

Table 1 provides an overview of the methods used for data collection and the number of questionnaires that were returned.

All results from the paper questionnaires were transferred to evaluation forms that are computer compatible. This way, the results were read into the computer and the results were available as a digital version in Excel format. The results of the online questionnaires were directly available as an Excel file and then added to the file of the computer readable versions to have one file including all results.

All results were transferred into SPSS for the subsequent steps such as descriptive statistics, *t*-tests, and ANOVA tests.

Hofstede's original key of the VSM 08 questionnaire was used to compute the scores for the five dimensions. The scores found

Table 1: Overview of the respondents yielded by each mode of data collection

Mode of collection	Questionnaires returned
Free-range collection (Stenden study landscape)	160
Online questionnaires	105
Classes/Teacher and staff support	936
Total	1 201

in this research were then compared to the original findings from Hofstede's IBM-study using *t*-tests and ANOVA tests.

Also, comparisons between female and male respondents of the same country as well as between only female respondents of different countries and only male respondents of different countries were tested using a series of *t*-tests.

Screening the data

When the data were entered into SPSS and labeled correctly, we found that there were many cases that were not suitable for further analysis. There were a number of cases that had too many missing values (more than 20%) and they were discarded immediately. Based on the different scores in the original Hofstede research, we also decided to screen the group of South African students and to exclude students from neighboring southern African countries such as Zimbabwe and Zambia. A special case are the students from Qatar. These students have various backgrounds, from Lebanese to Pakistani and original Qatar. Following Hofstede and Alkailani et al. (2012), we decided only to accept students with an Arab background and to cluster them into one group.

Finally, after computing all the scores for the Hofstede dimensions, we decided to omit all cases with missing values.

Table 2: Gender of respondents within nationality

Nationality	Total	Male	Female
Dutch	588	218	368
German	168	48	118
Chinese	117	40	76
South African	54	17	36
Qatari	106	37	67
Total:	1 033	360	665

Note: There were missing values, therefore totals do not always match male/female counts

Results and analysis

The resulting sample consists of 1 033 students, of which 360 are male (35%) and 665 are female (65%). Table 2 provides a male/ female division per country of interest.

Table 3 presents the scores for the five Hofstede dimensions. To put the scores into perspective, the original Hofstede scores are placed in the adjacent columns (S = Stenden; H = Hofstede):

At face value there appears to be some striking differences between the original Hofstede values and the scores for the Stenden sample. To test whether these differences are significant, a series of one-sample *t*-tests were performed on each dimension and for each nationality. For the Hofstede values a fixed norm score was taken from the original scores. The results in Table 4 show that indeed for a number of dimensions the Stenden sample scores are significantly different from those of the Hofstede population:

The analysis shows that Power Distance seems to have increased among Dutch, German an South African business students, but to have decreased for Chinese and Qatari students. Individualism has increased for Chinese students, but decreased for South African students. The Dutch Stenden students are much more competitive than the Dutch IBM engineers in 1970.

Dutch and German students show a decrease in Uncertainty Avoidance, where Chinese students show an increase in this dimension. Long-Term Orientation has decreased for Chinese students, but increased for the other four nationalities.

If anything, all scores of the Stenden sample seem to converge, where the original Hofstede sample scores differentiated more between the various nationalities.

Given the fact that it is well known and perceived that males and females are different, even if from the same country, it seems interesting that only a few researchers (see Kolman et al., 2003; and Hofstede, 2001) have compared or analysed the different scores between males and females within a selected sample. For Hofstede's original IBM research this might have been less relevant as it consisted of 92.5% males. However, since that the Stenden sample is 65% female (see Table 1) it would be interesting to look further into the matter and

Table 3: Comparing scores Hofstede (H) versus Stenden research (S)

	N	PDI		IDV		MAS		UAI		LTO	
		H	S	H	S	H	S	H	S	H	S
Dutch	588	38	49	80	76	14	44	53	27	44	61
German	168	35	55	67	67	66	51	65	31	31	83
Chinese	117	80	66	20	49	66	60	30	63	118	68
South African	54	49	63	65	47	63	57	49	54	34	75
Qatari/ Arabic world	106	80	58	38	39	52	49	68	64	36	58

Table 4: Statistical comparison of Hofstede and Stenden scores

Nationality	PDI	IDV	MAS	UAI	LTO
Dutch	0.000***	0.152	0.000***	0.000***	0.000***
German	0.000***	0.926	0.000***	0.000***	0.000***
China	0.003**	0.000***	0.246	0.000***	0.000***
South African	0.034*	0.002**	0.394	0.532	0.000***
Qatari	0.000***	0.831	0.613	0.522	0.002**

Table 5: Differences in scores between males and females for all dimensions

Country	Label	*N*	PDI	IDV	MAS	UAI	LTO
Dutch M	1	218	52	74	48	24	53
Dutch F	1	368	47	78	42	30	65
Sig.			0.212	0.426	0.133	0.284	0.022*
German M	2	48	61	81	39	32	91
German F	2	118	51	62	55	31	80
Sig.			0.24	0.079	0.081	0.941	0.342
China M	3	40	67	53	58	72	55
China F	3	76	65	47	61	59	78
Sig			0.874	0.566	0.829	0.275	0.083
South Africa M	4	17	66	48	61	35	75
South Africa F	4	36	62	46	55	63	75
Sig.			0.795	0.870	0.727	0.105	0.987
Qatar M	5	37	63	58	53	59	59
Qatar F	5	67	57	26	48	68	56
Sig.			0.449	0.009**	0.672	0.436	0.864
South Africa M	4	17	66	48	61	35	75
South Africa F	4	36	62	46	55	63	75
Sig.			0.795	0.870	0.727	0.105	0.987

add to the analysis respectively. To test for possible differences we performed a series of ANOVAs per nationality for each dimension. Table 5 shows that there are actually only two significant differences: between Dutch males and females for Long Term Orientation, and between Qatari males and females for Individualism. Qatari women appear to be more collectivist than Qatari men:

Discussion

Even though Hofstede et al. (2008) continually stress the difficulty to replicate his study and the near impossibility of comparing scores to the original scores, this research managed to collect data from a sample that fulfils the requirements of a homogenous group of people (international students within a certain age bracket). This allows for a comparison between the original scores and the scores found at Stenden University and some conclusions respectively. Generally speaking it can be acknowledged that Hofstede et al. (2008) are not keen on replications done by enthusiastic amateurs (the term is Hofstede's, on p. 5), given the fact that this will lead to confusion and potential false accusations of the invalidity of the original research. This research is not supposed to discredit Hofstede's original work, but rather aims to provide a new perspective looking at it in a new context and time. The fact that many differences with Hofstede's original results were found was to be expected, based on the new surrounding of the research and previous research conducted by numerous researchers.

With a total sample of 1 033 students, with five nationalities that include more than 50 students, the study meets the criteria that Hofstede et al. (2008) list in the VSM 08 manual: "Sample sizes smaller than 20 should not be used" (p. 3), and "people who are similar on all criteria other than nationality that could systematically affect the answers" (p. 5).

Our results confirm many of Hofstede's original findings with regard to the ranking of the countries against each other, not necessarily in the absolute scores we obtained. This is in line with Hofstede et al.'s (2008) advice in the manual with regard to interpreting obtained results.

For the dimensions Power Distance and Long Term Orientation, all Stenden scores differ significantly from Hofstede's original scores, but the relative rankings remain the same for all but the South African scores. The other three dimensions present a more diverse picture. In the dimension Masculinity the Dutch still are the most "feminine" country, although they score significantly higher than 40 years ago. However, what clearly strikes the eye is the comparably close range of scores which means that the extreme differences in all categories between the countries tested have diminished in comparison to the original results.

The relatively young age (approx. 17–24) of the respondents may explain this finding as well as the similar educational background of the students, although that is recommended by Hofstede et al. (2008) in their manual. The tendency that national differences are increasingly evening out is quite evident.

Looking at the analysis done with regard to gender it seems amazing that so few differences between males and females can be observed. This might be explained by the nature of the (hospitality and tourism) studies at Stenden, but more research with possibly qualitative methods would be advised.

Limitations

We are aware of the fact that although we have chosen a context for our research that meets the requirements for conducting a replication of Hofstede's original study as well as possible (homogeneous focus group, sufficient sample size, etc.), there certainly are facts that can be named as limitations for this study. Obviously, the sample sizes of the different nations – although in total sufficient for yielding valid results – vary significantly. Another important aspect that should be borne in mind when interpreting the results is the fact that all German and Chinese students are studying abroad, whereas the Dutch and most of the South African and Qatari respondents basically attend university in their home country. It seems reasonable to assume that students who deliberately choose to study abroad (especially Chinese who study far away from their

home) are likely to have different mindsets in comparison to students who choose to stay in their home country.

Besides these more conceptual constraints, we experienced some practical challenges with regards to the instrument itself: the five-point Likert scale that was used for the questionnaires was found to be counter-intuitive. Like in the original Hofstede research, five meant that the item is of very little or no importance and one meant that the item is of utmost importance. While transferring the questionnaires to the computer-readable sheets, the researchers found a few questionnaires with a comment that indicated the respondents' misunderstanding. This way, the researchers could continue with the right answers. This issue was noticed halfway through the project and therefore measures were taken to provide additional verbal instructions when filling out the questionnaires thereafter to get reliable answers.

Furthermore, the researchers clearly stated in the introduction to the online survey that the same study was done in paper form at school and asked people to participate only once. This way, the risk of having double results from one person was minimised, but could not be fully controlled.

All results from the paper-based questionnaires were transferred manually to computer-readable sheets. The research team did this with much concentration and many breaks to make no mistakes. However, it can be assumed, that some mistakes were made during this process, which could influence the results of the research.

Language problems while completing the questionnaire could also be stated as a limitation. Especially Chinese students in their first year of study, and Dutch students following classes only in Dutch might had problems with the English language. To avoid this problem, the questionnaire was made available in Dutch, English, Chinese and German.

Last but not least, it might have been helpful to use a more systematic approach to reach the student population to be able to reach a bigger sample size.

Notes

[1] The authors wish to thank Maarten Bos, coordinator digital assessments and virtual learning, for his assistance with the data transformation; and Dan Wang, master student Service Management for her assistance with the statistical analysis.

[2] All numbers have been provided by Ritske Tjallingii, Senior Functional Application Manager at the Information & Registration Office of Stenden University.

[3] http://www.geerthofstede.com/research--vsm

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Appendix A: An overview of applications and replications of Hofstede's work

Table 6: Overview over applications/replications of Hofstede's work

Authors	Year	Sample	Focus
Replications of Hofstede's study in business contexts			
Hoppe	1990	Elites (e.g. members of governments) from 18 countries	Application using the VSM 82
Merritt	2000	Commercial airline pilots from 19 countries	Replication using the VSM 82
Mouritzen & Svara	2002	Top municipal civil servants from 14 countries	Replication using the VSM 94
Nasierowski & Mikula	1998	Polish respondents who intend to go into business management	Exploring cultural dimensions of young Polish managers using Hofstede's instrument
Shane	1995	Employees of 6 international corporations from 28–32 countries	Replication in an employee's context
Van Nimwegen	2002	Employees of an international bank in 19 countries	Replication in a banking context
Wu	2006	Employees from US and Taiwanese universities	Replication of Hofstede's study in the USA and Taiwan
Studies using Hofstede's work as a frame or a reference			
Arrindell et al.	2003	5 491 students from 9 different countries	Use of Hofstede's dimensions as a reference when comparing results obtained from other surveys to study phobic anxieties
Bunchapattanasakda & Wong	2010	MBA students currently working in Chinese multinational companies and studying in public and private universities in Bangkok	Use of Hofstede's VSM as a basis for the development of own research questions to analyse Thai and Chinese social concepts
Crotts	2004	302 US residents travelling abroad for the first time	Testing the impact of cultural distance on overseas travel behavior (Using Hofstede as a guideline in comparing results)
Kang & Mastin	2007	Sample frames of English-language tourism websites	Use of Hofstede's work as a frame to identify valid explanatory factors that account for differences in tourism websites
Mueller & Thomas	2001	1 800 students in nine countries	Use of Hofstede's framework as a references to compare tested hypotheses psychological on traits associated with entrepreneurial potential against it
Rienties & Tempelaar	2013	757 international students from 52 countries	A study that compares the relationship between geographical background with personal-emotional and social adjustment issues
Rienties et al.	2014	334 students from ten different countries	The study examines the distinctly different academic and social integration processes amongst international students. The students are divided into nine geographical clusters in line with Hofstede's cultural difference research
Tempelaar et al.	2012	7 300 first-year students from 81 nationalities	Investigate cultural differences in learning related dispositions using the framework of Hofstede as a reference
Thomas et al.	2008	Cypriot and South African management students	Use of Hofstede's framework as a reference in order to understand attitudes towards workrelated ethics and the teaching of business ethics in management programmes at universities
Vadi & Meri	2005	Application with Estonian hotel staff members	Measurement of the Estonian culture using Hofstede's framework as a guideline
Studies testing/referring to single dimensions of Hofstede's work			
Gerritsen	2012	84 Dutch and German bachelor's students	Use of Hofstede's instrument to evaluate the dimension of uncertainty avoidance
Payan et al.	2010	Marketing and business college students from 13 countries	Use of Hofstede's instrument to measure the dimension of ind/col to ultimately test their perceptions of questionable behavior concerning academic honesty
Schimmack et al.	2005		Focus on the individualism/collectivism dimension and analysing its validity for cross-cultural research (Hofstede's approach is compared against others)

Appendix A: Continued

Authors	Year	Sample	Focus
Studies using Hofstede's dimensions to only evaluate cultural values as a basis for further research			
Abdelnour-Nocera et al.	2012	20 undergraduate students in each of 6 different countries	VSM only one part of the study (to evaluate students' cultural values)
			Research in a HCI context
Ho & Lin	2008	Exploring a relationship between cultural values and cognitive moral development	VSM only one part of the study (to evaluate students' cultural values)
Littlemore	2003	Bangladeshi students at a British university	VSM only one part of the study (to evaluate students' cultural values)
Sulkowski & Deakin	2009		Use of Hofstede's dimensions to evaluate students' attitudes values associated with learning, teaching, aspirations, and ethics
Tantekin et al.	2009	Second and third-year architectural students	Use of the VSM to evaluate their cultural dimensions in order to test their hypothesis that an architect's professional culture develops significantly during his/her studies
Tapanes et al.	2009	Instructors and students in online learning courses	VSM part of the survey in the attempt to establish a link between cultural values of participants and the perceived outcome of such a course
Studies testing the validity of Hofstede's framework in different contexts			
Bearden et al.	2006	292 graduate students	Test of the validity of the VSM on an individual level
Blodgett et al.	2008	157 graduates and faculty members	
Cronjé	2011	12 S&T students from Sudan and 5 professors from South Africa	To what extent is Hofstede's research also a suitable basis for qualitative research? (Hofstede's cultural dimensions are used as categories of interpretation)
Harvey	1997	Comparison of the designs of geographic information systems (GIS) in a German and a US county	Does Hofstede's framework apply to the actual practice of information system design?
Kock et al.	2008	108 US and New Zealand MBA students	Test the validity of Hofstede's dimensions as a basis to explain IM phenomena
Replications of Hofstede's study in a country-specific context			
Alkailani et al.	2012	795 graduate students from universities in Jordan	Replication of Hofstede's original research in Jordan
At-Twaijri et al.	1996	Multinational companies	Application of Hofstede's dimensions in the GCC countries and comparison of the recent results to the original ones
Fernandez et al.	1997	7 201 employed business professionals and adv. business students	Reexamination of Hofstede's country classifications in 9 countries
Girlando & Eduljee	2010	Russian students studying in Russia and in the USA and US students studying in the USA	Replication of Hofstede's work using the VSM 94
Huettinger	2008	Over 800 responses from students in Latvia, Lithuania, and Sweden (to calibrate the other scores	Evaluation of scores in 2 new countries using the VSM 94
Kolman et al.	2002	Respondents from Poland, Czech Republic, Hungary, Slovakia and the Netherlands	Evaluation of scores in 4 new countries using the VSM 94
Naumov & Puffer	2000	250 Russian respondents	Application of Hofstede's survey to find out whether cultural values of Russians have changed
Oshlyansky et al.	2001	1 428 students from 9 countries	Replications in a student's context
Podrug et al.	n.d.	128 students from Croatia, Bosnia-Herzegovina, and Slovenia	Evaluation of scores in 3 new countries using the VSM 94
Tipurić et al.	2007	Doctoral and postgraduate students in the field of economics in Finland, Bosnia-Herzegovina, Croatia, Hungary, and Slovenia	Evaluation of scores in 5 countries using the VSM 94
Wu	2006	Employees from US and Taiwanese universities	Replication of Hofstede's study in the USA and Taiwan

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All at sea: Insights into crew work experiences on a cruise liner

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This research explores employee experiences of working on board a cruise ship. Cruise liners have been described as floating hotels; but increasingly they are more like floating resorts, embracing passenger and crew populations as big as small towns. In addition to the usual service sector experiences and emotional labour requirements of service jobs in the hospitality sector, the shipboard context in which employees live and work put considerably further constraints and pressure on crew. This paper reports on these crew experiences, informed by both participant observation and semi-structured interviews with a stratified sample of frontline hotel services staff. For most crew, the relative value of earnings on the cruise helped compensate for being away from home in challenging working and living conditions and work relationships involving colleagues from diverse national and linguistic backgrounds.

Keywords: floating hotels, crew motivation, workforce diversity, living conditions

Introduction

According to Bow (2002), the cruise industry is one of the fastest growing holiday formats within the tourism sector. Despite this growth, limited research has been done on the cruise industry, and specifically on the crew experiences of working and living at sea. Mancini (2011, 3), states that "a cruise is a trip by ship", with staff on board serving passengers who are able to relax and enjoy their time away from the stresses of home. The core focus is on the passenger, providing an enjoyable holiday, not on the transportation itself. Nowadays, cruise lines are building larger ships offering their facilities to a wide variety of customers. The biggest ship in the world can carry approximately 5 400 passengers. Cruise ship passengers represent a broad demographic profile spanning wide-ranging age, geographic, and socio-economic backgrounds (Mancini, 2011). Cruise liner companies actively research customers' preferences because the constrained environment requires active customer engagement – a programme of live shows, leisure facilities as well as bars and dining options are built into the shipboard passenger experience. The passenger is therefore engaged in a total twenty-four/seven service setting.

Whilst passengers yield a potentially rich research field, this paper reports on a study that focuses on crew experiences of working in these floating resorts. Ship design typically prioritises passenger living and leisure areas, and minimises the space devoted to the crew providing hotel and leisure services. Crew have to tend to guests in physically challenging conditions, often working with personnel from diverse backgrounds and cultures; cut off from family and friends, and in off-duty time in spaces that are physically constrained and provide limited opportunities for personalisation. This paper reports on the findings organised around three themes – working conditions – workforce diversity, and living conditions. The research is informed by both participant observation, and semi-structured interviews with a stratified sample of front-line hotel service crew.

Life at sea

Working conditions are an important aspect to consider regarding work experiences on board a ship. Hotel services crew have to face many challenges (Gibson, 2006). The scale of ship operations, living conditions, organisational structures and working at sea present a total institution (Sevcikova & Sehkaran, 2011) in which the ship has overall control over employees, both on and off-duty. Cruise ships are at sea for many days at a time and the impact of the ship's movement adds to the physical difficulties. The pitching and rolling of the ship, slippery surfaces and steep staircases all create extra challenges for crew delivering hotel services to passengers. Besides this isolated environment and the movement on board, working hours can also be a challenge. Cruise ships are twenty-four/seven businesses, meaning that employees are needed at all times. According to Nevins (2008), cruise liner crew have to work for 100 hours a week, with no days off and low payment rates.

Even when hotel services crew are off-duty, they can still be called back to work when needed. Weaver (2005) studied performance experiences aboard cruise ships and focused on the working conditions and motivations of employees. This looked at cruise ship employees working at sea over a three-year period. The study found that during their off-duty time employees are still on board the ship and they are thereby limited in things they can do. Even when in port, employees have little time to explore, and this was identified as a source of dissatisfaction amongst employees. Larsen, Marnburg and Ogaard (2012) also found that these restrictions created

crew dissatisfaction. Interviewees reported that "free time and length of contract" was of significant concern to many of them. Crew members frequently claimed that they were not given permission to go on shore by their supervisors, even during their time off. Cruise ships were said to be "total institution" because time off and time away from work is controlled by the organisation. In addition, crew do not have much privacy, because they share cabins, showers and crew relaxation areas.

There is limited time to contact friends and family and this distance can impact on employee emotions. Weaver (2005) adds that hotel services personnel are not only cruise ship employees, but also typically have responsibilities at home as a partner and a parent. Sevcikova and Sehkaran's (2011) research found, however, that most employees were satisfied about the time off and time to spend on-shore. Gibson (2008) who researched life/work experiences of hotel staff on a cruise ship suggested that management styles and approaches were crucial. When managers were sensitive to crew needs, and maintained a balance for employees between work and time off, and non-work spaces, employees were satisfied with their experiences.

Although cruise-based holidays are growing in popularity, cruise operators do not invest enough in labour market forward planning (Zilbershtein & Spicer, 2011), and often face recruitment difficulties for these new super cruise liners. Weaver (2005) also found that cruise ships are regularly understaffed. Staff shortages create extra challenges for crew, because they are expected to deliver similar service levels as when a ship that has the full complement of staff. Crew therefore sometimes need to work extended hours, and this can cause feelings of exhaustion. Lang (2011) also reflected these results, indicating that reducing the number of crewmembers caused stress due to longer working hours, shorter breaks and hotel crew even being awoken from sleep when staff shortages demanded.

So as to maintain workforce flexibility, many companies do not employ a full-time workforce (Weaver, 2005). Crew employment contracts are often short and not fixed, and this increases the level of uncertainty for employees. The organisation has a ready source of labour when shipboard occupancy rates are good, but have no obligation to employ crew when demand is lower. The study also found that the cruise organisation has power over their lives both when the cruise workers are on board, and also when they are home with their families. Would-be employees are never certain if they are going to be employed until the company staffs up each cruise. Larsen, Marnburg and Ogaard (2012) confirmed that employees felt worried about the recruitment office, having no power in the length of contract and location, but also about the medical tests needed before starting employment.

Cruise lines are international organisations that recruit employees from diverse backgrounds with different nationalities, and cultural backgrounds (Terry, 2011). Hancin (2005, 68) defined workforce diversity as "the differences among employees". These differences can be categorised as differences in age, education, culture (Brownell, 2008), race, ethnicity, colour, religion and gender (Hancin, 2005). Bartz, Hillman, Lehrer and Mauhugh (1990, 321) also add disabilities and work experience as a characteristic of diversity. The study of Secvikova and Sehkaran (2011) found that working with people from different nationalities was a major difficulty for some employees. Key areas of difference were in languages spoken; diverse eating habits, varied perspectives of the world, as well as political and religious backgrounds. Gibson (2008), however, found that some employees enjoyed the multicultural setting on board, and suggested it might provide a good example for land-based organisations.

Cruise ships can employ staff from as many as forty different nationalities on board one vessel (Brownell, 2008). Generally, employees from developing countries are located in the lower-ranked positions. Terry (2011) studied global labour market flexibility and its human resource impacts, focusing on the cruise industry. This found that the employee position in the organisation is highly influenced by ethnicity, race and gender. This research reported upon in this paper confirms that people from similar ethnic groups are working in similar job roles. Crew from developing countries often occupy the lower positions, whilst people from developed countries occupy the more skilled and senior roles. Gibson's (2008) study also indicates that employees in the lowest status roles were mainly from the underdeveloped parts of Eastern Europe, Central America and Southeast Asia. Middle ranked employees were mainly from developing Western or Eastern Europe countries and crew members in the higher status positions employees were from the more developed countries, the United Kingdom and Australia. Zhao (2002), and Secvikova and Sehkaran (2011) also identified this pattern of hierarchical segmentation amongst service crew.

Gender segmentation is also a feature of cruise ship employment. Eighty per cent of the workforce is male. Indeed, there is a perception that working on a cruise ship is seen as "man-work", hard and physically demanding, and thus more suitable for males. Females are represented in service-oriented positions. This is not solely an outcome of cruise line employment policy to hire male-workers for certain jobs, but is also the perception of the would-be recruit about the nature of the job. Hence segmentation can occur before application, with males applying for "men's jobs" and women applying for roles that were either seen as "women's jobs" or gender neutral. Gibson (2008) found that this perceived maleness of the role often results in unfair treatment of women crew by their male counterparts. These perceptions are likely to be a dimension of the cultural diversity of crewmembers. Those originating from more traditional societies are likely to expect male and female work to be different in both status and location.

Flags of convenience make it easier for cruise lines to recruit employees from all over the world. Ships are often flagged in countries with the best economic advantages for the ship owner. Flags of convenience allow cruise operators to be registered in these "flag states" where restrictions on operations, and crew employment protections are minimal. Owners of cruise ships prefer to have limited regulations on working conditions, pay levels, nationalities employed, tax obligations, environmental restrictions and other rules, thereby enabling them to minimise costs and maximise company profits. Other advantages that these flag states offer cover the market value of the ship, conditions of the vessel, operating costs and minimal repairs costs required (Shaughnessy & Tobin, 2006). An American ship that is built in the USA must have at least 75% of U.S. workers, whereas a ship that sails under the Bahamian flag has no rules for workforce nationalities (Terry, 2011). The study of Secvikova and Sehkaran (2011) also

concluded that a ship sailing under a flag of convenience is not bound by wage standards. Employee wages are often very low compared with company national base pay rates. However, many crew originate from low-wage economies and the rates paid aboard can be judged to be good by comparison. Furthermore, there are few spending opportunities for crew whilst at sea, and the money-saving possibility enhances the perception of the pay package for hotel services crew.

In conclusion, the floating hotel nature of cruise ships means that many of these crew working experiences have much in common with land-based properties. Despite the rhetoric that the customer comes first, the primary business objectives are cost minimisation and profit maximisation. Hence management objectives frequently prioritise labour costs management as a way of generating extra profits. Staffing levels that are below the level required for customer numbers and service needs may result in longer customer waiting times and increased complaints. This in turn leads to increased crew workloads and job stress. For cruise ship crew, these contradictions are compounded by the nature of the working environment. The constraining nature of the working environment and limited leisure facilities all increase the work stress experienced by many crew. The literature review, therefore, suggests three dominant themes for research crew experiences aboard – working conditions, workforce diversity, and living conditions

Research approach

The purpose of this research project is to explore the motivations of employees working on board a cruise ship and the impact of management actions on crew motivation. It is suggested that management on cruise ships might gain from a better understanding of employee experiences and the causes of low motivation. There have been a number of studies of employee motivation in the international hospitality industry, but most were within land-based organisations; few have explored hotel service crew on board. Cruise ships differ in many ways from land-based hotels: the size and scale of operations, the scope of services on offer, the profile of passengers, organisational structure, workforce diversity as well as culture and language differences all create major issues for onboard working relationships. As a consequence, it is necessary to explore workforce experiences around three themes identified by prior research and publications – working conditions, workforce diversity, and living conditions.

A qualitative research design was used. The qualitative research approach was adopted because the researcher was looking for explanations, behaviours and experiences of employees. Survey questionnaires did not seem to be relevant for this study, since they do not provide in-depth information. Respondents would be bound by set questions, whereas qualitative research allowed respondents more freedom to express their own thoughts and opinions. Hence numerical data was not gathered .or used but instead descriptions of the employees' motives, behaviour and experiences on board were highlighted. This was judged to be more appropriate for addressing the problem statement, which focused on the motivation and experiences of crew working on board cruise ships. Research questions explored the reasons employees are working on board, as well as the experiences of crewmembers. This included working and living conditions and the diversity of the workforce. There was therefore a focus on the behaviours, thoughts, opinions and experiences of people in their daily operations.

As a participant observer, the researcher was able to witness working arrangements, and the behaviour of managers and crew in context. These observations were supported by semi-structured interviews with a stratified sample of frontline crew. Interview questions were partly structured and the questions were matched to the topic to make sure the data gathered would be useful for the research project (Rubin & Rubin, 2012). The interviewer was open to listen to explanations of the interviewees because they gave a better idea of the interviewees' opinions.

Interview questions were structured, starting with questions on personal background so as to relax the interviewee. Then open-ended questions focused more on the opinion of the interviewee and were more discursive. Themes were related to perspectives about motivation, competencies, hierarchical structure, job satisfaction and communication. Interviews were completed individually, face-to-face with the employees. These were scheduled in advance to make the interviewees feel more at ease. As the researcher was already a member of the workforce, she was known to the interviewees. Interviews were carried out in the spring of 2014 and were completed over several days, according to crewmember availability. All interviews were held in English. As a consequence, interviewee comments reported later are not always linguistically correct but are verbatim transcripts from interviewee statements.

Participative observation was undertaken in the workplace before the interviewing commenced so as to gain more information about crew behaviour in their work setting (Kawulich, 2005). The researcher had a participating role, meaning that the observer was involved into the day-to-day operations, but focused on collecting data. The researcher was working amongst the crew for over eight months and this enhanced the insights from the observations made (Lincoln & Guba, 1994). The workforce was made aware about the author's research.

The researcher made notes of critical incidents related to the research, but these incidents were described anonymously. Field notes were detailed, and included the time and date, and different topics associated with the observation. The researcher observed individual member behaviour as well as crew behaviour in groups. Participant observation allowed the researcher to take note of the actions, words and body language of crew. The observer was also involved in informal conversations with crew both on and off duty (Kawulich, 2005).

Stratified sampling was used to select the participants (Cooper & Schindler, 2008). Six employees were selected. Interviewees were chosen from departments involving different frontline crew work experience: Housekeeping, Food, Beverage, Guest Services, Finance and Entertainment. The interviewees were of different nationalities and had been working for the company for varied lengths of time. None of the interviewees held management positions. There were equal numbers of male and female interviewees.

The interviews were recorded and later transcribed. Notes were also made during the interviews. Pre-planned notes guided the interviewer in asking in guiding the interviews (Rubin and Rubin, 2012). Interviews were transcribed into

Microsoft Word and the transcriptions were structured first by adding similar topics that were brought to the interviewers' attention together. These similar concepts and themes were then critically reviewed to see if they were related to the problem statement and research questions. Then fragments were given a code and unnecessary information was eliminated. After all concepts and themes were coded, the information was analysed further and the process of data reduction followed. Fragments were given categories, known as axial coding (Baarda, 2009). After axial coding, selective coding followed, searching for the main concepts.

Findings

Prior research on crew work experiences suggested a number of themes that need to be considered when examining working life on board cruise liners. Working conditions intensify the experiences of those supplying hotel services to paying passengers. Employment relationships and policies that ensure workforce flexibility for the organisation create uncertainty and inconsistent employment for crew. These experiences are further impacted by the employment of a diverse workforce with different linguistic and cultural traditions, and expectations of pay. Given the realities of the total environment that crew experience aboard these cruise liners, it is also necessary to explore crew living conditions.

Working conditions

The observation of work confirmed the intense nature of the work. One interviewee, the partner of a housekeeping employee, stated that her husband is often very tired after his shift. Embarkation days are particularly demanding; housekeeping personnel have to work a very long day. They clean the rooms in the morning; bring all the suitcases from the arriving passengers on board in the afternoon; and undertake the turn down service in the evening. Another employee from the bar also reported dissatisfaction with working hours. Cleaning was scheduled after each shift and this often took longer than the scheduled hours. Bar staff therefore worked extended hours, with shorter breaks between shifts, resulting in tiredness and exhaustion. Another employee, from the front office, stated that she experienced stress because other team members were not able to do the job properly due to their lack of training and experience. This resulted in the interviewee doing significantly more than others in the team. These feelings of stress were also accompanied by weight loss and anxiety. However, these levels of stress were not universal amongst crew. Employees from some departments, such as entertainment, and even some bar staff were less dissatisfied because the work was better than they could get back home.

The physical working of the ship structures and layout, as well as the movement of the vessel added difficulties for some crew, particularly for those working in the galley, bar and housekeeping areas.

> *Yeah, in that side the job is getting heavier. You know, when the ship is moving and there are a lot drop incidents* (Interview 4, Housekeeping employee, India, male).

Several galley and bar employees stated that they felt that were treated like cleaning machines rather than people.

> *You can work like a machine. You can clean, you can wash, you can do that, you can whatever. They did not care* (Interview 3, Galley employee, Nicaragua, male).

> *They put off the air conditions so the place becomes very, very hot and you still have to clean everything because otherwise you won't finish in time, and the operation stop. So that is very, very challenging because the heating is very, very hot. You are sweating, in one minute start to sweating and you still have to work* (Interview 3, Galley employee, Nicaragua, male).

> *So split shift, it means that you are working four or six hours in the morning and four or six hours in the evening. So, the rest is not properly in that way, because you wake up in the morning, that is OK, but once you finish in the afternoon ... you want ... you have to go to rest. But your body is not feeling going to rest because you know it is like, ehh ... afternoon time. So you have to find a way to try to sleep if you can and otherwise you are keeping wake up and have to come to the next shift and work another four or five hours so in the end you are very tired* (Interview 3, Galley employee, Nicaragua, male).

For others, the working conditions were not considered to be a problem. The following employee was working in the housekeeping section and had been under contract for nine months but did not feel tired at all.

> *Does the amount of working hours and the amount of rest balance each other? Yeah, for me it is fair enough* (Interview 4, Housekeeping employee, India, male).

Crew working in other departments reported having a little more work and non-work balance. For example those working on the front desk area, and in finance suggested they had more rest and did not report heavy working conditions.

> *Well, it is, ehh, some days you are able to sleep more, some days you sleep less. But I mean that happens on days at sea or on land. So for me it is not an issue* (Interview 1, Front office employee, Belize, female).

> *Ehm, I can say yes. Yes. Because there is nothing you can do here on board aside from work of course. Hahaha [laughing]. When you are not on duty all you have to do is take a rest* (Interview 2, Finance employee, Philippines, male).

Salary was a major reason for working on cruise liners, and all interviewees registered this as a key reason for seeking jobs on board. Though the origins of most of the interviewees suggest that the perceptions of these wages has to be set against the potential income back home, and in some cases on the gender of the respondent.

> *Ehm, salary is utmost important to me because of course it is a motivation. You want to, you want to work hard and you want to make good money. You want to feel that you have a very stable life* (Interview 1, Front office employee, Belize, female).

> *Salary for everybody is topmost priority, you know. When you work on the ship especially for months. For me, I am coming from India. I have to fly almost 20 hours is the distance. So, since you are getting a*

better salary than what you get back home that is the reason everybody is over here because the salary is a bit higher (Interview 4, Housekeeping employee, India, male).

Very important. Because this is like ehh ... sacrificing the time with your family. You miss a lot of … so the salary has to be like the ... the ... the ... contra part of the sacrificing (Interview 3, Galley employee, Nicaragua, male).

Most interviewees reported they were supporting their families in their home country. One employee supported her partner by financing her studies. Other employees gave financial support to their wife and children and another employee was just earning for himself, for living. The Indian employee was supporting his parents back home because they took care of him when he was a child. Most interviewees were aware of the sacrifice they were making in relation to the time spent away from families and friends.

I do have a loving partner enrolled in a very advanced educational program which I partially support. So she, apart from my immediate family, is one of the people that I would assist when it comes to financial matters (Interview 1, Front office employee, Belize, female).

Very important! hahaha [laughing]. I mean it is to take care of my family. So it is very important (Interview 5, Bar employee, St. Lucia, female).

By … I already take family responsibility on my shoulders and I have to maintain duties. I cannot joke with my family because they are the one who take care of me when I was a kid (Interview 4, Housekeeping employee, India, male).

So it is very important to have a good salary for the time you spend here without seeing any family members and stay long time working 24 hours, 7 days a week (Interview 3, Galley employee, Nicaragua, male).

The fact of lack of pay during between cruises times was a source of dissatisfaction to these interviewees.

When I am at home, ehm, about the job, well one thing that I don't like when I am on vacation is that I don't have salary (Interview 2, Finance employee, Philippines, male).

The crewmember working on the bar indicated that salary was dependent on sales. The bar staff did have a basic salary and this is topped up with a commission on sales. When the sales are low, only the basic is paid. Therefore, making more sales was important since it enabled the employees to increase their pay. The Spa personnel salaries are also dependent on commissions from sales. Whilst this appears to incentivise employee performance, it can add to job stress because crew are under pressure to produce extra sales, and these are dependent on customers.

Bar department is, if not the only position on the cruise where you (…), job where you basically make your own salary. So the more you sell the more money you make (Interview 5, Bar employee, St. Lucia, female).

All employees stated that time between cruses will be primarily spent with family and friends. Desire for travel during vacation time was not mentioned by anyone. Most crew reported that they try not to think about the job at all when they are at home, because they have been away from family for so long.

OK, when I am on rest time it's, ehh, completely, ehh, its I try not to think about work because that's the time that I may get to, to relax and to, to enjoy the time that I spend with my family and loved ones (Interview 5, Front office employee, Belize, female)

At home on vacation that is the most ehhh, ehhh, interesting part. You get a chance to be with your family for about a couple of months (Interview 2, Finance employee, Philippines, male).

No! When I go home I am not gonna think of it at all. Not one bit. I can promise you that (Interview 5, Bar employee, St. Lucia, female).

Apart from being away from family for so long, the bar and galley employees stated that they are not proud of their job, and one interviewee reported feeling ashamed of doing this kind of work.

It is like a shame work, because in my college and in my family my brothers they know what I do, my close friends and my family, my brothers. But the person, the professional persons that I know ... they do not know because that is something very shameful for me (Interview 3, Galley employee, Nicaragua, male).

Furthermore, the employee from Finance mentioned that he did not feel secure while being on vacation, since the company can always change the contracts, or decide not to re-employ the person. The participant observer also noted that employees did not know if they would have a next assignment after their break. Schedules were sometimes changed without the crewmember knowing.

So ehm we are just got our job for like you sign your contract, so you just got a job for six months and still depends if they are going to hire us again or not. So I don't know how, of course at the back of my mind I am still thinking at the end of my contract: what if this would be my last contract? (Interview 2, Finance employee, Philippines, male).

Workforce diversity

As a participant observer, the researcher noted a significant pattern of labour market segmentation. Crewmembers from the Philippines mostly occupied waiter/waitress, assistant waiter/waitress and hostess positions in the restaurant. There were few Philippine employees in management roles, however, and the exceptions were typically older staff with long service records with the company. The management positions were mostly personnel with a European (United Kingdom, Czech Republic) or American nationality. Comments from crew during informal conversations also reinforced the impression that nationality played a big role in getting a promotion, or recognition from the relevant manager. The observations revealed that some employees were waiting for a long time for promotion, although they were already trained for a more senior job. This impression of favouritism led to feelings

of dissatisfaction and demotivation amongst hotel services crew because it was felt that those who were from similar backgrounds to the manager were more likely to be promoted. That said, where promotions did take place, crew appeared to be more motivated and enthusiastic in their roles.

Apart from these job segmentation issues, working with a diverse workforce did present staff with both positive and negative experiences. Having an international workforce seemed to give opportunities to employees to learn about other cultures. The observer noted several cross-cultural friendships that seemed to be a benefit and comfort to the individuals working together, but evidence of these relationships being continued between cruises was a function of the diversity of origins. The international workforce was experienced as challenging sometimes by the bar employee, since 60% of the workforce were all from one nationality. She also mentioned that it was nice to have friendships and meet guests from different nationalities but that it was just extra, and that salary is the priority, rather than having international friendships as the key motive for working on cruise liners.

> *Well, I actually enjoy it because, ehh, working with a diverse nationality, diverse cultures, you learn a lot (Interview 1, Front office employee, Belize, female)*
> *On a cruise ship it is a different, different life, you know, it is an international life. Working with … different nationalities. You get the option to learn a different culture, different people wherever you come across* (Interview 4, Housekeeping Employee, India, Male).

> *I mean sometimes it is overwhelming because sixty per cent is from the same nationality. But it is OK. In any organisation you meet those that you can't get along with and it is a good thing actually and I have learned quite a lot from people from different countries; things that I wouldn't have known* (Interview 5, Bar employee, St. Lucia, female).

Observations showed that some employees were interested in learning other languages and were planning to visit people in their home country. Besides, the company also prepared food from different countries for crewmembers to try and give them an idea about the food. One employee admitted that he was feeling threatened by being with so many different nationalities. He preferred to hang out with people from his own nationality due to language and similar behaviours.

> *And then you got the chance to get to know them and of course at first I was afraid, really, because back home I also got the chance to work with many nationalities but not that many as you have on board* (Interview 2, Finance employee, Philippines, male).

> *Multi-national workforce, as I said, is always you get different ideas* (Interview 4, Housekeeping employee, India, male).

Having many nationalities was also seen as something useful, since different people bring up different ideas. Also, different ways of greeting, behaviours, language and impressions were seen to be interesting to employees working on board a cruise ship. However, crew members seemed to be acting more sensitively to others, to find out what approach is expected from others in order to gain mutual respect.

> *Especially when you have different cultures you really have to be attentive and you really have to be more sensitive enough to know or to get on well with that person* (Interview 2, Finance employee, Philippines, male).

Observations indicated that employees did not feel offended if a crewmember approached them in a way that was not expected in their culture. The employee from Ukraine clearly confirmed that a multi-national workforce had taught her to be more respectful to other nationalities or races, something that she was not exposed to in her home country.

> *Ah multi-national, I love it! Absolutely! Yeah because it is, ahhh.. it is such a great opportunity to learn to understand other people. And to learn to respect also. Because I came from a society Ukrainian unfortunately we are very racist, racism is very common* (Interview 6, Musician, Ukraine, female).

Having a multi-national workforce can cause language difficulties. Although English was the main language, employees did report that it was sometimes hard to understand the different tongues, or accents, and misunderstandings took place. This could result in crew not working according to management instructions, or tense working relationships.

Communication with the management is OK but communication with my team …oooh… there I have some challenges, because I have different nationalities. Some takes a long time even for them. It is a barrier in language (Interview 4, Housekeeping employee, India, male).

> *I have last year I had Peru guys, Indonesian guys, like I am not criticising, but it is their own nature. Because they are not familiarised with English, so when they come on board and when you tell them something, some tasks, sometimes they don't catch up with it. So, every time when you say something you have to say and show the things, so you waste a lot of time showing the guys the jobs what they are going to do and in the mean time you are losing the tracks* (Interview 4, Housekeeping employee, India, male).

Crew speaking in their native language in front of other crew from different countries could cause suspicion and discomfort. English was deemed to be the official language on board the liner and crew were expected to speak in English in both public and crew areas. The observer noted several instances of disciplinary action being taken when not speaking English.

> *I had an issue about speaking Russian in a crew zone. Some crewmembers came to me and said that it is not nice to speak Russian in the crew area. Because we do not speak Russian and we feel like you speak about us* (Interview 6, Musician, Ukraine, female).

Crewmembers reported experiencing racism or discrimination while working on board the ship. This was said to be experienced in the way people treat each other. This was noticed as well during observations in the workplace.

> *Yeah you could see it sometimes. They try not to make it look too obvious because obviously it is wrong and it is against company policy* (Interview 5, Bar employee, St. Lucia, female).

Discrimination was experienced in the way people dress. Certain nationalities were said to have more privileges than others. Besides discrimination between nationalities, discrimination was also experienced between departments.

Departments with a large group of similar nationalities did not seem to cooperate with other departments with a different group of nationalities. The Galley employee experienced this.

> *But, I sometimes see some people depending on the position that you have or the race of the working, or the department where you are working. They have more consideration than others. They not take care of keeping the things clean, the areas. So, it is like no corporation between departments.(…) Because if they see for example most of the utility Galley are Caribbeans. So, but, if they see one Philippines in the area they take care more about him. But if it is Caribbeans they just don't care about that* (Interview 3, Galley employee, Nicaragua, male).

Moreover, two employees reported different opportunities for growth based upon nationality and/or being friends with managers. Although one of the interviewees claimed there were improvements, he did experience discrimination during the beginning of his cruise ship career. Observations also showed that being friends with management gave opportunities for growth more easily than in cases crew members who were working competently but did not have the same personal relationship with managers.

Living conditions

The physical living space was an issue that gave cruise liner employment a dimension that overlaps with working in live-in land-based hotels, however, the nature of the sea bound context gives this an added intensity. Working and living together constrains the ability to escape work colleagues and the work environment in all live-in settings but the cruiser at sea allows no opportunities for disengagement, and compounds the feeling of being in a totally controlled environment.

> *But when I came in, when I came on board early ehm, I was still surprised because it is really small. And I really couldn't imagine that this is the place where I am going to live for six months* (Interview 2, Finance employee, Philippines).

> *My first cruise I get two different rooms, and both of them are very small. You no cannot walk and in my first room was for two person in the room and the second one was three people. And both of that room one person have to work at a time because two people is too small actually we can't fit together because I am big sized and my room person is big size too so we cannot walk at the same time. We had a connecting bathroom. But in fact the space is very small* (Interview 3, Galley employee, Nicaragua, male).

> *I think I have a closet at home that is bigger than my cabin. Hahahaha [Laughing]* (Interview 5, Bar Employee, St. Lucia, Female)

Observations showed that employees were not just considering the size of the cabin but also the cleanliness. One employee mentioned that she would like to see more developed technological equipment for pleasure inside the cabin. Also, Galley and Finance interviewees mentioned that they were able to play their own video games, watch movies and so on in their free time. Interviews and observations confirmed that the ability to keep in touch with family and friends back home was very important to crew.

> *I call like my parents at least twice a week. Yeah. And ehh I speak with my sister in Skype. And to my fiancé I call every day at least like one hour. So I spend most of my money on that".* (Interview 6, Musician, Ukraine, Female)

> *That would be via, via email facebook ehh of course ehm and even snail mails like the old fashioned receiving mails that would take three to four weeks. I think it means more than just sending quick message for like a minute or so. (…) Ehmm anyway from one to four hours per day".* (Interview 1, Front Office Employee, Belize, Female)

The confined living space and accommodation sharing restricted privacy for crew. Those sharing cabins with others were sensitive to the lack of a personal area that they could call their own, into which they could withdraw when working conditions and relationships demanded it.

> *There is no privacy on board! Not even in your room because you are not there by yourself. There is no privacy on board* (Interview 5, Bar employee, St. Lucia, female).

One of the interviewees was married, and she and her husband were working on board the same ship. The living conditions were seen to be very difficult when being married and living on the ship. There was no accommodation for the couple, compounded by differences in working schedules and vacations. They were not able to regularly spend time together.

> *To be honest it is not easy being married and living like that. It is not. I was even telling my husband that it makes you feel like you are not even married* (Interview 5, Bar employee, St. Lucia, female).

Conclusion

Whilst cruise liner hotel services share many similarities with land-based hotel services, the ship design and the seabound context intensifies the working experiences for frontline crew. Hotel services staff have to cook and clean; serve food and drinks; service rooms and provide guest leisure and entertainment service under physically difficult working conditions. The pitching and rolling of the vessel during bad weather present particular difficulties, but the ship design often prioritises front of house space and minimises areas devoted to crew working, living and leisure time.

This paper reports on a study of hotel service crew working on a cruise ship. The research explored three themes. The first explored how working conditions and the physical structures, as well work scheduling could cause difficulties, particularly where management practices intensified work hours and the work environment. Recruitment practices resulted in job status segmentation, where low status job roles were recruited from less developed economies. As a result, pay rates, although low by developed economy standards, were often deemed adequate when compared to the crew's home-base pay rates. The second theme explored the experience of working with a diverse work force. Whilst this was seen by some as a benefit, as it provided an opportunity to meet people from other backgrounds; for others it caused difficulties because

of language and cultural differences. Finally, crew living conditions were restricted and cramped. There were limited opportunities to relax in a personal space that crew could call their own.

Above all, the findings reported upon here, whilst typical of the findings from other research, also suggests that the work experiences reported here are not an inevitable feature of cruise ship working life. They are by-products of company recruitment policies and procedures at a corporate level; and of shipboard management sensitivity to crew stresses and strains.

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Pining for home: Studying crew homesickness aboard a cruise liner

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Most people can experience homesickness at some time, when they move away from their home base. The experience of working onboard a cruise liner can intensify these feelings, because of the enclosed and controlled nature of work and living space. This study reports on the incidence of homesickness where the crewmembers originate from very different cultural contexts than the one in which they work. Findings in this research suggest that whereas a large number of crew experienced homesickness sometimes, a substantial minority feel homesick very often, frequently or always. Crew homesickness should be seen as important by both shipboard and liner company management because it can ultimately impact on customer service experiences, and can be ameliorated by sensitive management policies and practices.

Keywords: homesickness, cruise-liner, crewmembers, shipboard hotel services

Introduction

All travel, by definition, involves moving away from a home base. As a consequence many travellers experience homesickness as a longing for the people, places and experiences left behind, as well as the need to adjust to a new environment and situation. For crew working aboard cruise liners these longings and adjustments are intensified, because the ship represents a total environment from which it is difficult to escape, and where there are limited opportunities to add personal touches to the new living space. Frequently, crew are working and living in a situation that is very different to their home. The situation in this study was of a North American-owned liner staffed with crew from the Far East.

The paper reports on research undertake by the principal author whilst working aboard a US-owned cruise liner that journey around the Caribbean as well as to Alaska. The research involved the design, delivery and analysis of a questionnaire to a significant sample of crewmembers working in an array of frontline service departments on the cruise-ship. The questionnaire, informed by prior research and published literature, suggested that research needs to explore the extent of homesickness amongst crew, the impact this has on crewmembers, and the factors in crew working experiences that either intensify or ameliorate these feelings of homesickness.

Homesickness

Various definitions of homesickness exist. Van Tilburg and Vingerhoets (2005, p. 83) define homesickness as a "cognitive affective phenomenon with intense wish for geographic and chronological changes". Another definition by Thurber, Walton and the Council on School Health (2007) states that, "homesickness is the distress and functional impairment caused by an actual or anticipated separation from home and attachment objects, such as parents, characterized by an acute longing for home". It emphasises that either the home environment or strong attachments to persons can initiate homesickness. Even planned separations can cause homesickness as well as possibly impacting on an individual's functionality. Hack-Polay, (2010, p. 62) states that homesickness is "the commonly experienced state of distress among those who have left their house and home, and find themselves in a new and unfamiliar environment". For this research, homesickness is defined by combining the key features of these definitions. It is, therefore, the emotional and physical distress following geographical moves, including obsessional, preoccupying thoughts about the home environment, home, life at home, as well as family and friends.

Prevalence

The prevalence of homesickness is rather difficult to assess, as it is not a continuous phenomenon (Hack-Polay 2007, Van Tilburg, Van Heck & Vingerhoets 1996). Homesickness occurs in periodical episodes, barring severe cases in which symptoms are experienced continuously. "Homesickness may strike quite suddenly and unexpectedly, in experienced travelers, or in someone who lives a happy life away from their home country, when exposed to a stressor" (Van Tilburg & Vingerhoets 2005, p. 5). The extent that individuals are experienced in being away from home, or the fondness felt for their life in the new environment, does not seem to matter. Stressors have the power to evoke homesickness in anyone. Fundamentally every crewmember can be affected by homesickness. Experienced crewmembers that have worked aboard cruise liners are as likely to become affected by homesickness as those on their first contract. Homesickness is a phenomenon that occurs amongst all age groups, cultures

and sexes. There is no evidence that demographic factors such as age, gender, social class, or culture have an impact of the proneness to experience the phenomenon (Van Heck et al. 1996).

Geographical moves bring along a series of challenges. It requires individuals to separate from attachment figures and loved homes. In addition, adaptation to new living conditions, lifestyles, roles, habits as well as routines is required. Where the new location has features similar to the home environment, there appear to be lower instances of homesickness (Van Tilburg & Vingerhoets 2005). For crewmembers, the ship is itself very different to their home environment. There are fewer possibilities to escape the work setting, and less freedom than life ashore. Seafarers normally work every day and leisure hours are limited. Cabins are typically shared with one to five colleagues and this allows for limited privacy. Fellow cabin members are typically from different countries and cultures, speak different languages, and have different tastes and interests. There are no opportunities for self-catering, and crewmembers have to adjust their eating and dietary habits to the one provide by the shipboard crew catering service. Finally, the mainstream culture will typically differ from the seafarer's home base. This requires individuals to decide whether to maintain their own culture and traditions, or to adapt their cultural identity to the new context. For crew to operate effectively, basic behaviours, values and beliefs of the mainstream culture need to be learned and practiced, so as to avoid misunderstandings and perceived bad performance.

Fisher (1989) established models summarising the distress caused by geographical moves. She developed five theories, which are not mutually exclusive, that could cause distress. These are attachment and loss; interruption and discontinuity of lifestyle; loss of personal control; role changes; and conflicts (Van Tilburg & Vingerhoets 2005). She suggests that attachment and loss, as well as interruption and discontinuity of lifestyle, are stressors arising due to separation from the home environment, whilst loss of personal control, and role changes, are stressors due to the need to adapt to the new environment. Homesickness and the resulting symptoms are caused by conflicts brought about by the separation, and/or the adaptation processes.

"Attachment and loss" as well as "discontinuity of lifestyle" are conditions that are likely to be features in all crew experiences; because the cruise liner involves travel away from home bases. Similarly, "loss of personal control" can be a source of distress for crewmembers, as the ship environment allows for very few personal touches. Life onboard is not shaped by personal needs and wants, as it might be in the home environment. The possibilities and limitations for individuals are set by the rules and regulations of the cruiser and cruise company. Joining the crew requires individuals to fully focus on work, and that implies that their self-image will require crew to be totally defined by the shipboard role. The personal definition of the individual as a family member or partner in a relationship, become sidelined. The nature of the voyage and the cruise liner context allows limited time for personal life and contact with the home base. Time zone differences, together with costly communication links, limit opportunities to stay in touch with home. Conflicts arise in the thoughts of crewmembers, as their yearning to return home competes with the desire to overcome challenges in the new environment, and to complete the contract successfully.

The individual intensity of distress caused by each of the five elements mentioned and the power of their influence depend on the personal characteristics, character traits and given antecedent situation of each crewmember (Fisher 1989). Van Tilburg and Vingerhoets (2005) also suggest that people differ in their reactions to individual stressors, and this leads to varying responses to the impact of homesickness. Whilst crewmembers engage the same ship environment, their sensitivity to the stressors might differ. Hence one individual may be more impacted by homesickness than another.

Fisher's (1989) multi-causal model of homesickness suggests that geographical moves involve two main difficulties, the separation from the old environment and the process of adaptation to the new environment. Separation from home might cause psychological and physiological disorders and obsessive thoughts about home due to perceived loss and discontinuity of lifestyle. In contrast, the confrontation with the new environment results in either "strain and dissatisfaction or reduced commitment". Strain and dissatisfaction will intensify distress and homesickness and bring about reduced work commitment. On the other hand, increased workforce commitment may reduce or mitigate the feelings of homesickness. Hack-Polay (2007) also confirms that the level to which the new environment is pleasant and supportive will be a determining factor in the extent that international assignees will be impacted by homesickness.

Manifestation

Hack-Polay (2007) highlights the importance of recognising homesickness as an illness. He states that psychological disorders and physical symptoms caused by homesickness can affect the health and welfare of individuals. Physical symptoms resulting from homesickness that have been frequently reported are "gastric and intestinal complaints, sleep disturbances, appetite loss, headache, fatigue and a 'funny feeling in the legs'" (Van Heck et al. 1996, p. 901). Furthermore, cognitive symptoms include missing home, obsessional thoughts about home, negative thoughts about the new environment, absentmindedness, together with idealising the home environment (Van Heck et al. 1996).

Behavioural symptoms manifest as "apathy, listlessness, lack of initiative and little interest in the new environment", together with emotional symptoms including "depressive mood, loss of control, insecurity, nervousness as well as loneliness" (Van Heck et al. 1996, p. 901). Mental and physical symptoms impair an individual's functionality, and business operations may become affected. According to Hack-Polay, symptoms of homesickness impair performance, as individuals could be, "irritable, sad, uncooperative, or lacking initiative and drive" (2007, p. 11). He further states that this could lead to an overall lower business performance and productivity (2007). This view is supported by Deresky (2006), who suggests that psychological, physiological as well as social disorders following geographical moves, for example, the inability to work in a team, lower performances (Deresky 2006). Cognitive, behavioural and emotive symptoms can reduce performances standards by crew, leading to poor service quality and potentially greater customer dissatisfaction.

In turn this is likely to lead to increased complaints, and fewer customer returners. Negative guest experiences may lead to bad stories being circulated in the passenger's culture, and poor public relations that ultimately jeopardise the reputation of the company.

Physical impacts may lead to crewmembers being unable to work leading to shortages in the staffing levels in various departments. As there is no availability of agency or temporary staff whilst at sea, shortages cannot be covered, thereby increasing the workload for the remaining crewmembers and intensified feelings of tiredness and stress of those still working. The extra workload may lead to negative service experiences for passengers, and ultimately to customer dissatisfaction.

Homesickness therefore has the potential to impact on both the crew themselves and on the service experiences of passengers. Each has the potential to generate extra costs and reduced profits to the cruise organisation. Unhappy and homesick crews are more likely to want to cut short their employment aboard, and leave the ship before the contract ends. This has a replacement cost implication that adds to operating costs and reduced profits. Even when crewmembers remain, the psychological and physiological impacts may reduce crew performance levels. In some departments this might cause reduced upselling and lower sales and profits. For frontline service staff the impact of homesickness might lead to reduced service levels and customer dissatisfaction. Increased customer dissatisfaction may impact on the cruise line's reputation; lower repeat business, and greater costs in new customer generation.

The nature and purpose of cruise liners involve crew working away from their home base. This can in turn lead to crewmembers feeling homesick. Published research suggests that all crew are capable of experiencing homesickness, given the right stressors, but that individuals do varying in the impact that these stressors have on homesickness. This research explores three broad themes arising from the literature. The first examines the extent of homesickness experienced by crew aboard this cruise liner. The second investigates the impacts of homesickness on crewmembers, including the physical, cognitive, behavioural and emotional impacts. The third theme reports on the factors in crew working experiences that can intensify or reduce the experiences of homesickness.

Research approach

This research reports on research undertaken by the primary author whilst undertaking a forty-week placement undertaken in the final year of the Bachelor's degree in International Hotel Management at Stenden University of Applied Science in Leeuwarden, the Netherlands. This work placement involves full-time work in a hospitality organisation, in this case, whilst working aboard a cruise liner.

Research aim

The research explores the experiences of homesickness amongst crew aboard a cruise liner.

Objectives

- Identify the extent of homesickness amongst crew.
- Determine the symptoms of homesickness.
- Highlight the extent that feelings of homesickness are due to absence from home, or the different environment that shipboard living involves.
- Identify conditions of shipboard living that intensify or mitigate feelings of homesickness.

A quantitative data collection method was selected as this allowed data analysis of a large sample (Verhoeven 2011). A self-administered questionnaire containing predetermined questions was used as this allowed for a significant proportion of the crew to be studied. Apart from being able to gather data from a large number of crew, the anonymous questionnaire was likely to result in respondents being less likely to give socially desirable answers. As the researcher was a crewmember, it was felt that questionnaire would also reduce the risk of personal influence that might occur with face-to-face interviews (Verhoeven 2011). Given that respondents originated from many different nationalities with differing cultural expectations about emotional openness, anonymity was thought be of particular importance. By distributing self-administered questionnaires within the population on board the cruise liner, there was a good chance of a higher accuracy of responses than with the use of face-to-face interviews (Verhoeven 2011).

The survey contained twenty-five questions and took approximately ten minutes to complete. The questions aimed to explore opinion, behavioural, and attribute variables. The questionnaire design included closed, multi-choice, semi-open, and open-ended questions (Lewis, Saunders & Thornhill 2012). Semi-open questions and open-ended questions were important as they allowed for qualitative responses, and the possibility to capture crew insights not anticipated in the questionnaire design. The questionnaire therefore allowed for quantitative data analysis, but also enabled respondents to expand upon the themes being explored.

Population

The ship's complement was normally one thousand and seventy-eight crew, although over the period of the study (7 September 2013 to 6 April 2014) there were eleven hundred and thirteen individual aboard, due to crew leaving and being replaced. Just over three quarters (76%) were males and just less than one quarter were females. Table 1 highlights the national origins of the crew. Whilst crew originated from fifty-eight different countries, the largest number came from the Far East. The biggest single national group were Filipino, and they with Indian and Indonesian nationals comprised around two thirds of all crewmembers.

Sampling

Random sampling was applied as the research was aiming to gather data from all crew segments (Lewis, et al. 2012). This

Table 1: National origins of crew

National origins	Crew (%)
Filipino	43.5
Indonesian	11.4
Indian	10.9
Other nationals	34.1

included data collected across the intensity of the experience of homesickness – never through to always. A total of two hundred usable questionnaires were collected and analysed. Table 2 reports on the nationality profiles of respondents. There are some small differences between the origins of respondents, compared to the nationality profile of the normal complement; they do broadly reflect national crew profiles.

The gender profile was slightly skewed towards females (36.5%) than to males (63.5%) compared to the typical crew profile highlighted earlier. In part this might be due to the sensitivity of the topic, and male respondents being more reluctant to admit to feeling homesick. Even though the questionnaire was anonymous, some male crewmembers might have just avoided admitting it, by not filling in the questionnaire.

The age profile of respondents confirms that crew tends to be under forty years of age. Eighty-five percent of respondents were under forty years old. Table 3 reports on the breakdown of the age profile of respondents.

Most crew members' home base was with shared with either parents (57.5 per cent); their own children (22 per cent); or with a partner (19 per cent). Whilst some respondents recorded also stayed with siblings, friends and grandparents, most were covered by these aforementioned main categories.

Data collection

The questionnaire was developed in line with the analysis of the literature and was distributed to a large sample size so as to assure reliability and validity of findings. Prior to general distribution, the questionnaire was pilot tested with a group of ten individuals and followed with a short interview with this group so as to evaluate the instrument. This helped to identify improvements in the sequence of questions, the formulation of questions as well as to identify mistakes and gaps (Verhoeven 2011). The questionnaire was introduced with a participation information sheet that gave participants an idea about the importance and purpose of this research, as well as clarifying participant rights and ethical principles.

Internal validity of the research findings was ensured as the sample consisted of randomly respondents from the population (Lewis et al. 2012). The data collection was completed within a short time frame so that respondents took part in the survey while having a similar setting within the ship environment. External validity was ensured, as the randomly selected large sample automatically reflected similar dimensions in the gender and nationality distribution in comparison to the population (Lewis et al. 2012). Confidentiality and anonymity were the guiding ethical principles of this research. As mentioned earlier, the survey was completed in an isolated and quiet place to assure anonymity. Survey questions were designed in a way that individuals could not be identified based on given responses. The survey did not, therefore, include the position of crewmembers nor did it ask for national, regional or city origins.

Table 2: National origins of respondents

National origins of respondents	Crew (%)
Filipino	38.9
Indonesian	15.6
Indian	11.6
Other nationals	33.8

Table 3: Age profile of respondents

Age profile of respondents	Crew (%)
Under 21	1.5
21-30	41.1
31-40	42.6
41-50	11.7
51-60	3.0

Findings

Homesickness is an experience potentially shared by all those who travel away from their home base. For those working on board cruise ships there are limited opportunities to remove themselves from the total environment that cruise ship represents. Whilst at sea, there is no chance to escape from the work environment, and there are also limits on the extent that crew can personalise their living quarters. The paper reports on research undertaken by the primary author whilst undertaking a work placement aboard a cruise liner. It follows broad themes suggested by prior studies by exploring the extent that homesickness is experienced by crew respondents, the physical, cognitive, behavioural and emotional impacts of homesickness; and the impacts of various crew experiences that either intensify or reduce the impacts of homesickness.

The extent of crew homesickness

Most respondents reported that they suffer from homesickness at some point. Whilst homesickness impacts on most crewmembers, the reported frequency and extent varies across the crew in this study. Some reported that they never feel homesick whilst others said they always feel homesick. This reinforces the observations by Van Tilburg and Vingerhoets (2005) that people differ in their reactions to stressors causing the level of homesickness. Results of the survey suggested that just under half (48.7%) of the respondents felt homesick "sometimes", whilst almost three in ten reported that they felt homesick "frequently" (13.1%), "very often" (8%) or "always" (6.5%). Those who were less affected accounted for almost a quarter of all crew. Some stated that they "never" (11.6%) or "seldom" (12.1%) experience homesickness (see Table 4). These different levels of impact by homesickness confirm that individual circumstances are likely to vary in the way they are affected by being separated from their home environment.

Table 4: Reported experiences of homesickness

Crew experiencing homesickness	Respondents agreeing (%)
Never	11.6
Seldom	12.1
Sometimes	48.7
Frequently	13.1
Very often	8.0
Always	6.5

Furthermore, the experience of homesickness at all levels confirms that these feelings are episodic. They intensify and reduce over time and few reported feeling the same way continuously. This is consistent with Van Heck's findings, suggesting that homesickness typically occurs in periodical episodes. Only in severe cases are the symptoms experienced continuously (Van Heck et al. 1996). This research indicated a minority responded that they "always" experience homesickness, that is, on a continuous basis. According to Van Heck, crewmembers that always suffer from homesickness can be considered to be severe cases. These results also suggest that a small minority of crewmembers are severely impacted by homesickness.

The research reported upon here was not based upon a scientific definition of homesickness but was informed by respondents' self-assessment of feeling homesick. Females were more likely than males to report feeling homesick frequently. Male participants were more likely to indicate never feeling homesick. On balance, though, gender was not found to be a major signifier as both males and females reported feeling homesick at some point. At the extremes, those who reported feeling homesick more frequently were more likely to be female; whilst those reporting never feeling homesick were more likely to be male. That said, it could be that the reporting of feelings is skewed by male respondents being less willing to admit to feeling homesick due to self image, and loss of face issues. The findings of Van Heck et al. (1996) suggest that there are no differences between the occurrence of homesickness amongst age groups, cultures and sexes. Observations from this research confirm these findings.

Given the nationality profile of the crew, reported upon earlier, Filipino, Indian and Indonesian members were specifically focused on in this research and responses of crew from these countries were compared within and between crew from other cultures. The results of this research showed that crew from all nationalities sometimes experience homesickness, although trends become visible that Filipinos as well as participants from "other nationalities" feel homesick less than sometimes. Moreover, this study revealed that Indian and Indonesian crewmembers were more likely to report experiencing homesickness at the extremes when compared with other crewmembers. Van Heck's research suggested, however, that there are no differences in the prevalence of homesickness between different age groups, cultures, and sexes (Van Heck et al. 1996). This sample included fewer responses from Indonesian and Indian participants, and this may have impacted upon the results. It is recommended, therefore, that follow-up research is conducted to include a larger sample of Indian and Indonesian respondents.

Homesickness can affect everyone when exposed to the appropriate stressor (Van Tilburg & Vingerhoets 2005). The results of this research confirmed this general tendency, though females, Indonesians and Indians reported being slightly more prone to homesickness. The majority of respondents did not think about quitting due to homesickness. However, the more frequently crewmembers feel homesick, the higher the likelihood that they think about leaving the ship. The increasing occurrence of homesickness also causes the symptoms of homesickness to occur more frequently, or more severely. For some crewmembers, the symptoms are experienced to such a high level that they return home.

Even though, the majority of respondents did not to think about quitting the contract, approximately 35% of participants did think about it, and this should be of concern to the organisation because of the costs associated with crew replacement. In addition, the liner company would face a serious recruitment problem. On this ship alone, approximately three hundred and seventy-seven new crewmembers would need to be hired, based upon an average crew complement of one thousand and seventy-eight. Homesickness therefore has to be recognised as a serious issue for the cruise industry, and one that this company must manage to ensure successful operations in the future.

The manifestation of homesickness

The symptoms of homesickness are manifested in a number of ways. There are physical, cognitive, behavioural, and emotional manifestations of the phenomenon. The respondent in this research were asked to rank these various manifestations using the scale indicated above linked to an numerical scale – 1 = never, 2 = seldom, 3 = sometimes, 4 = frequently, 5 = very often and 6 = always.

Tiredness as well as changes in appetite seem to be more common than other physical symptoms (Table 5), though results did vary between groups, and muscle tension, insomnia and headaches were experienced more intensely by some respondents, though the sample overall registered as seldom experiencing these symptoms.

Cognitive symptoms included increasing thoughts about home, considering life at home as ideal, and feelings of missing home are also experienced frequently, very often or always. These are more commonly thought of than the remaining cognitive symptoms (Table 6).

Few crew reported behavioural symptoms of homesickness. Finding it "difficult to concentrate", and "not wanting to integrate with crew social life", were experienced sometimes. Other behavioural symptoms, such as, "lack of initiative and

Table 5: Reported physical symptoms of homesickness

Physical symptom	Weighted average
Tiredness	3.26
Change in appetite	2.94
Tension in muscles	2.79
Insomnia	2.58
Headaches	2.51
Other aches and pains	2.45
Funny feeling in the legs	2.45
Nightmares	2.29
Gastric and intestinal complaints	1.83

Table 6: Reported cognitive symptoms of homesickness

Cognitive symptoms	Weighted average
Thoughts about home	3.87
Feelings of missing home	3.81
Considering the home environment as ideal	3.36
Negative thoughts about the ship's environment	2.82
Absentmindedness	2.57

drive"; "lack of drive to work in a team"; "lack of drive to be cooperative"; "listlessness"; and "apathy" were all registered as seldom or never by these respondents. In Table 7 it can be seen that all behavioural symptoms obtain a weighted average between two and three which stands for the answer category "seldom" according to the rating scale. The symptom with the highest weighted average is "little interest to integrate into the social life" with a value of 2.69, whereas the symptom "apathy" obtains the lowest weighted average with 2.24.

The most common emotional symptoms reported were sadness, loneliness, and depressive mood, as well as being easily irritable were most frequently reported as being experienced "sometimes". These symptoms were more common than crying, insecurity or nervousness. This is also reflected in the weighted averages reported in Table 8. Sadness and loneliness obtained values above three so that they are on average experienced sometimes and thereby more common than other emotional symptoms.

Comparing the weighted averages of symptoms, including thoughts about home, feelings of missing home, considering life at home as ideal, together with feelings of sadness are the most common experienced amongst crewmembers onboard this cruise ship. As these are of cognitive nature this study revealed that homesickness mostly impacts the mental state of crewmembers. These results are consistent with the findings by Hack-Poly (2012) who defines homesickness as a "cognitive affective phenomenon".

These four common symptoms result from homesickness, and not from other emotional stress; and there is a relation between those four symptoms and the variable homesickness. The more frequently crewmembers suffer from homesickness, the more frequently each of the symptoms are experienced and vice versa. Homesickness and its symptoms can have serious implications for the health and welfare of individuals (Hack-Polay 2007, Van Tilburg & Vingerhoets 2005). In this case, symptoms are typically experienced sometimes, or less often; the majority of crewmembers experience homesickness, but it does not cause serious health and welfare problems. However, approximately 6.5% of crewmembers are seriously impacted by homesickness; so they suffer from the symptoms continuously, and a further 13% report feeling homesick frequently, and 8% very often. Although they represent just over one in four of the crew, their experiences confirm Hack-Polay's (2007) observations that homesickness can have serious implications for the health and welfare of individuals concerned.

Table 7: Reported behavioural symptoms of homesickness

Behavioural symptoms	Weighted average
Little interest to integrate into the social life	2.69
Having a hard time to concentrate	2.62
Lack of initiative and drive	2.46
Lack of drive to work in a team	2.41
Lack of drive to be cooperative	2.36
Listlessness	2.33
Apathy	2.24

Table 8: Reported emotional symptoms of homesickness

Emotional Symptoms	Weighted average
Sadness	3.27
Loneliness	3.19
Depressed mood	2.86
Being easily irritable	2.74
Crying	2.54
Nervousness	2.41
Insecurity	2.36
Nervousness	2.41

Influential factors

Homesickness may be due to either separation from the home environment, or the need to adapt to the new environment, or a combination of both. The literature review suggests that geographical moves bring along a series of challenges. It requires individuals to separate from loved ones and the home setting, whilst at the same time having to adjust to a new environment (Van Tilburg, Eurelings-Bontekoe, Vingerhoets, & Van Heck 1999). In this research, the majority of participants reported that both the separation from the home environment, and the need to adapt to the new environment resulted in homesickness. The calculated weighted averages confirm, though, that separation from the home obtains a slightly higher value than adaptation to the new environment. Hence, the separation processes constitute a slightly greater challenge for crewmembers on board this cruise ship.

The detachment from home and the interruption of life experiences and lifestyle differences result in feelings of loss that bring about feelings of homesickness. Crewmembers who experience homesickness even at low levels of intensity report a sense of loss about the home base and key individuals they have left behind. Missing the company of parents, partners, friends, children and relatives were all mentioned by crew respondents. Adding to this, the change in lifestyle and loss of the certainties of home and living routines contribute to the sense of being separated from home. Indeed all the senses that are engaged in the certainties of the base of origin intensify the grief for what has been left behind are responsible for feeling homesick.

In addition to the sense of loss of the things, experiences and people left behind, the cruise liner represents a different environment. Crewmembers are not only pining for what has been left behind but also having to adjust to a living space that is alien to them. Crewmembers frequently have to work and live in environment where there are limited opportunities for personal space. Having to share living accommodation with other people, from different cultures, speaking different languages, eating different foods, all impact on the sense of disconnectedness.

For crewmembers, working aboard represents a total environment over which they have little control. Respondents in this survey suggested that the lack of control contributed to feelings of homesickness, with 58.7% of participants indicating that they strongly agree (15.5%), agree (20.6%) or slightly agree (22.6%) that homesickness results from reduced control over life onboard compared to life at home. Furthermore, 40.2% of respondents indicated that they slightly disagree (19.8%), disagree (11.1%) or strongly disagree (19.3%) that they were satisfied with level of control they have over their lives aboard.

Table 9 highlights the issues that respondents reported as contributing to the lack of control aboard ship. Often

crewmembers work intensive periods due to the nature of the shipboard services offered to passengers. The cruise is a 24/7 operation and as a consequence crew can be working as many as one hundred hours per week. Shipboard rules and regulations and strict management, intensify the sense of difference in the work environment to which crew have to adjust, and thereby contribute to the sense of strangeness and alienation from home.

Furthermore, the nature of the ship as a total environment is intensified by the encased nature of the ship, the fact that it is often at sea for long periods of time, and in an environment influenced by the ship movement and having to cope with the pitching and rolling of the vessel when weather conditions are inclement. Even off-duty periods are spent on board, so there is no ability to escape. These adjustments to the specific shipboard environment intensify the strangeness of life aboard and the difference to their home base.

Table 10 lists the factors reported by respondents that intensify the feelings of homesickness. Just over one in three (34%) respondents said the living conditions were a contributor to feeling homesick. A negative atmosphere, bad communications, particularly between crewmembers, social isolation, working conditions, and limited free time were all mentioned as also contributing to these feelings.

Table 11 reports on respondents' views of factors that helped to reduce feelings of homesickness. Improved communication links to contact family and friends back home through free Internet links, or reduced telephone rates were all seen as important contributors to improved links with the home base.

More shipboard activities to promote a shared culture and improved social relations amongst crew were also seen as positive and beneficial to making life aboard more tolerable for crew.

Improvements to working conditions were also seen as making a positive contribution to reducing homesickness, shorter duration contracts, as well as reduced working hours aboard were felt to be ways that the cruise company could assist crew in coping with the effects of being away from home.

Table 9: Reported factors reducing control

Aspects of control	Percentage agreeing (rounded)
Long working hours	34
Ship's rules and regulations	22
Lack of privacy	13
Strict management in the workplace	12
Too expensive communication tools	11
Private life/working life too close	6
Partners being sent on different ships	2

Table 10: Reported factors intensifying homesickness

Intensifying homesickness	Percentage agreeing (rounded)
Living conditions	34
Negative atmosphere at work	16
Bad communication links	13
Social isolation	13
Working conditions	11
Limited free time	11
Bad treatment by colleagues	7
Situations reminding of home	7

Table 11: Reported factors reducing homesickness

Reducing homesickness	Percentage agreeing (rounded)
Improved communication links	34
Organisation of social activities	30
Improved working conditions	19
Improved living conditions	8
Improved atmosphere at work	5
Ability to disembark at destinations	2
Family visits	2
Partners on the same ship	1

Conclusion

Homesickness is an experience that can impact on all who travel, but has a particular significance for crew on this cruise liner. The crew is drawn from almost sixty countries, but Filipino, Indonesian and Indian crew accounted for two-thirds of the crew aboard the cruise liner in this study. Their sense of disengagement from home is therefore intensified by a working environment not only constrained by the design of crew accommodation, but also by the diversity of the workforce and international location of the ship.

The research reported upon here suggests that the experiences of homesickness can affect a significant minority of crew. These feelings are in part a consequence of the nature of working on board a cruise liner, but also can be intensified or reduced by the actions of the shipboard management. The management style and treatment of crew can itself be a source of dissatisfaction resulting in more homesickness; but can also lead to crew satisfaction and reduced feelings of homesickness. The paper has suggested that homesickness may result in crew turnover and increased operational costs for the cruise company.

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The cheeseboard in Dutch fine dining restaurants, I: Practices and opinions of restaurant professionals

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The difficulties in serving a cheeseboard are explored in this paper. From literature 1940–2010, for accompanying cheeses, a shift was found from red to white wines and from dry to sweeter wines. There is also a tendency to more and sweeter garnishes with the cheese. Interviews with professionals from nine Dutch restaurants largely confirmed these tendencies. In most restaurants, a varied cheeseboard was offered with sweet breads and garnishes. Many customers only finished the wine from the main dish with the cheeseboard. When a new wine was ordered, it was most of the time a sweet wine that did not match with all the cheeses of the cheeseboard. Recommendations for improving this situation are given.

Keywords: fine dining restaurants, wine-food combinations, flavour profiles, flavour style

Introduction

When enjoying a four or five-course dinner in a good restaurant, and when ordering a cheeseboard as part of the dessert, one will often be confronted with an assortment of four to six excellent cheeses of a widely and wildly diverse flavour profile. The cheeses are mostly presented in order from low to high flavour richness, starting for example with a fresh goat's milk cheese and ending with a very old Gouda or a blue mould cheese. Even if the cheeses themselves are of an impeccable quality, several problems present themselves. In the first place: how does one cope with a fresh young cheese after a game dish, for example? In the second place: what might be the appropriate beverage to go with this diversity of cheese?

The present paper is the first of a series of three that explores these difficulties by providing an inventory of the customs of fine dining restaurants in presenting the cheeseboard and the beverages and garnishes to go with it, leading to proposals for improving the present situation. In the literature review and the discussion, these practices will be placed in a historical perspective and put on trial by the flavour theory of Klosse (1998, 2004, 2014). The second paper deals with achieving a sensible integration of the cheeseboard into the whole dinner and the third paper explores the use of flavour profiles in matching cheeses and wines.

Literature review

In Dutch households, a cheeseboard as part of the dessert is only for a festive meal on a special occasion (Dimarso, 2011). But all the same, the custom has a long history. Some of the most influential Dutch culinary journalists have occupied themselves with the cheeseboard, the way of presentation and the beverages to go with it: J.W.F. Werumeüs Buning (1891–1958) and Wina Born (1920–2001). Their ideas about the cheeseboard will be presented here, together with the ideas of others. In 1940, Werumeüs Buning (n.d.) made a plea for taking some cheese after the main dish, in the essay "Kaas na tafel" (Cheese as a dessert, p. 122–128). He gives much advice for a variety of breads; he explicitly mentions butter as a necessity; he pleads for both Dutch and foreign cheeses. As for the wine, he mentions the simple solution of having the cheese to finish the wine that was served with the main dish. For a festive meal, he suggests coming up with "the best bottle". His advice about the wine to choose is summary: he highlights the principle that wine and cheese should match, but gives just a few examples: "A Roquefort flatters a full-bodied wine but it murders a light claret" (p. 125).

Wina Born (1968) does not specify the composition of the cheeseboard. She recommends in the first place French bread to go with the cheeses, and besides other kinds, like rye bread, knäckebrød and crackers. Further garnishing can consist of nuts, grapes and raw celery. Butter is an option but not a necessity. She gives fairly detailed wine-cheese combinations, with predominantly red wines. The white wines are limited to young cheeses of low flavour richness.

Sander (1968) gives the most detailed suggestions for the cheeseboard. It should consist of three to five different cheeses, presented in the order from low to high flavour richness. He gives several examples. Not all his cheeseboards start with fresh cheeses; the lightest one may be Brie, for example. He advises to compose the cheeseboard in such a way that one appropriate wine may be found. Basically, the bread should be French. However, in a table he gives many suggestions for specific bread and cheese combinations. He never mentions butter. Other garnishes are limited to grapes. He makes suggestions for appropriate wines for 65 cheeses. Red wines are dominant (the best choice for 39 cheeses), red or white (18) and only white (8). According to Sander, therefore, in the 60s in the Netherlands, white wine with cheese was the exception, red wine the rule.

Van Es, Stuit and Kruik (1973) likewise recommend three to five different cheeses, presented in the order from low to high flavour richness. They prefer a cheeseboard from just one country. They think butter is not necessary for a cheeseboard as dessert, although they admit that opinions vary.

The bread should be primarily French, but other kinds might also be useful. Further garnishing can consist of olives, cucumber, celery, grapes and nuts. They advise just one wine; for their three examples of cheeseboards, this is invariably a rather heavy red wine. They advise white wine only for fresh, goat and hard cheeses.

Eekhof-Stork and Bailey (1976) explicitly recommend building up the cheeseboard from different types: at least one soft white mould cheese, one hard or semi-hard and one blue-veined cheese and preferably also a fresh cheese. They give suggestions for nine cheeseboards, from three up to 11 different cheeses. They do not give any suggestions for bread and garnishing. Their wine suggestions are very limited. They explicitly warn against sweet wines. They consider the Stilton-Port combination as coming from social prejudice; in their opinion, the tastes do not belong together.

Matze (1984) limits herself to Dutch cheeses – an obvious choice for a booklet ordered by the Nederlands Zuivelbureau (Dutch Dairy Office). She recommends for a dessert three to six cheeses, to be eaten in order of increasing flavour richness. Bread should be varied: rye bread, French bread, Knäckebrød, crackers. Butter is a must (not surprising in a booklet by the Dairy Office). She mentions that the cheeseboard should be used to finish the wine, without giving any advice for the composition of the cheeseboard. Red port can be an alternative. She does not further specify which cheeses should be chosen with this wine.

Klosse (1998) does not give any hard and fast rules for the composition of a cheeseboard; a cheeseboard with widely different cheeses is just one of the many options. Nor is he specific about bread and garnishings. About the wine, he is very explicit: different cheeses require different wines. He gives some examples:

- Soft red bacteria: Gewurztraminer or old cream sherry
- Blue mould: Botrytis sweet wine.

With a mixed cheeseboard he considers a New World Chardonnay as the best compromise – but a compromise!

Although the first edition of the classical Dutch household cookery book by Wannée was published in 1910, the advice in the 27th edition (Wannée and Scheepmaker, 2005) is clearly by the second author, Anne Scheepmaker, and therefore characteristic for the beginning of the 21st century. Actually, Wannée (1910) did not give any advice about the cheeseboard as dessert. Scheepmaker is in favour of variety: four to six different cheeses, in progressive order of taste. For a minimum, one neutral, soft cheese, one white mould, one red bacteria and one blue mould. She doesn't specify anything about bread and garnishes, and the wine advice is summary: light red wine.

Looking back from 1940 to the beginning of the 21st century, the advice of Dutch experts looks fairly stable and uniform: four to six different cheeses, of different types and therefore of different flavour intensity, to be eaten in the order from low to high flavour richness.

Garnishing is primarily bread, with a strong position for the French bread and some use of other types of bread.

Gradually, butter loses its position on the cheeseboard. While Werumeüs Buning (n.d.) is still strongly in favour of butter, gradually, with Born (1968) and Van Es et al. (1973) it becomes optional or even unnecessary.

Other types of garnishing gradually come up; Werumeüs Buning does not mention anything but bread and butter, but since 1968 some other items like grapes, nuts and celery are given, perhaps at the expense of the butter.

From 1940 to 2005, red wine is dominant. Sweet wines, with the exception of port, are not mentioned or even declared undesirable.

Werumeüs Buning, Born and especially Sander agree about the desirability of specific wine-cheese combinations but only Sander gives a very elaborate table. They are rather taciturn about the right wine with a mixed cheeseboard.

Klosse is exceptional with his choice of white wines and sweet wines. This stems from the theory he developed about flavour. This theory will be briefly explained in the next section.

International literature from the first years of the 21st century yields a picture that is closer to Klosse (1998) than to most Dutch literature from the second half of the 20th century. Beckett (2009, 2012) proposes harmony between cheese and bread: heavy cheese requires heavy bread, e.g. sourdough or rich in herbs. She pleads for other garnishes according to the season: in spring a fresh garnish like herbs or leafy vegetables, in summer fresh fruits and vegetables, such as berries, melon, apricots, tomatoes or paprika, in autumn apples, pears, grapes, figs and nuts and in winter dried fruit such as raisins. Likewise, she pleads for a balance between cheese and beverage. Other beverages than wine can be taken, all in accordance with the flavour profile of the cheese: sparkling wines, port, sherry, cider, Pommeau, apple brandies, beer, whiskey, rum, grappa, gin, jenever, sake, tea, sodas and juices fit all well with a specific cheese.

Werlyn (2003) gives detailed suggestions for cheese-beverage pairing – approximately as detailed as the Dutch author Sander (1968):

> *Light wines can be matched with light cheeses: goat's or sheep's milk cheese blend well with, for example, a chenin blanc.*
>
> *Acidic white wines need acidic cheeses, e.g. a chèvre would do justice to a cool-climate sauvignon blanc.*
>
> *Low acid wines should be paired with lower acid cheeses. It can be narrowed down to a neutral chardonnay from California, in combination with a neutral cheese such as Gouda.*
>
> *Strong, characteristic wines need an opponent matching their strength. A Syrah or Rhône red will pair well with aged cheddar.*
>
> *Sweet dessert wines marry well with salty, strong cheese such as blue-veined cheeses.*

Like Klosse (2014, p. 230–236), Werlyn criticises the idea of pairing wine and cheese from the same region. However, cheese and beverages from different regions, even different nationalities, do not fail to match up with each other. For example, the Pourriture noble wines or *vins doux naturels* are hundreds of kilometres away from excellent cheese matches.

Harrington (2008) comes up with suggestions that are much in the same line as those of Werlyn. Additionally, he gives suggestions for beer and non-alcoholic beverages. With a varied cheeseboard he advises wines that are generally

cheese-friendly, like wines made from pinot noir (red) or an off-dry Riesling (white). On the other hand, hard cheeses can cope, according to him, with almost any wine.

When finishing the wine accompanying the main dish with the cheeseboard, the match between wine and cheese may not be what one should wish. Also, cheese with low flavour richness after a main dish with high flavour richness is not attractive either. Schulp, Gerritsen and de Leeuw approach this problem in the second paper of this series.

In enjoying food and beverage, flavour plays a key role. The flavours of foods and the perceptions of humans, however, are hard to describe. The work of Klosse (1998, 2004, 2014) on this problem has resulted in the model flavour style cube (FSC) in which two dimensions are related to the mouthfeel: coating or contracting. The third dimension is the flavour richness. Contracting is a mouthfeel that stops the saliva flow; examples of tastes and foods with this effect are salt, acid, many fresh fruits and vegetables; also tannins in vegetables or wines. Sweet, fatty and umami substances cause a coating mouthfeel: substances of these kinds leave a thin layer in the mouth. A special case of a contracting mouthfeel is "dry": substances that make the mouth dry by absorbing saliva, like toast or rusks, or by coagulating saliva, like tannins (Klosse, 2014, chapter 3, p. 61–84). The flavour richness is analogous to sound intensity or light intensity. Flavour richness, unfortunately, cannot be expressed in unambiguous units like dB for sound and candles for light, because flavour has a variety of causes. From the FSC model, Klosse derives eight basic flavour styles, as summarised in Table 1.

In Klosse's own words:

> *This model is a depiction of the world of flavour and serves as an instrument for classification. It doesn't imply that there are only eight flavours left. Compare this to light for example. The flavour styles correspond to the colours of the rainbow. Every colour has many shades and they fade beautifully into each other. There is an obvious difference as well. The exact position of any colour is precisely known. If you go to a paint shop or a printer you can give a number to get the desired colour. In flavour we are as yet nowhere near such exactitude. It is even hard to conceive that we would ever get to such detail (p. 74).*
>
> *Flavours are further distinguished into two flavour types: fresh and ripe. It is not easy to grasp these two concepts clearly, but examples will help. When comparing the (botanically closely related) fruits apple and pear, then the apple is fresh; the pear is ripe. In herbs and spices: chives, dill, tarragon and chervil are fresh; thyme, rosemary, basil and tropical spices like mace, clove and vanilla are ripe (p. 69–72).*

Using these concepts together, it is possible to create a flavour profile of a given food or beverage. One or more tasters score for the elements coating and contracting (mouthfeel), flavour intensity, ripe and fresh. Other elements can be added, like dry, and the five basic tastes.

Applying these views to cheese-wine combinations, for many cheeses that are coating, wine rich in tannin is far too contracting to give a good harmony. This explains why a cream sherry, with high flavour richness, ripe tones and a coating mouthfeel gives the best harmony with a red bacteria cheese. This is just one example out of many.

In the first part of the literature review we saw a shift toward sweeter wines and sweeter garnishes since the '90s. Partly, it may be explained by a "sweeter tongue" with many consumers. The increased sugar consumption, worldwide and in the Netherlands, may contribute to this development. According to CBS (Centraal Bureau voor de Statistiek) between 1950 and 1980 the per capita sugar consumption in the Netherlands increased from 35.4 to 41.9 kg. According to Kenniscentrum Suiker en Voeding (Expertise Centre Sugar and Nutrition, 2014), total per capita sugar consumption was 44 kg in 2010; 26 kg were so-called added sugars: sugars that are added to industrial foods like soft drinks, dairy desserts, chocolate, jam, cookies and sweets. Increasingly, sugar is added to products where one wouldn't expect sugar (www.suikerwijzer.nl, 2010): bread, meat products, mayonnaise, gherkins or canned soup. Klosse (2014) indicates that the addition of sugar to products will have consequences for the wine to go with it: generally, more residual sugar will be needed in the wine (p. 85).

Methodology

Owners and staff members of nine fine dining restaurants were interviewed about their practice of serving the cheeseboard. The restaurants were chosen from the authoritative Dutch restaurant guide *Lekker* ("Delicious") that for more than 25 years has presented reviews of the best 500 Dutch restaurants. The selection of the nine restaurants was also based upon location, close to Stenden University or the home of some of the authors. The interviews were held in 2012; some of the restaurants meanwhile have changed location or format. The restaurants are listed in Table 2.

The respondents were interviewed about the following topics:

- What is the place of the cheese course in your restaurant?

Table 1: The basic characteristics of the flavour styles. Derived from Klosse (2014), Table 3.2 p. 75.

Flavour style	Primary flavour dimensions			
	Contracting	Coating	Flavour richness	Description
1	Neutral	Neutral	Low	neutral, light
2	Low	High	Low	round, smooth, supple, creamy
3	High	Low	Low	fresh, sour, contracting,
4	High	High	Low	can be eaten/drunk continually, simple
5	Dry	Dry	High	Robust, solid, powerful
6	Low	High	High	Full flavour, ripe flavour, filling
7	High	Low	High	Pungent, spicy, hot, explosive
8	High	High	High	Complex, differentiated, subtle

Table 2: Information about the respondents

	Name and location	Persons interviewed	Remarks	Abbreviation in text
1.	Restaurant NL, Leeuwarden, province of Fryslân	Executive chef Mr. Albert Kooy, SVH Meesterkok	Stenden University restaurant; since October 2014 the name is Wannée	NL
2.	De Nieuwe Mulderij, Leeuwarden	Henk Markus, chef-owner	In 2013 moved to Heerenveen under the name Het Ambacht	NM
3.	De Waard van Ternaard, Ternaard, province of Fryslân	Michaël Roest, executive chef, and Mathilda Broekstra, sommelier		WT
4.	Librije's Zusje, Zwolle, province of Overijssel	Debbie Winkes, headwaiter	Moved to Amsterdam in 2014	LZ
5.	De Bokkedoorns, Overveen, Province of Noord-Holland	Eva Rodenrijs, headwaiter, and Ruben Kwakman, sommelier		BK
6.	Long Island, Hoofddorp, Province of Noord-Holland	Mrs. Brinckmann, headwaiter		LI
7.	By Ús, Leeuwarden	Owners Douwe van der Lei and Ypie Tjeerdsma, chef and headwaiter respectively		BU
8.	Eindeloos, Leeuwarden	Willem Schaafsma, chef-owner and Jorrit Bokma, headwaiter		EI
9.	Mes en Vork, Hoofddorp	Ilse Schijf, headwaiter		MV

- How do you present the cheeseboard? To what extent can the customer influence, by his or her preferences, the composition of the cheeseboard?
- What do you do to make the cheeseboard profitable?
- What is the origin of your cheeses and where do you source them?
- What garnishes, including bread, do you serve with the cheeseboard?
- Which wines or other beverages do you serve with the cheeseboard and actually recommend to your customers? And how do your customers react to your recommendations? How flexible are you to meet their specific wishes?

The interviews were recorded and summarised. Afterwards, interviews 1–5 were analysed and a summary was created; later on, the same was done with interviews 6–9. A total analysis and integration was done afterwards.

Results

In this section, a summary of the nine interviews is given. Restaurants are designated by the abbreviations as given in Table 2.

1. Place of the cheeseboard

All respondents agreed that the cheeseboard is part of a multi-course dinner, after the main dish and before the sweet dessert. BU and LZ also mentioned the possibility that the cheese could be the last dish, especially for customers who don't like sweet things or at any rate prefer cheese above sweet. NL, WT and BK explicitly mentioned the transition to sweet by special new flavours after the main dish. WT, BK and BU mentioned their own liking of cheese and therefore, their enthusiasm to serve it. Additionally, NM considered the cheeseboard as a means of profiling the region by serving regional cheeses.

2. Presentation of the cheeseboard

Here there is an important distinction: BK where they use a cheese trolley, and all the others where they did not at the time of the interviews. LZ used to have a trolley, but they have given it up because of cost. EI was temporarily without a cheese trolley. Customers in LZ can still state their preferences, and then the cheeseboard is made up accordingly in the kitchen. In all other restaurants, a standard cheeseboard is prepared in the kitchen. In VM, BU and LI, customers can indicate that they would rather not have a certain cheese; they will receive a bigger portion of one of the remaining cheeses. Ready prepared cheeseboards are presented on rectangular platters or on a rectangular piece of slate (VM). NL gives three different cheeses; the other restaurants mention "varied", which ranges between four and six. BK has 40 cheeses on the trolley; in practice, the customers will select three to five different cheeses. Only EI mentions the logical order between main dish and cheeseboard; however, due to the limited stock of cheeses, the ideal order is not always possible.

3. Profitability of the cheeseboard

Here, the answers varied greatly. Cheese is expensive and especially the softer cheeses are prone to spoilage. All respondents described their careful keeping practices of cheese.

NL, NM, LZ, EI and VM reported a very low profitability on the cheeseboard; in contrast, LI, BU, WT and BK were satisfied or even very satisfied. BK explicitly mentioned the great sales effort of the waiting staff as a crucial factor in the high profitability. To a lesser extent, this was also the case with LI, BU and WT. Keeping only a limited stock (five different cheeses at LI, eight at BU and EI and "not many" at VM) is an important factor to limit losses and thus increase profitability.

4. Origin and sourcing of the cheeses

NL, NM, WT, LZ and BU serve (almost) exclusively Dutch cheeses; they give extra attention to Frisian cheeses; BU even

has nothing but Frisian cheeses. These restaurants try to avoid the trodden path of the "well-known names". Only WT buys a considerable part of his cheeses directly from the local producer. All other restaurants use the services of a wholesaler. EI mentions Michel van Tricht, an authority in the Benelux and also a cheese writer.

5. Bread and garnishes

BK takes a radical stance. Basically, they do not serve any garnishes. "The wine should be the garnish". However, in case the customer asks for bread, dark brown bread with seeds and dried fruits is served. LI, BU, EI, NM, WT and LZ explicitly mention the role of bread and garnish as providing contrasting or complementary flavours and textures. NL mentions the role of bread – the only garnish – as weakening the intensity of the cheese.

The greater part of the garnish is on the sweet side, and also the bread contains sweet elements like figs or raisins (VM, EI and LI). BU gives a regional turn to the sweet bread by serving Frisian sugar bread. Besides sweet breads, bread with nuts is served (LZ). Other sweet components are apple pear syrup (EI, LZ, VM), honey (BU) or fig jam and apple jelly (LZ), apricot compote (LI). EI explicitly states: "Guests are very used to receiving something sweet with the cheese". Some less sweet garnishes are unprocessed fruit like grapes (LI, WT) or apple and pear (NM). They mention this because they plan also to give non-sweet, savoury garnishing like celery.

7. Beverages with the cheeseboard and customer reaction

NL, BU and WT mention finishing the wine served with the main dish. All other restaurants sell a special wine or other beverage with the cheese. Mathilda Broekstra (WT) clearly sees the problem of a varied cheeseboard: "If you really want to it the right way, you should serve a different wine with each individual cheese". Implicitly, other respondents share this opinion, but they consider it as not feasible. Only EI sometimes serves several beverages in small amounts. Part of the attraction and profitability of the cheeseboard is in the possibility of additional sales of beverage. However, the customers' capacity for absorbing wine is not unlimited. Therefore, some restaurants experiment with low alcoholic or alcohol-free drinks. EI mentions Carpe Diem Quince. The recommended alcoholic beverages are generally on the sweet side: Banyuls, cream sherry (BU), Port or a specific red wine (EI), Macvin du Jura (LZ) or Pineau des Charentes (BK). LI states that, due to the narrow assortment of cheeses, they cannot adapt the cheeseboard to the wine chosen by the customer. Therefore, the customer must make do with an optimal recommendation of the wine. BK clearly has customers who want to pay attention to the best combination, but even here, most customers just go for a glass of port.

Discussion

From the literature review, it is obvious that sometime in the '90s the preferences around the cheeseboard changed dramatically: doing away with the butter, sweetening the bread, ending the dominant position of red wines, the white wines served instead being sweetish or very sweet.

This change can only be explained by a combination of factors.

One factor may be the "sweeter tongue" of many consumers apparent from direct sugar consumption (CBS, 2014) (Centraal Bureau voor de Statistiek) and the increase of so-called added sugars, both to obvious and not-so-obvious products. (www.suikerwijzer.nl (2010). Sweeter food demands sweeter wine (Klosse, 2014, p. 85).

A second factor may be the increased insight into flavour and into the role of mouthfeel (see Klosse, 2014). Considering that many cheeses are coating due to the high fat content, the presence of many umami components and the changed structure of the casein, a coating wine for many cheeses is the obvious choice, thus breaking out of the routine of having contracting, astringent, tannin-rich red wines with the cheese. These coating wines may be rich in umami (Klosse, 2004, chapter 6) or not altogether dry or outright sweet. In addition, many cheeses are stronger on the ripe than on the fresh tones, requiring wines of corresponding flavour profile.

At the same time, there are also fresh, acidic cheeses: more contracting than coating and with more fresh than ripe tones. Many young goat's milk cheeses are in this category, together with Frisian fresh ewe milk cheese, Boursin and Meikaas. These cheeses are better off with a rather contracting white wine.

From this perspective, there is a contrast between the practice in the majority of the restaurants in the present research and the recent literature like Klosse (1998), Beckett (2009, 2012), Werlyn (2003) and Harrington (2008). In the first place, there is the follow-up between the main dish and the cheeseboard. Often, this main dish has high flavour richness and the coating element in mouthfeel is stronger than the contracting. In most restaurants, the cheeseboard starts with a light fresh cheese that would be best off with a light, dry, contracting wine. Actually, the cheese has to cope with the remaining wine that in most cases will have high flavour richness and tannins. Also, after the main dish, the light first cheese will be an anti-climax (see the next paper, "Integration of the cheese course into the menu").

In the second place, it is hard to find one acceptable wine with a varied cheeseboard as served by most restaurants. Even if the compromise of New World Chardonnay (Klosse, 1998) might be acceptable, the higher flavour richness of the preceding wine might make this compromise less viable. The sommelier of WT admitted this explicitly: an appropriate wine with each individual cheese. But both the cost and the quantity of alcohol would not be acceptable to the customer. The practical choice, therefore, would be to decide first what wine the customer should like and to create the cheeseboard accordingly. Here, the cheese trolley is a valuable asset, provided that the waiters are expert on their cheeses and on wine-cheese combination. Most likely, they also need to combat the propensity of many customers "to want it all". The combination of expertise, salesmanship and tact will pay itself out by generating extra beverage sales, as the practice of BK demonstrates, where the cheese trolley is very profitable in itself.

As for the garnishes, the shift to sweeter things to go with the cheese can also be explained from the "sweeter tongue" and the need for more coating accompaniment of the cheese. At the same time, then, it is hard to explain why the butter with the cheese has almost disappeared: butter will add to the coating character of the cheeseboard.

Finally, the factor "fashion" should not be underrated: the "sweetening" of the cheeseboard around 2000 can partly be a matter of restaurateurs imitating each other.

Recommendations for industry

To increase the profitability of the cheeseboard, both by stimulating total sale and creating extra sale of beverage, the education of staff is crucial, as stated in the discussion.

Waiting staff should be able to advise the right cheese and beverage after a given main dish. Limiting the choice of cheeses, e.g. to only a variety of blue mould cheeses with a *vin doux naturel* might be a viable option.

Gently discouraging the practice of "*finir le vin*" (taking the cheese with the last half glass of the main dish) will be a good thing from a gastronomic and commercial perspective. Exploring the possibilities of alcohol-free beverages with the cheeseboard will also stimulate sales while limiting the alcohol consumption of customers, especially drivers.

Recommendations for further research

Two lines of research can be recommended. The first is further analysis of cheese and wine combinations. Much has been done, more needs be done. The second would be a close monitoring of restaurant practices in serving the cheeseboard. This might shed light on the fashion element in changes that no doubt will occur.

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The cheeseboard in Dutch fine dining restaurants, II: Integration of the cheese course into the menu

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In Dutch fine dining restaurants, the customer who orders a cheeseboard as part of the dessert is served an assortment of cheeses without regard to the dishes that preceded the cheese. The present paper tries to contribute to a more logical order of main dish and cheeseboard. A panel of 12 tasters judged the order of 6 cheeses with three dishes: vegetarian, beef, fish. The most appreciated cheeses were different for each dish. A good match in flavour profile between the dish and the best follow-up cheese was found.

Keywords: Fine dining restaurants, menu structure, flavour profiles, flavour styles

Introduction

As stated in the first paper in this series, "Practices and opinions of restaurant professionals", the customer who orders a cheeseboard receives a plate with five or six different cheeses, ranging from young and fresh to blue mould cheeses and old hard cheeses of high flavour richness. Generally, restaurants do not take into account which dishes preceded the cheeseboard. One should not be amazed at being served a light young goat's milk cheese after a game dish. The present paper explores if it is possible to integrate the cheese course in a more meaningful way into a menu than the usual approach. The hypotheses to be tested in the present research are:

1. Different main dishes would be best served by different follow-up cheeses for the dessert
2. The flavour profiles of a main dish and the most appropriate follow-up cheese are close to each other.

Literature review

In enjoying food and beverage, flavour plays a key role. The flavours of foods and their perception by humans, however, are hard to describe. The work of Klosse (1998, 2004, 2014) on this problem has resulted in the model Flavour Style Cube (FSC). This model has briefly been presented in the preceding paper, "Practices and opinions of restaurant professionals". Also, two important elements of a flavour profile, ripe and fresh tones, have been discussed there.

The problem in the present paper: "Are certain cheeses preferable over others to follow certain dishes with a given taste profile?" can be answered on different levels. First, we approach it from the perspective of everyday life, as described by J. W. F. Werumeüs Buning (1891–1958), a Dutch poet and a journalist who can also be considered as the father of culinary journalism in the Netherlands (Hijmans, 1969, chapter XI, p. 41–45). His essay "Kaas na tafel" ("Cheese as dessert") (Werumeüs Buning, n.d. p. 122–128) states in the first place that, in contrast to France, cheese as a dessert with a domestic meal was as unusual in the Netherlands around 1940 as it is now common. His proposal is that between the main dish and the dessert, e.g. fruit, there should be the quiet moment for something in between, i.e. some cheese. "For what in the world is more enjoyable than a half-cleared table with cheese, nuts, fruits and the last strains of conversation? And the last good glass?" (p. 125). Werumeüs Buning argues for butter with the cheese, for appropriate bread, for the right wine and for a catholic choice of cheeses, neither only Dutch, nor only French, but always of good quality and with a relationship to the preceding dishes. To him, the transition from the main dish to fruit or a sweet dessert is often too abrupt: "I should prefer a rusk or a slice of rye bread with cheese, and a cup of coffee to conclude, and in between playing with an exquisite apple or pear" (p. 125).

Several researchers on sensory perception have also worked on the effects of the order of tasting in a scientific and systematic way. Something tasted after an item with high flavour richness has lower perceived flavour richness than something tasted after a substance with low flavour richness (Schifferstein & Oudejans, 1996). Zellner, Kern and Parker (2002) did something similar when they compared the appreciation for an item after something else of a higher or a lower quality (although quality in food is an elusive concept itself!). They found that the appreciation for a lower quality item was significantly lower after a high quality item than after something of a lower quality, and that an item tasted on its own would get the right appreciation. Valentová and Pokorny (1998) studied the intensity and acceptability of substances in terms of the basic tastes before and after the panel members had taken oil in the mouth. For salty, the differences were not spectacular, but the intensity of sweet showed a very marked decrease, and the acceptability of acidic increased. Studies of this type confirm the long-standing experience of the food service industry and home cooking, that the sequence of dishes

matters. However, in the natural setting of a meal things can become more complex.

Methodology

Data collection proceeded as follows: the authors conducted three tasting sessions with a panel. In each session, the panel members judged the acceptability of six follow-up cheeses for a main dish of a given flavour profile. The authors selected the dishes and the cheeses and established in consensus the flavour profiles of each, and derived the flavour style according to Klosse (see the previous paper, "Practices and opinions of restaurant professionals" for a description of Klosse's views).

The dishes (Table 1) were:

1. Chateaubriand with red wine sauce and fried tomatoes. Wine sauce and tomatoes provided the contracting element in this dish ("Meat")
2. Trout "en papillote". A fresh cream cheese was added to the fish for fresh tones and extra coating mouthfeel ("Fish")
3. Quiche of green asparagus with truffle mayonnaise. The mayonnaise provided the coating element and part of the fresh tones ("Vegetarian").

For the selection of cheeses, the authors used Koster (2000) and Callec (2001). The six cheeses selected were: Skaepsrond, Roccolo, Lady's Blue, Aged Farmhouse Gouda, Dutch Ricotta and Petit Langres. Some characteristics of the cheeses are in Table 2. Table 3 gives the flavour profiles and the flavour style of the six cheeses.

The panel consisted of 12 members. The authors were not part of the panel. Panel members were Stenden Hospitality Management students, and chefs and waiting staff from restaurants in and around Groningen. The tasting sessions were held in the home of one of the authors in Groningen in May 2013, on each occasion at the same time of the week. In the first session the panel members were given an introduction about flavour and the factors of the FSC model. After an explanation of the outline of the test, the panel members tested the suitability of the six cheeses (Table 2) after the meat dish (Table 1). Each panel member received a scorecard and a plate with the six different cheeses. The panel members did not receive any information about the cheeses, in order to prevent prejudices. Each member received the dish, and after a bite of the meat dish a piece of cheese was taken. On the scorecard each panel member should rank each cheese with a mark from 6 (perceived best as follow-up cheese) to 1 (perceived worst as follow-up cheese). Order of the cheeses was free and returning to a cheese tasted before was possible.

The second and third sessions were devoted to the fish and the vegetarian dish respectively.

For each session, the authors provided freshly bought cheeses, taking care that the characteristics of the cheeses were the same throughout.

For each combination of dish and follow-up cheese, the average score and the standard deviation was calculated.

After establishing the best follow-up cheese for each dish, the two flavour profiles of each combination were compared.

Table 1: The flavour profiles and the flavour style of the three dishes

Dish	Flavour richness	Coating	Contracting	Ripe	Fresh	Flavour style
Green asparagus quiche	8	7	1	6	3	#6
Chateaubriand	8	5	5	8	0	#8
Trout	6	6	3	1	4	#2

Table 2: Characteristics of the cheeses to be judged by the panel as follow-up cheeses

Name	Origin	Milk	Further characteristics
Skaepsrond	Ransdorp, municipality of Amsterdam, the Netherlands	Ewe	Soft white mould cheese, around 200 g; 4 weeks old
Roccolo	Lombardy, region Bergamo, Italy	Cow	Semi-hard cheese, mouldy crust, ripens from outside to centre; 6 months; 2,5 kg
Lady's Blue	Nooitgedacht, Drenthe, the Netherlands	Goat	Blue mould cheese; 3 months; 1 kg
Aged Farmhouse Gouda	The Netherlands	Cow	Hard cheese; 18 months; approximately 15 kg
Dutch Ricotta	Grootegast, the Netherlands	Buffalo	Soft fresh cheese, 2 days
Petit Langres	France, Hte Marne	Cow	Soft cheese, red bacteria, 4 months, 300 g

Table 3: Flavour profiles and flavour style of the six cheeses

Cheese	Flavour richness	Coating	Con-tracting	Ripe	Fresh	Flavour style
Skaepsrond	5	6	1	8	1	#2
Roccolo	4	7	1	4	1	#2
Lady's Blue	9	3	8	6	3	#7
Aged Farmhouse Gouda	6	2	6	5	2	#7
Dutch Ricotta	2	4	2	1	4	#1
Petit Langres	8	5	2	5	2	#6

Table 4: Results of the panel sessions

Dish	Average score and standard deviation for each combination											
	Ricotta		Roccolo		Skaepsrond		Gouda		Petit Langres		Lady's Blue	
	Avg	SD	Avg	SD	Avg	SD	Avg	SD	Avg	SD	Avg	SD
Vegetarian	1.67	0.85	*4.0*	*1.35*	**5.25**	**1.01**	3.50	1.32	2.08	0.95	*4.50*	*1.26*
Meat	1.42	0.64	*4.58*	*0.76*	*4.42*	*0.95*	2.67	0.75	2.33	1.37	**5.58**	**0.64**
Fish	2.92	1.26	**5.42**	**0.76**	4.58	1.11	3.50	1.26	2.50	1.76	2.08	1.11

Results

The results of the panel sessions are presented in Table 4. The averages of the scores of the 12 panel members for each combination are given. The data are completed with the standard deviation for each combination.

In Table 4, we find for each dish a different cheese that is the best to eat after the dish concerned. Also, these cheeses have a very low SD, implying that they were chosen with a considerable level of consensus. The scores for these cheeses are in bold print in Table 4.

For each dish, besides the best follow-up cheese, one or two other cheeses were found that were also suitable. They obtained rather a high score and a relatively low SD. The scores for these cheeses are in italics in Table 4. In Table 5, the selections of follow-up cheeses are summarised.

Discussion

From the results, the first hypothesis can be confirmed: for each main dish, clearly the best follow-up cheese could be found. The one or two cheeses that also had a fairly high score for each dish nonetheless were at a considerable distance from the best and had a higher SD, indicating that the level of consensus among the panel members was lower for these combinations.

The panel members had no information about the flavour profiles of the dishes and the cheeses; they had just their own judgment to go by. Comparison by the authors of the flavour profiles of the dishes and the respective best follow-up cheese revealed considerable similarities in the profile of the dish and the profile of the follow-up cheese selected by the panel. This is illustrated in Table 6

Flavour profiles of the dish and the best follow-up cheese are never identical. But correspondences in flavour richness, coating characteristics and the presence of ripe flavour tones are obvious. Also, the FSC flavour style alone is not decisive for a good match between dish and follow-up cheese.

Clearly, the ricotta did not qualify as a follow-up cheese for any of the dishes due to its low flavour richness and the complete lack of ripe flavour tones.

The Farmhouse Gouda used in this research had only a moderate flavour richness and lacked coating characteristics; this explains its lack of success as a follow-up cheese for any of the dishes.

From the flavour profile, the lack of success of the Petit Langres as a follow-up cheese cannot be explained.

It must be concluded that the FSC model, combined with ripe and fresh tones is potentially a useful tool for predicting the harmony between a given dish and the optimal follow-up cheese. More research is needed but the present research offers a qualified support for the second hypothesis.

Table 5: Best and acceptable follow-up cheeses after each dish

Dish	Best follow-up cheese	Acceptable
Vegetarian	Skaepsrond	Lady's Blue, Roccolo
Meat	Lady's Blue	Roccolo, Skaepsrond
Fish	Roccolo	Skaepsrond

Recommendations

In order to reach more conclusive evidence for the effectiveness of the FSC model plus ripe/fresh for finding the best combination of dish and follow-up cheese, more studies of this kind should be performed. Most likely, a previous training of panel members in using the FSC model and making a flavour profile would be useful. In hindsight, it would have been better to let the panel members to also establish the flavour profiles of dishes and cheeses before judging the optimal combinations. The panel of three authors may have been too small.

Meanwhile, for restaurant practice, this research shows the road to a better structure of menus that contain a cheeseboard. When the service staff in general, and especially the waiter who is responsible for serving the cheese board, are aware of good and not-so-good sequences, good advice to the customers will

Table 6: Similarities in flavour profile between the dish and the follow-up cheese

Dish & Cheese	Flavour richness	Coating	Contracting	Ripe	Fresh	Flavour style
Green asparagus quiche	8	7	1	6	3	#6
Skaepsrond	5	6	1	8	1	#2
Chateaubriand	8	5	5	8	0	#8
Lady's Blue	9	3	8	6	3	#7
Trout	6	6	3	1	4	#2
Roccolo	4	7	1	4	1	#2

lead to a more general satisfaction and some additional sales of the appropriate beverage with the cheese.

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The cheeseboard in Dutch fine dining restaurants, III: Using the FSC model in finding good cheese-wine combinations: A pilot study with red bacteria cheeses

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The authors selected four wines that, according to their restaurant experience, matched well with red bacteria cheeses. Subsequently, an expert panel created flavour profiles of these four wines and of four red bacteria cheeses, using the FSC model by Klosse (2004, 2014). The cheeses and the wines demonstrated great similarities in flavour profile: high flavour richness, a more coating than contracting mouthfeel and a dominance of ripe flavour tones over fresh tones. These results give further support to Klosse's rules about matching food and beverages.

Keywords: flavour profiles, flavour style

Introduction

In fine dining restaurants in the Netherlands, a cheeseboard is often part of the dessert. Usually, it consists of four to six different cheeses of a widely and wildly different flavour profile, from e.g. fresh goat's milk cheese with a very low flavour intensity, fresh tones and mainly contracting, up to a Stilton with a very high flavour intensity, more coating than contracting and high in ripe tones. It is impossible to find one appropriate wine with a cheeseboard like that (see our first paper in this series: "Practices and opinions of restaurant professionals"). One wine for a more restricted sample of cheeses seems more realistic.

From their professional practice and from literature, the authors of the present paper had ideas about appropriate cheese-wine combinations. In the present pilot study, we subjected a selection of red bacteria cheeses and matching wines to the judgment of a professional panel. The research question was: "Do cheeses and wines that match well demonstrate related flavour profiles?" Profiles are made using the FSC model of Klosse (2004, 2014) combined with the presence of ripe and fresh flavour tones

Literature review

In the first of these three papers on the cheeseboard, "Practices and opinions of restaurant professionals", Schulp, Küper et al. (2015) give a literature review about wine-cheese combinations as they were recommended to the general public in the Netherlands in the period 1940–2005. Most authors advised red wines, many of them very rich in tannin, with a variety of cheese. White wines and sweet wines were advised to a much lesser extent, with the exception of port. In literature from the turn of the century, increasingly white wines and sweet wines came up as accompaniment to cheese. Klosse (1998), for example recommends with soft red bacteria cheese a Gewurztraminer or old cream sherry; with blue mould cheese a Botrytis sweet wine or a *vin doux naturel*. This is in line with international literature from the first years of the 21st century. Beckett (2009, 2012) pleads for a balance between cheese and beverage. Other beverages than wine can be taken, all in accordance with the flavour profile of the cheese: sparkling wines, port, sherry, cider, pommeau, apple brandies, beer, whiskey, rum, grappa, gin, jenever, sake, tea, sodas and juices fit all well with a specific cheese. Werlyn (2003) gives also detailed suggestions for cheese – beverage combinations. A few examples: light wines light cheeses; acidic white wines with acidic cheeses, sweet dessert wines with salty, strong cheese – such as blue-veined cheeses.

Harrington (2008) comes up with suggestions that are much in the same line as those by Werlyn. Additionally, he gives suggestions for beer and non-alcoholic beverages. With a varied cheeseboard he advises wines that are generally cheese-friendly, like wines made from pinot noir (red) or an off-dry Riesling (white). On the other hand, hard cheeses can cope, according to him, with almost any wine.

When finishing the wine accompanying the main dish with the cheeseboard, the match between wine and cheese may not be what one would wish. Also, cheese with low flavour richness after a main dish with high flavour richness is not attractive either. Schulp, Gerritsen and de Leeuw (2015) approach this problem in the previous paper, "Integration of the cheese course into the menu".

The work of Klosse (1998, 2004, 2014.) on flavour resulted in the model flavour style cube (FSC), briefly presented in the preceding paper. Two important elements of a flavour profile, ripe and fresh tones, were also introduced.

In red bacteria cheeses and other cheeses, after moulding the cheese, growth of red bacteria on the rind is stimulated, either by washing with brine or alcoholic beverage (e.g. Limburger, Herve, Époisses) or by smearing with a suspension of red bacteria (e.g. Port Salut, Munster). Several species of red bacteria can be involved in the making of these cheeses: *Corynebacterium casei*, *Corynebacterium variabile*,

Arthrobacter arilaitensis, *Arthrobacter* spp., *Microbacterium gubbeenense*, *Agrococcus* sp. nov., *Brevibacterium linens*, *Staphylococcus epidermidis*, *Staphylococcus equorum*, *Staphylococcus saprophyticus*, *Micrococcus luteus*, *Halomonas venusta*, *Vibrio* spp., and *Bacillus* spp. (Fox, 1999). According to Knox, Viljoen, and Lourens-Hattingh (2005), *Brevibacterium linens* is the most important microorganism in red bacteria cheese preparation. The bacteria grow on the outside of the cheeses, and therefore, the ripening process proceeds from outside to inside. Ripening involves proteolytic activity that results in more coating characteristics of the milk proteins and in the formation of free amino acids, small peptides and volatile compounds, imparting the strong odours of most red bacteria cheeses. This is in line with Zhang (2013), because results showed that cheese flavouring agents made by using ripening strains in combination with enzymes had more volatile flavour compounds than those that used only ripening bacterium or just two enzymes.

Methodology

Panel members were confronted with four different red bacteria cheeses and four wines that were deemed appropriate by the authors to accompany red bacteria cheeses. They were asked to create for each item a flavour profile with the dimensions flavour richness, coating, contracting, ripe and fresh.

The panel consisted of 10 food service professionals, seven of them connected to restaurants with one or two Michelin stars, or almost that level, two hospitality management students with special interest in food and beverages and one manager of a prominent cheese business. Due to agenda problems, the researchers visited the individual panel members with the wines and the cheeses. This approach was time consuming for the researchers, and good care had to be taken that the wines and cheeses remained in good condition. Due to this approach, the panel members could not influence each other; this can be considered as a positive methodological spin-off of the otherwise difficult organisation of the panel.

The panel members received a brief instruction in making a flavour profile. They assigned a value for each of the five elements (flavour richness, coating, contracting, ripe, fresh) to each of the wines and the cheeses. After finishing the panel, the average values for each wine and cheese were calculated with the standard deviation.

Some characteristics of the cheeses and the wines used in this research are summarised in Tables 1 and 2, respectively.

Results

The results of the panel are given in Table 3 for the cheeses, and in Table 4 for the wines. These are the taste profiles of the cheeses and the wines as calculated from the panel judgments.

About the cheeses, it can be concluded the red bacteria cheeses have a moderate to very high flavour richness; that coating characteristics are dominant over contracting characteristics and that ripe tones are dominant over fresh tones. The standard deviations are low, indicating a high level of agreement between the panel members.

Likewise, about the wines, it can be concluded that the wines selected have a moderate to very high flavour richness; that coating characteristics are dominant over contracting characteristics and that ripe tones are dominant over fresh tones. Just as in the cheeses, the standard deviations are low, indicating a high level of agreement between the panel members.

Table 1: Some characteristics of the cheeses used

	Taleggio	Marroiles	Reblochon	Époisses
Structure	Half-hard	Half-hard	Soft	Soft
Type of milk	Cow	Cow	Cow	Cow
Percentage of fat	48%	45%	45%	50%
Affinage	5–6 weeks	5 weeks	3–4 weeks	4 weeks
Season	Whole year	Whole year	Summer	Whole year
Origin	Italy (Lombardy region)	France (Picardie)	France (Rhône-Alpes)	France (Bourgogne)

Table 2: Some characteristics of the wines used

	Wairau River	Dr. Crusius	Louis Jadot	Chainier & Fils
Country	New Zealand	Germany	France	France
Region/ Appellation	Marlborough County	Nahe, Traisen Erste Lage	Burgundy AC Côteaux Bourguignons	Pineau des Charentes
Grape varieties	100 % Pinot Gris	60 % Weissburgunder, 20 % Auxerrois, 10 % Grauburgunder 10 % Chardonnay	Pinot Noir / Gamay	St. Emilion de Charentes; Colombard 50 % each
Year	2012	2011	2011	
Production techniques	Partly tank, partly oak fermentation; ripening on lees	Fermentation in steel tanks; cooled. Ripening in large oak vessel	Not specified.	According to Pineau des Charentes: must with 170 g sugar minimal; brandy added. One year ripening on lees in Limousin oak

Table 3: Taste profiles of the cheeses used

Cheese	Flavour richness		Contracting		Coating		Fresh		Ripe	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Reblochon	5.3	0.64	4.5	1.20	6.5	1.36	4.5	0.81	5.9	0.70
Époisses	8.1	0.70	5.8	1.33	7.8	0.75	5.1	1.37	7.7	0.56
Maroilles	8.6	0.49	6.2	1.40	7.2	0.98	4.6	1.02	7.8	0.60
Taleggio	7.8	0.75	6.3	0.64	7.4	0.49	6.2	1.33	7.7	0.46

Table 4: Taste profiles of the wines used

Wine	Flavour richness		Contracting		Coating		Fresh		Ripe	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Wairau River N.Z. 100 % Pinot gris	5.4	0.80	4.6	1.36	6.1	1.70	4.7	1.10	5.7	0.90
Dr. Crusius, Nahe, Germany, Cuvée	7.9	0.70	5.8	1.33	7.7	0.78	5.2	1.25	7.7	0.46
Côteaux Bourguignons, cuvee Pinot noir/Gamay	8.4	0.66	6.0	1.55	7.0	0.77	4.5	1.12	7.7	0.64
Pineau des Charente	7.8	0.75	6.5	0.81	7.4	0.49	6.2	1.33	7.6	0.49

Discussion

From the panel results, the research question: "Do cheeses and wines that match well demonstrate related flavour profiles?" can be answered with a firm "Yes!" Both the four red bacteria cheeses and the four wines selected demonstrated a flavour profile of high flavour richness and a dominance of coating and ripe characteristics over contracting. The level of agreement within the panel was high.

These results give a further support to the thesis of Klosse. In his chapter "New guidelines" for the matching of foods and beverages, he gives the following rules:

- Mouthfeel needs to match: that is, contracting fits contracting, coating fits coating
- Flavour intensity needs to match
- Flavour style needs to match: fresh fits fresh, ripe fits ripe. (Klosse, 2014, p. 235).

In the present research, we started with wines that in general matched well with red bacteria cheeses, and the panel members established the flavour profiles that turned out both for the cheeses and the wine to be matching.

However, generalising the data obtained to all wine and cheese combinations would go too far. Other combinations of different groups of cheeses and wines should be tested before general rules for wine-cheese matching could be formulated. On the other hand, the results obtained illustrate that everyday restaurant experience in combining cheese and wine is confirmed by the systematic establishing of the flavour profiles, and that a high level of consensus among restaurant experts exists.

Recommendations

For further research, more cheese and wine combinations need to be tested in order to find out if the "harmony rules" of Klosse apply universally or if in certain cases wine-cheese matching follows different rules.

For restaurant practice, the flavour profiles, academic as they may seem, are nonetheless a useful tool for matching cheese and wine, and other dishes and wine. When wines arrive in the cellar, let kitchen staff and restaurant staff establish the flavour profile of the wine, and matching of wine and food will become more effective both in designing dishes in the kitchen and in giving advice to customers in the restaurant.

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